Brisbane Regional Tourism Investment and Infrastructure Plan

Incorporating:

Brisbane City & Hinterland, Moreton Bay & Islands and Scenic Rim
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Message from the Minister for Tourism, Regional Development and Industry, the Honourable Desley Boyle

Brisbane plays an important part in the state’s tourism framework. Recognised as amongst the world’s most desirable destinations for leisure, business and lifestyle, Brisbane offers access to a range of diverse and rewarding tourism experiences.

From a sophisticated city experience, to the beauty of Moreton Bay and its islands, there are plenty of reasons why Brisbane is one of Australia’s most visited destinations.

Brisbane already features a wide variety of quality tourism products and experiences, but for the destination to continue to flourish, it must explore new opportunities. A continued focus on developing new product and the infrastructure to support it is vital for the destination to grow in a sustainable manner.

The Brisbane Regional Tourism Investment and Infrastructure Plan has been developed in consultation with government and industry to identify new ideas, investment opportunities and the necessary infrastructure upgrades needed to support tourism growth.

More than ten catalyst projects and 30 investment opportunities have been identified in this plan. The implementation of the plan will create opportunities for the private and public sectors to work together to deliver long-term tourism opportunities for the destination and for Queensland.

Among the challenges over the next 10 years will be to raise the annual economic contribution of tourism to $12.5 billion and create an additional 11,000 tourism jobs above existing forecasts. The key to achieving these targets will be ongoing investment in the industry.

Global travel is predicted to grow at an unprecedented rate over the next two decades and visitors will be looking for new and different experiences.

In order to meet this demand and ensure the continued growth of Queensland’s multi-billion dollar tourism industry, it’s important that we continue to think creatively to identify opportunities that differentiate us from our competition.

We look forward to watching the Brisbane tourism industry grow under the plan, further contributing to our thriving state.

Kind regards

Hon Desley Boyle MP
Minister for Tourism, Regional Development and Industry

Message from The Right Honourable the Lord Mayor Councillor Campbell Newman

Brisbane stands at the heart of one of Australia’s most dynamic regions. It is the gateway to Queensland and a subtropical destination in its own right.

The Regional Tourism Investment and Infrastructure Plan (RTIIP) is a strategy that seeks to increase our tourism potential. It has been developed by Brisbane City Council, Tourism Queensland and our city’s marketing agency Brisbane Marketing.

This plan recognises we must protect our key natural features – such as the Brisbane River, Mount Coot-tha and Moreton Bay and Islands – while we attempt to open them up for others to appreciate.

As Lord Mayor, I am committed to safeguarding Brisbane’s laid back lifestyle and easy sophistication. Above all, I want to ensure any development is sustainable.

Brisbane will flourish best if it retains its unique identity, and this means that we hold onto our roots and we preserve our natural assets.

I look forward to partnering with the tourism industry, the community and State Government in the crucial next steps in this important process.

Campbell Newman
Lord Mayor
### Acronyms

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Brisbane City & Hinterland
Regional Tourism Investment
and Infrastructure Plan
2008 – 2018
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Executive summary

This Regional Tourism Investment and Infrastructure Plan

The purpose of this Regional Tourism Investment and Infrastructure Plan (the RTIIP) is to provide a direction for the sustainable development of tourism in the Brisbane region to 2018.

The RTIIP aims:

- to identify new tourism product that meets future visitor expectations and demands;
- to identify infrastructure requirements to support the ongoing sustainable development of tourism in the region; and
- to provide a focal document for the development of tourism to the region.

The preparation of this RTIIP differs slightly to those prepared for other regions. As identified in the consultancy brief, the region to be covered for the Brisbane plan included the Local Government Areas of Brisbane City, Ipswich City and 13 LGAs in the greater Brisbane area (following local council amalgamations on 15 March 2008 now a total of 8 entities including 4 cities and 4 regional councils).

The broader scope identified in the brief has resulted in the preparation of two RTIIPs, one dedicated to Moreton Bay and Islands – effectively part of the Moreton Bay Regional Council and the City of Redlands1. In addition, a specific Tourism Action Plan (TAP) has been prepared for the Scenic Rim and this is a dedicated appendix to the Brisbane RTIIP document. Whilst these are separate plans they all interlink and need to be considered as one composite plan for tourism for the entire region. They cannot be viewed in isolation.

The RTIIPs have been prepared after conducting consultation with: government agencies; industry operators; developers and investors. Over 300 people were consulted, many on numerous occasions.

By 2018:

- the Brisbane tourism region will be a significant destination for inbound and interstate business visitor markets;
- the Brisbane tourism region will be a significant destination for intrastate, interstate and inbound visitor markets for leisure, including VFR, visitor markets; and
- Brisbane will be positioned as a global city based on fundamental principles of economic and environmental sustainability.

In order that the region does become a significant destination for both visitor markets and remains competitive:

- Brand Brisbane will require further emphasis and increased buy-in, from both domestic and international markets; particularly to address domestic rather than international perception issues;
- Significant and on-going investment in new and enhanced infrastructure will be required to overcome current bottlenecks particularly in road infrastructure, city based accommodation; and
- The region will need to ensure that the product types available suit both key markets of business and leisure visitors and offer visitor attractions and experiences which move the perception of Brisbane from capital city gateway and business hub to also offering leisure pursuits of national significance.

1 The second RTIIP identifies issues and projects for the entire coastline of Moreton Bay, the waters of Moreton Bay and the islands of Moreton Bay. For a geographic interpretation please refer to page 7 of the Moreton Bay and Islands RTIIP. It is important to note that the RTIIP does not reflect the new Regional Council boundary of the same name.
The RTIIP considers infrastructure projects for both the urban and more rural areas in the region (excluding the coast and islands which are covered in the Moreton Bay and Islands RTIIP); and areas where the private sector can be encouraged to invest.

The RTIIP does not purport to canvass all possible projects for the regions. Rather, it focuses on those projects which have been identified as having strong stakeholder support; which are more likely to succeed and those projects which are likely to assist in realising the visions for the region. Investment opportunity criteria have been applied to each project.

What this RTIIP deliberately is not; is a summary of all projects, all plans and strategies. This RTIIP provides a vision for tourism in the Brisbane region. It therefore is selective. It should be recognised that the focus of this RTIIP is on tourism development and investment to particularly attract international and interstate visitation. Local (SE Queensland) recreational users are important but not the focus of this RTIIP.

Within this context it is noted that there are many areas/destinations within the wider Brisbane region which offer important natural, open space and recreational assets. There is a challenge with every major city trying to determine whether a component of a major city, or an adjoining area will be sufficiently interesting or attractive to entice non local visitors.

Where a major or iconic visitor attraction exists, the opportunity often follows to develop commercial tourism product which will entice visitor dispersal away from the city centre. In the case of the wider Brisbane region, the challenge is also the strong product base and profile of both the Sunshine Coast and the Gold Coast with all their attractions within 1-1.5 hours of the Brisbane CBD.

What this RTIIP therefore focuses on is strengthening existing and where appropriate creating new tourism nodes which will help extend visitor length of stay and expenditure and offer greater dispersal throughout the Brisbane region. Because of the commercial imperative which needs to be achieved to support private investment as well as many public funded projects, this requires projects to be prioritised carefully. Many projects were presented and considered by the consultant team. Many could come to fruition once a number of preconditions (infrastructure, etc) are put in place first. This RTIIP is not an audit of all projects. It focuses on those which are more likely to gain stakeholder support and which can lead to many of the others being developed over time.

Catalyst investment projects

There are more than 80 investment opportunities suggested in this RTIIP. Of these, ten are classified as catalyst projects: projects which need to be pursued in order to, among other things, trigger the implementation of others. These catalyst projects are provided to also address major issues, find a clear strategic advantage for the region and stimulate interest and debate. As a necessity many are supply led and are aimed at addressing issues that are constraining Brisbane’s tourism growth. The feasibility of these ideas will need to be tested through more detailed analysis.

The ten catalyst projects are:

1. Internationally significant indigenous visitor attraction on South Bank;
2. Moreton Bay marine focussed aquarium and marine discovery centre attraction on a centrally located river frontage site;
3. Story of Brisbane high tech interpretation centre on Mt Coot-tha and viewing platform of Greater Brisbane and Scenic Rim;
4. Two new/redeveloped river piers for river boat and island boat services (one at Eagle Street and one potentially at North Shore);
5. Consideration of a purpose built Cruise Terminal to supplement existing facilities and developed on the seaward side of the Gateway Bridge to accommodate the new generation of cruise ships;
6. Two major international brand 5-6 star hotels to be built at Victoria Park and a downtown CBD location such as Howard Smith Wharves, Carrilpa Point or Newstead River Park, offering over 600 new rooms;
7. Ipswich to build on the heritage railway theme (create a tourism precinct with conference and accommodation facilities) as the Railway Workshop Museum is a large, high quality facility. Using the existing railway workshop attraction as an anchor for a wider tourism precinct retrofitting existing buildings (if private sector investment allowed) and then link via cycleways, path ways and possibly tram-light rail to the CBD i.e. Transport attraction excitement;
8. Developing a major walk of international significance with associated huts and high quality lodge accommodation infrastructure in the Scenic Rim;
9. Development of a major ferry terminal at or near the mouth of the Brisbane River for faster and more effective linkage between Brisbane CBD and Moreton Bay and Islands; and

Each of the catalyst projects are canvassed later in this RTIIP, except number ten which is detailed in the Moreton Bay and Islands RTIIP.

Key infrastructure projects

Key infrastructure projects which require immediate attention and which are canvassed in this RTIIP are:

1. improving the transport infrastructure within Brisbane. This includes roads, bridges, rail, buses, bikeways, ferries and interaction between the various transport modes;
2. providing land assistance for two major 5-6 star internationally branded hotels to be built in Brisbane CBD;
3. improving the supply of telecommunications services to the hinterland of the region;
4. ensuring sufficient water supply for the entire region, based on a process of environmental sustainability and reuse-recycling; and
5. improving the hinterland roads e.g. route through the Scenic Rim and connections into/bypasses for rural towns and cities from motorways/highways e.g. Ipswich, Beaudesert.

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2 These projects were noted by infrastructure agencies, councils, operators and developers-investors
Additional infrastructure projects

A number of additional infrastructure projects are canvassed in this RTIIP. They include projects to:

- secure skilled and semi-skilled staff which is a significant challenge in all parts of the region currently;
- develop new attractions and activities to generate longer lengths of stay and to encourage greater interstate and international visitation;
- expand the range of and upgrade the accommodation facilities catering to leisure and business visitor markets ranging from eco styled boutique product in the Scenic Rim and Moreton Bay Islands through to major CBD hotels and backpacker hostels; and
- introduce a more effective process for dealing with infrastructure blockages to overcome land use constraints and improve accessibility in particular.

The investment required for the implementation of investment opportunities

The focus is on projects able to be funded by the private sector and which can generate a commercial return. Other projects can be funded by public-private partnerships utilising public assets with private sector investment with the balance being publicly funded projects to provide supporting infrastructure where a commercial return is unlikely.

Next steps

The Brisbane region needs to work closely together to achieve improved visitor growth, increased length of stay and improved visitor yields. The viability of a number of investment projects will be dependent upon encouraging greater visitor dispersal throughout the regions, specifically to the Moreton Bay Islands and Scenic Rim nature-based attractions.

It is suggested that an Action Group be formed to oversee the implementation of the infrastructure projects identified in this RTIIP for the Brisbane region and the RTIIP for Moreton Bay and Islands. The Action Group could be a Destination Action Group as contemplated by the Queensland Tourism Strategy.

The Action Group could be a public-private partnership, including Local and State Government representatives, TQ and Brisbane Marketing (or their nominees), given the need for a whole-of-government approach for many of the projects.

The Government and private sector members of the Action Group will, ideally, be senior personnel with the mandate to make decisions so progress is not hampered by the need to vet decisions.

It is suggested that the Action Group be supported by smaller, working groups that are established to oversee the development and implementation of specific investment opportunities projects. These could be formed to cover Moreton Bay initiatives, Scenic Rim initiatives and Brisbane City and Hinterland specifically.

An implementation strategy should be prepared by or for the Action Group once the recommendations made in this RTIIP, the Moreton Bay RTIIP and the Scenic Rim Tourism Action Plan are agreed. That strategy should provide a tool for progressing, monitoring and reporting upon each of the infrastructure projects.

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3 By this is meant a mix of senior public and private sector stakeholders recognising that for many investment projects there may be a need for both public and private sector funding and investment as well as the need to collectively address infrastructure bottlenecks.
1.1 The Brisbane region

For the purposes of this RTIIP, the region includes the cities of Brisbane, Ipswich and Logan and the regional councils of Lockyer Valley, Scenic Rim, Somerset, and the country hinterland of the Moreton Bay Regional Council. The distinctions in the LGA names reflect the differences within the region. There is a major metropolitan area with a combined population of ~1.394 million and a more rural focus in the hinterland with a population base of ~86,000. This suggests that the two zones will be able to offer different visitor experiences and will subsequently have different visitor profiles.

The Brisbane region is supported by its own regional tourism organisation (RTO) and by two Destination Management Plans (DMP).

Brisbane City is the 3rd largest metropolitan area in Australia and has been the fastest growing between 2001 and 2006. Brisbane City accounted for 24.2% of the state’s population in June 2006. The area known as South East Queensland which includes all the LGAs identified in this plan is forecast to continue to have higher than average population growth over the next ten years (compared to other parts of Australia).

By implication this means there is both a need and financial pressure for, a vast array of infrastructure projects including water, waste management, telecommunications, roads, public transport and aviation to be invested in the short term. These projects will impact on tourism planning. It is already recognised that there is a requirement for greater numbers of visitor beds in the region together with other tourism developments to refresh the existing product offerings.

The following tourism nodes and precincts have been identified within the region including:

- The South Bank of Brisbane City
- Fortitude Valley
- Eagle Street Pier and Ferry Terminal
- Mount Coot-tha
- Airport Precinct (including the second runway and major retail, hotel precinct proposal)
- Northshore Moreton Ferry Terminal
- The heritage city of Ipswich, incorporating the railway workshops, motor sports precinct, Amberley Air Force Base and the river frontage
- Gondwana World Heritage Site (formed by the seven national parks along the Scenic Rim and border of Queensland and NSW)
- Gatton Gourmet Food Centre and Laidley Des Neumann Haus heritage hub.
- Esk Wivenhoe Dam water sport activity centre and Kilcoy Somerset Dam camping and activity precinct and including the mid-Brisbane River as a potential significant adventure water-based activity node.
- Kalbar historic village with markets etc.
- Boonah town centre with new slow food attractions
- Beaudesert as a cultural hub focussed on its Arts Centre
- Canungra as the staging post for Lamington NP experiences
- Mount Mee ridge line road linking Dayboro, Samford and Samsonvale as a highly attractive drive circuit with expansive vistas out to Moreton Bay and Brisbane City and
- Caboolture aviation precinct with focus on heritage aircraft restoration, flight training etc.

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4 Census Fact Sheets No. 1, Department of Infrastructure and Planning, Queensland Government, November 2007
5 This does not include the areas covered in the Moreton Bay and Islands RTIIP
6 Brisbane Marketing (part of Invest Brisbane, an independent agency of Brisbane City Council.
7 The South East Queensland Country DMP was produced in 2007 and incorporates Greater Brisbane Country. The Brisbane Region DMP was released in June 2008.
8 Annual average increase of 19,100 people in five years to June 2006, making Brisbane the LGA with the largest annual growth in Australia. Extract from Queensland Population Update No. 10, Department of Local Government, Planning, Sport and Recreation, Queensland Government, August 2007, page 2
9 Ibid, page 12
The above map reflects the Brisbane tourism region.

Most visitor experiences in the Brisbane region are located in the metropolitan area including South Bank and the Brisbane River. Hinterland activities focus on natural attractions in: the Scenic Rim, Lockyer and Esk Valleys, and Somerset whilst the heritage city of Ipswich has a strong and unique transport theme.

The Brisbane region’s visitor experiences found mostly on the region’s islands and coast are discussed in the separate Moreton Bay RTIIP.

1.2 Development and promotion of the region

Brisbane sees itself as a modern, vibrant, sophisticated but casual capital city. However, a challenge the Brisbane Region has is to market itself both domestically and internationally, in a state where tourism activities in non-capital areas are better known than the city and its hinterland including the Scenic Rim, valleys and Moreton Bay and Islands.

Non Queenslanders may still not perceive the city as a leisure option, with insufficient activities and product and a city which at times is difficult to navigate as a pedestrian visitor. Conversely, Brisbane is becoming an increasingly important place to do business. The success of the convention and exhibition centre 11, will be further enhanced by its new $130 million expansion program announced in early 2008.

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10 Map provided courtesy of Brisbane Marketing

The city and its hinterland need to work synergistically together to:

- develop new and redeveloped product that appeals to target visitor markets, including day visitors from the neighbouring regions of the Gold and Sunshine Coasts and the Southern and Darling Downs: this could be a combination of ‘big city’ attractions and rural ‘away from it all’ events and activities;
- improve its transport infrastructure, including the lack of public transport options to regional areas;
- further develop Brisbane as a key convention and events location and with added visitor attractions to also appeal to incentive markets; and
- develop combined city and rural short breaks/holidays for events/shows and regional relaxation and replenishment.

Working together will also help develop and strengthen the combined urban and regional product development themes associated with: retailing, business travel and convention activity, arts and events precincts, vibrant modern architecture, food and wine trails, built heritage trails, world heritage national parks, thrill-seeker experiences, water activities based around man-made dams and lakes and major supporting infrastructure (roads, public transport, signage, dams, water pipelines and treatment stations).

An emphasis on sustainable tourism experiences would be beneficial for the area over the next decade. With its world heritage landscapes and regional qualities, the SEQ Regional Plan recognises the need for protecting both the natural attractions and the region’s character.12

Tourism development needs however are often not integrated into urban and rural planning strategies and policies. This has often lead to significant challenges in getting approvals for tourism projects which can add value to both the natural and built environments.

12 SEQ Regional Plan 2005-2026, Queensland Government, page 85
2 Methodology

2.1 Steps taken to compile this RTIIP

To prepare this RTIIP, the consultants:

- reviewed documents referred to in the bibliography on page 17 of the Scenic Rim Tourism Action Plan that accompanies this RTIIP;
- conducted interviews with some 300 stakeholders in regards to the development of tourism to the regions: a list of most people interviewed is on page 20 of the Scenic Rim Tourism Action Plan;
- conducted focus group sessions within the regions;
- tested options, issues and opportunities with the Project Steering Committee established for this RTIIP; and
- held confidential discussions with major regional and national investors to test interest with any or all of the opportunities identified in this RTIIP.

2.2 Data sources and limitations

The consultants have sourced quantitative data from a range of sources. Where possible, the sources are identified. Some information has been obtained from confidential sources and has not been attributed any source provider as a result.

The consultants have not provided marketing data for the region in this RTIIP: those data are not considered core to the Plan and the accuracy of data at times is compromised by small sample sizes.

Much of the data has not been able to be independently verified: the data have therefore been accepted in good faith.

Every effort has been made to present a robust and complete picture of tourism development to the region but there are inherent limitations in data sets.

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13 Approximately 17 additional people specifically asked that their names be kept confidential. All of these are Investors, developers or advisors to tourism projects.

14 Marketing data including qualitative and quantitative material on the regions can be accessed from either the RTDs or TQ.
3 A vision for Brisbane

3.1 A vision for Brisbane City

Brisbane is the capital of the State of Queensland. It is also identified as the second-fastest growing city in the western world. The city contains over half of the population of the entire Brisbane Marketing region (53% as identified from census 2006 data).

As the key political and financial centre for the state, tourism (particularly leisure visitation) can be overlooked with regard to its importance. The delivery of transport infrastructure, new parks and green space, shopping and arts precincts are, however, as important to visitors as they are to the growing population within the metropolis.

“Melbourne was Australia’s premier city of the 19th century. The 20th century belonged to Sydney. The demographic and cultural shifts evident in Brisbane now and over the last decade suggest that the early decades of the 21st century will be Brisbane’s time of blossoming.”

As the city forges ahead, the tourism industry needs to ensure its investments keep pace. As noted earlier, traditionally visitors have sometimes bypassed the state capital in their haste to reach the tropical north; with its beaches, reefs, islands and rainforests or the attractions of the Gold Coast to the south. Without ongoing new developments, particularly of accommodation, visitors may limit their stays.

The vision for Brisbane needs to encapsulate the following:
- A sophisticated yet relaxed global city
- World heritage national parks and marine parks within close proximity
- A major city and environs which can grow sustainably and offer a quality environment for its residents and visitors alike
- The base for visitor experiences of national significance and the natural gateway to the state

15 Our Shared Vision: Living in Brisbane 2026, Brisbane City Council, undated, page 40
16 Bernard Salt, Demographer, KPMG. Quote from the South Bank: Brisbane’s Icon publication, Queensland Government, undated, page 10
The vision identified in the Brisbane DMP is:

“Brisbane is recognised amongst the world’s most desirable destinations for leisure, business and lifestyle – a youthful and progressive Australian city offering diverse and rewarding tourism experiences.”

To achieve the vision, there is a need to:

- ensure infrastructure developments including new tourism zones e.g. Mount Coot-tha are developed with tourists and residents in mind and are well connected and easy to access;
- ensure that as part of an overall transport plan, visitor needs are taken into consideration, including making the city more pedestrian friendly;
- ensure that the Brisbane water supply is able to cater for future visitors and that smart eco design is incorporated into future tourism product;
- ensure that telecommunication structures are first class for both residents and visitors (especially the business segment with a wireless based user friendly CBD);
- ensure that master planning for urban and rural precincts allow for tourism product opportunities and that planning regimes are tourism friendly and not restrictive;
- undertake renewal of existing tourism product to ensure appropriate for the demands of the key Brisbane Region markets;
- construct new accommodation facilities, especially larger 4, 5 and 6 star hotels in Brisbane CBD and boutique facilities in the broader region;
- develop new tourism product which will be attractive to business visitors and their associates, in order to entice more meetings and events in the region and to encourage both dispersal and longer stays, thereby enhancing tourism’s contribution to the local economy; and
- enhance the connection between capital city and rural hinterland to encourage and improve synergies for the visitor and offer seamless dispersal opportunities for city and region experiences.

### Table 2: Brisbane region – Forecast visitors (visitor nights)

<table>
<thead>
<tr>
<th>Brisbane Region17 Year Ended December 2007</th>
<th>Increase on 2007</th>
<th>Average Annual Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Forecast Visitors and Visitor Nights</strong>18</td>
<td>200718</td>
<td>2012</td>
</tr>
<tr>
<td>Visitors ('000)</td>
<td>907</td>
<td>1,154</td>
</tr>
<tr>
<td>Visitor Nights ('000)</td>
<td>12,697</td>
<td>15,716</td>
</tr>
<tr>
<td>Average Length of Stay</td>
<td>14.0</td>
<td>13.6</td>
</tr>
<tr>
<td><strong>Domestic Overnight</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitors ('000)</td>
<td>4,881</td>
<td>5,509</td>
</tr>
<tr>
<td>Visitor Nights ('000)</td>
<td>15,412</td>
<td>14,782</td>
</tr>
<tr>
<td>Average Length of Stay</td>
<td>3.2</td>
<td>2.7</td>
</tr>
<tr>
<td><strong>Total Market</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitors ('000)</td>
<td>5,788</td>
<td>6,663</td>
</tr>
<tr>
<td>Visitor Nights ('000)</td>
<td>28,109</td>
<td>30,498</td>
</tr>
<tr>
<td>Average Length of Stay</td>
<td>4.9</td>
<td>4.6</td>
</tr>
</tbody>
</table>

17 For the purposes of tourism data collection and analysis Brisbane includes the entire Brisbane Marketing Region RTO: the cities of Brisbane, Ipswich, Logan and Redlands and the regional councils of Looiker Valley, Moreton Bay, Scenic Rim and Somerset.

18 Based on the percentage increases as detailed in the Tourism Forecasting Committee Forecasts Issue 2, 2007 published by Tourism Research Australia, November 2007.

3.2 Vision and strategic direction for Brisbane

The vision described in the 2007-2010 South East Queensland Country DMP\(^{20}\) is:

“South East Queensland Country (SEQC) is recognised as a destination known for its country hospitality, distinct seasons and rich provincial visitor experiences characterised by a burgeoning tourism industry that embraces its regional community.”

The Scenic Rim’s Unique Selling Point is described as “…a vast region of mountains, rainforest and valleys embracing the World Heritage wilderness of the McPherson Range.”\(^{21}\)

To achieve the vision and for visitors to identify the region as that described in the marketing collateral, there is a need for the region to offer hinterland experiences that better cater for the region’s target visitor markets, especially the short break drive market.

Developments required to achieve higher visitor numbers and improved visitor yields from the core and developing markets include:

- enhancing the road infrastructure in the region, particularly of non-major highways with information bays, lay-bys with picnic facilities and viewing platforms, improved interpretative signage;
- connecting the towns in the Scenic Rim with better public transport, i.e. mini bus services and expand beyond the reliance on private vehicles or hire cars;
- ensuring greater collaboration between tourism and conservation organisations, especially for better visitor opportunities within and on the periphery of national parks;
- investing in a wide variety of accommodation types including caravan parks and eco-resorts in order for visitors to have a quality selection when choosing to stay in the Brisbane region;
- enhancing the Brisbane hinterland with innovative nature-based projects and action-based activities (rafting, kayaking, mountain biking and horse riding trails);
- creating a major walk through the Scenic Rim with accommodation facilities i.e. huts or high quality tent camps;
- developing and promoting a greater number of regional wellness centres and day spas to promote the relaxed feel of the region and to encourage longer length of stay from day tripper to overnight guest;
- developing a more co-ordinated food and wine experience, available 365 days of the year throughout the region built around the slow food gastronomy experience and high quality farm produce grown in the region; and
- upgrading the look and feel of the towns in the region through town beautification programs including preservation of older buildings etc.

It is acknowledged that quality built development is necessary for the hinterland to improve its visitation and length of visitor stay. It should also be noted that since 2006 some of the region has been designated as Major Development Areas\(^ {22}\). This could impact on planning for some potential projects and if developed unsympathetically could easily detract from tourism. An example is the introduction of traditional urban housing schemes in rural areas without the benefits of neighbourhood shopping, attractive and well integrated open spaces and landscaped areas in favour of more utilitarian housing design and lack of adequate supporting infrastructure.

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20 SEQC Destination Management Plan 2007-2010, page 8
22 South East Queensland Regional Plan 2005-2026, Queensland Government, Amendment 1 October 2006, page 7
3.3 Regional uniqueness

The Brisbane region shares some similarities with a number of other Queensland regions. However, its uniqueness is that it is the State Capital and therefore may have aspirations for major developments that other regions cannot hope for.

A priority outcome for this RTIIP is to find appealing and practical tourism investment opportunities which help to build a sense of uniqueness and sense of place for the city and its hinterland and incorporate a more inspiring reason to visit.

Some unique elements of the Brisbane region which could be utilised for tourism purposes include:

- the architecture of the City’s CBD and the potential development of its underutilised lane ways and back alleys;
- the creation of viewing platforms and bars/cafes on the tops of prominent and high buildings to allow an overview perspective of the city to be gained;
- the Brisbane River and the use of it as a major transport thoroughfare;
- South Bank and in particular its major cultural assets including GOMA;
- the world heritage listed national parks of the Scenic Rim;
- the inland waterways, specifically the lakes and dams of Somerset and the associated river systems;
- the food and wine trails especially of the Lockyer Valley; and
- the proximity of a rural heartland with country hospitality situated next to a major metropolitan area.

As major infrastructure developments occur over the next decade, the Brisbane region must identify prior to developments occurring, any possible negative impact they will have on existing built environments. The city and the hinterland should ensure that progress does not undermine unique tourism product worthy of preserving and enhancement to avoid the region losing its special sense of place and importance to the State as a whole.

There is an acute shortage of affordable land within the city centre for major hotels in particular. The abundance of serviced apartment complexes in favour of fully serviced hotel facilities reflects the challenge many hotel investors and developers have experienced in Brisbane over some time with making accommodation projects profitable.

As the State’s business hub, and with limited opportunity to create an alternative business centre which would appeal to both business and leisure visitors, the existing Brisbane CBD remains the focus for tourism development.

Secondary tourism nodes include the proposed development at North Shore and within the airport precinct. But it is the city centre which is likely to hold the greatest appeal to business and leisure visitors alike over the next ten year period.

It is estimated that over 20% of the Brisbane CBD is dedicated to Government office space. Strategic consideration may need to be given to creating a dedicated government centre ideally on a rail corridor and within 5km of the CBD in the future to free up floor space for commercial developments including hotels.

The typography of Brisbane’s CBD and the limited expansion possible due to river, rail and associated boundaries provides interesting challenges not only for tourism, but commercial development generally. The consultants note the options for:

- Significantly expanding the building height within the CBD
- Actively encouraging multi-purpose commercial development where preference might be given to major fully serviced hotel facilities above retail and office; and
- Where an integrated and seamless public transport system allows efficient access between the various city precincts including South Bank and the Valley. Whilst previous feasibilities have shown the difficulty in creating a viable light rail to try and link some of the city’s precincts, consideration needs to be given to reassessing options such as:
  - expanding the current low cost tourist bus service around the city
  - looking at linking the Valley, South Bank and CBD with a heritage tram or light rail styled transport system which may be to offer a number of themed experiences (pure visitor attraction link, evening dining option, jazz experience, art experience, etc.)
  - developing a dedicated bus transit way to speed commuter travel and better link the various precincts
  - combining a combination of dedicated ferry service linked to light rail.

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23 Excluding Moreton Bay and Islands; which are discussed separately within the Moreton Bay and Islands RTIIP
24 Often funded through sales of individual units or apartments
4 SWOT analysis

An analysis of the strengths; weaknesses; opportunities and threats for the Brisbane Region follows. The Analysis focuses on the potential competitiveness of the region for tourism investment and the desire to position Brisbane as an attractive global city of significance in the future.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane CBD; urban quality and experiences</td>
<td>Interpretative signage is limited and need more seating and lighting in CBD and region</td>
</tr>
<tr>
<td>Sunshine Coast and Gold Coast attractions very close</td>
<td>Brisbane is capital city but has character of country town (non Queenslander perception)</td>
</tr>
<tr>
<td>Old Art Gallery and GOMA</td>
<td>Public transport not always accessible</td>
</tr>
<tr>
<td>Brisbane’s cultural precincts and institutions, including South Bank, Park Road, New Farm</td>
<td>Lack of connectivity between precincts in the city e.g. Valley needs to join up with the CBD and between towns in the hinterland</td>
</tr>
<tr>
<td>Brisbane is a capital city but has a relaxed character more reminiscent of a large country town</td>
<td>Sunshine Coast and Gold Coast very close leisure hubs and draw business away from Brisbane</td>
</tr>
<tr>
<td>Vibrant music scene in the Valley</td>
<td>No indigenous tourism product in Brisbane</td>
</tr>
<tr>
<td>Brisbane City is a hub for backpackers</td>
<td>Lack of 4-5 star hotels, particularly brand names, in the city</td>
</tr>
<tr>
<td>Lone Pine Koala Sanctuary</td>
<td>Bus way not helpful for visitors because utilised by commuters and routes don’t easily link tourist venues-locations</td>
</tr>
<tr>
<td>The River with its public transport of citycats and river vibrancy</td>
<td>Lack of affordable land to develop for tourism</td>
</tr>
<tr>
<td>Subtropical climate and landscape including attractive flora</td>
<td>Local residents need more education on the benefits of tourism (lack of awareness)</td>
</tr>
<tr>
<td>Character housing areas which create destination precincts not suburbs</td>
<td>Operating hours of activities too limiting (too many close at 5pm) – insufficient night time experiences</td>
</tr>
<tr>
<td>Major international airport with new second runway by 2015</td>
<td>City is constrained by roads, railway line and river</td>
</tr>
<tr>
<td>Proximity to Australia’s trade coast</td>
<td>Lack of CBD building with viewing area (hard to get a overview perspective)</td>
</tr>
<tr>
<td>Australia Zoo at Sunshine Coast</td>
<td>No iconic attraction</td>
</tr>
<tr>
<td>Five sporting franchises</td>
<td>No investment incentives to build 5 star hotels and resorts, capital expenditure into tourism projects is very limited</td>
</tr>
<tr>
<td>The beauty of the hinterland and its closeness to a metropolitan area as well as coastal region</td>
<td>Need to link trains (especially the Air Train) and citycats</td>
</tr>
<tr>
<td>Hinterland and rainforest proximity to Brisbane</td>
<td>River is not always accessible for more activities; South Bank Wharf needs to be better connected to the rest of the city</td>
</tr>
<tr>
<td>Parts of the region have a climate which is 7º cooler than Brisbane (attractive micro climate)</td>
<td>CBD physical conditions make it difficult for pedestrians accessibility (car is still king)</td>
</tr>
<tr>
<td>Scenic Rim National Parks and their world heritage status</td>
<td>There is a lack of attractions in the hinterland to encourage increased length of stay</td>
</tr>
<tr>
<td>Motor cross opportunities and motorbike touring in the region</td>
<td>City is a work in progress. Danger of losing Queensland vernacular building and landscape style</td>
</tr>
<tr>
<td>Family affordable holidays options</td>
<td></td>
</tr>
<tr>
<td>Pine Rivers has ten golf courses within 30 minutes drive of one another</td>
<td></td>
</tr>
<tr>
<td>The blend of country-style towns with pubs, heritage buildings and small farms</td>
<td></td>
</tr>
<tr>
<td>Beautiful hinterland drives e.g. Woodford to Samford, with mountain scenery and Helidon plant life</td>
<td></td>
</tr>
<tr>
<td>Wine trails</td>
<td></td>
</tr>
</tbody>
</table>

25 Moreton Bay and Islands SWOT Analysis is undertaken in the Moreton Bay and Islands RTIIP
<table>
<thead>
<tr>
<th>Strengths cont.</th>
<th>Weaknesses cont.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural industry, especially dairy with links to events via Gatton University</td>
<td>Brisbane does not have an icon event or an iconic piece of infrastructure or attraction</td>
</tr>
<tr>
<td>Gatton’s indoor equestrian centre</td>
<td>City requires a major transport inter-change hub</td>
</tr>
<tr>
<td>Adventure activities including horse-riding, parachuting, river canoeing, motorcross</td>
<td>Hinterland north from Brisbane lacks a good drive market despite its closeness to the city</td>
</tr>
<tr>
<td>Country crafts and boutique artists e.g. Faberge eggs (Esk)</td>
<td>Pine Rivers, part of the rural hinterland, has no tours and no packages to the area</td>
</tr>
<tr>
<td></td>
<td>Accommodation, hotels, motels, farm stays, caravan parks, backpackers, B&amp;B is lacking in hinterland</td>
</tr>
<tr>
<td></td>
<td>More retail shopping is needed</td>
</tr>
<tr>
<td></td>
<td>Lack of activities to entice overnight stays in Brisbane</td>
</tr>
<tr>
<td></td>
<td>Lack of children friendly attractions</td>
</tr>
<tr>
<td></td>
<td>There is a lack of directional and interpretative signage throughout the city and region</td>
</tr>
<tr>
<td></td>
<td>There is limited public bus facilities and limited public transport in hinterland</td>
</tr>
<tr>
<td></td>
<td>Not enough local farm produce being sold in the area and limited farm gate experiences</td>
</tr>
<tr>
<td></td>
<td>Regional restaurants are not always open on Sundays and quality and service not appealing for Brisbane/Gold Coast market</td>
</tr>
</tbody>
</table>
Opportunities

- Create tourism precinct based around the River in Brisbane, including bike paths and more water-based activities
- Create a design library fashioned after Singapore’s
- Night time entertainment for South Bank and / or Botanical Gardens
- Council is amending the town plan to allow higher buildings but will need to be significantly higher to cope with growth
- Put development at top of Kangaroo Cliffs for entertainment, dining
- Investment into events needed, including arts-related with a focus on the Queensland Art Gallery’s contemporary Asian and contemporary Pacific collections and sports-related events
- Mount Coot-tha redevelopment and interpretation of Brisbane and Scenic Rim
- Cruise shipping terminal will need to be relocated to cater for larger vessels and better connectivity to CBD required
- Significant Indigenous cultural attraction.
- Enhance public spaces such as Botanical Gardens and Mount Coot-tha for new high quality visitor experience
- City cats are full of tourists so visitor commentary/experience option or a new river experience by tourism operators
- Creation of more outdoor food experiences e.g. Wine and food bars on office roofs in CBD, more aesthetic footpaths to allow for alfresco dining
- Better quality regional cafes will encourage the more sophisticated Brisbane market
- River side aquarium and marine discovery centre in CBD location as nationally significant visitor attraction with focus on Moreton Bay ecology
- Brisbane Master Plan for Transport and Tourism – Tourist Friendly Brisbane needed i.e. not just transport infrastructure to support only residents, but good for visitors too
- Hinterland could create activities such as lavender farms, cider house, cheese factory, chocolate factory as catalyst project for smaller areas
- The hinterland lends itself to country style lodges and chalet developments, as well as Wellness Centres, health retreats
- Some hinterland towns have small collections of attractive older buildings which could be made into stop-offs on a drive tour and / or antique retailing opportunities
- Motorcross/speedway at Gatton could be expanded for visitor attractions as well as events / motorsport precinct in Ipswich
- Interpretation centre offering a focus on organic product history etc. for Boonah or Gatton
- Sports tourism and events e.g. Equestrian activities and greyhound racing in Gatton
- Large interpretative centre focused on the scenic rim history, national parks etc at Canungra
- Soft action activities e.g. Canoeing on the Mid-Brisbane River in Somerset Regional Council; 5 sites identified for different multi-purpose uses
- Create farm-gate food experiences/tours e.g. Forest Hill, Lockyer, Boonah

Threats

- Red tape is a major issue impeding development interest and projects
- Council regulations very restrictive with noise in inner city yet need for vibrancy
- Lack of available land in right places – need to sell air space
- The Valley is seen by some as the location for tourism – not cost effective to build in Brisbane but the CBD needs tourism growth
- Lack of cab licences for sale so not enough cabs on the road
- Some tourism operators are not sure that the Government wants to grow leisure tourism for Brisbane City. Wrong message being heard.
- Government legislation is too hard on tourism and restricts agri tourism
- Some hinterland communities are not supportive of tourism; a need for a highly effective public consultation process and program to get rural communities accepting tourism is required
- Old signs need replacing by new signs but perception that the Department of Main Roads is an obstacle to getting new signage introduced
- Belief by operators that some Councils may not fully understand tourism, so won’t provide visitor centres or support
- QPW concerns in regard to creating a walking trail (similar to Tasmania’s Cradle Mountain) in the Scenic Rim National Parks
- EPA’s belief that environmental impact from agriculture e.g. Beef cattle (that wander anywhere on the mountains of e.g. Glen Rock) is less than that of humans (who would be forced to use appropriately built trails)
- Limited education/knowledge of the industry with some operators; training is vital
- Mid-Brisbane River recreational opportunities require significant public funds for improved site access, signage, waste facilities, public toilets, site management, interpretation and accommodation options
- Heritage buildings that are being managed by volunteer organisations which are struggling to maintain the infrastructure e.g. Caboonbah Homestead (Somerset RC)
- Supply of labour problems and limited service culture
- Both city and hinterland suffer from limited opening hours for retail and dining (compared with other national and international destinations)
- Redevelopment of the Roma St Rail Centre and concern about Roma Street and a quality interchange with adequate capacity for the future
- Inability to adequately address Brisbane City road traffic congestion over next ten years
- Ability of Brisbane Airport to create gateway business centre precinct which reduces need to stay – travel into the CBD
- Lack of funding for major visitor attractions which prevents leisure visitor growth into Brisbane region
- Lack of connectivity from Brisbane CBD to Moreton Bay Islands
- Inability to open up walking trails and overnight accommodation in National Parks around Beaudesert and Boonah
- Continued perception by some that Brisbane is merely the gateway to Gold and Sunshine Coasts and no need for leisure attractions
Feedback during the preparation of this report indicates that there is a shortage of all accommodation types in the Brisbane Region.

For Brisbane City it is imperative that new 4, 5 and 6 star hotels are commenced as soon as possible. The time from when a major hotel project is contemplated, to opening day, is often more than 3-4 years. Brisbane City occupancy rates are already at 80%26. This means that on many days of the year it is impossible for visitors to obtain a bed in the city. It is likely that some visitors are choosing not to come to the city, for business or leisure, because of this limitation.

And as advised to the consultants, there is a need, in the hinterland, for additional accommodation facilities that cater to a wide range of leisure markets. This includes a series of caravan parks (with camping and cabin facilities) close to key towns, backpacker accommodation (especially required for working holiday makers who are spending time on the farms in the area), farm stays, guest houses and bed and breakfast (preferably using heritage buildings), modern motels and upmarket resorts with spa facilities.

The following table covers current and forecasted commercial accommodation requirements to the Brisbane region. The table provides:

- projected demand for new rooms27;
- the estimated number of new rooms which may need to be constructed by 2018 to meet additional visitors projected for the region;
- an estimate of the impact on future visitor numbers should all rooms at the planning, approval or construction phase be completed;
- an estimate of new investment required based on an average development cost per room of $265,000; and
- an estimate of refurbishment requirements for all existing accommodation over the next ten year period based on an average cost per room of $95,000.

### 5.1 Room requirements for the Brisbane region

The following table provides an analysis of the number of rooms overall required for the region over the 2008-2018 period. Three separate estimates are provided based on the following rationale:

- Assuming that only existing (current) room stock is available over the next ten year period and identifying demand for new rooms by 2018 in order to achieve an 80% occupancy level in all commercial accommodation
- Identifying current room stock and adding in those rooms currently under construction (or shortly expected to be under construction) within the region and identifying demand for any additional rooms required by 2018 in order to achieve an 80% occupancy level in all commercial accommodation
- An estimate based on all current room stock, all rooms under construction and all rooms currently at the planning or developmental approval stage and identifying demand for any additional rooms required by 2018 to achieve an 80% occupancy level in all commercial accommodation assuming that all of these rooms are actually constructed over the next ten year period

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26 Survey of Tourist Accommodation, Australian Bureau of Statistics, Quarter ended 31 December 2007, Small Area Data for Brisbane, extrapolated
27 All forms of commercial accommodation have been placed together including hotels, motels, resorts, backpacker hostels, serviced apartments, but excluding cabins and caravan park sites.
The consultants have deliberately separated out the current room stock from that under construction and those being discussed and planned in order to reflect the difference in the quantum of rooms required to be developed over the next ten year period under these three scenarios. That is, noting that many developments are currently being talked about but relatively few rooms are currently under construction and in the current 2008-09 economic climate a number of projects could well be deferred for some time or even not proceeded with. There are also a number of underlying assumptions which should be considered when reviewing this data:

- The information assumes that the source data from the Australian Bureau of Statistics and Tourism Queensland on the average length of visitor stay on average is accurate (approximately two nights per stay in commercial accommodation and with a slight increase to 2.4 nights in a commercial accommodation by 2018 reflecting the wider range of visitor experiences possible within the Brisbane region).
- The consultants consider that the average length of visitor stay within the Brisbane Region (rather than Brisbane City) is significantly skewed by longer term business, educational and international VFR travel. As a result we have applied a lower length of stay which we believe reflects current leisure and business travel to the region.
- The current achieved annual occupancy rate in 2007 of approximately 81% and a forecasted desired room occupancy by 2018 of 80%.
- In the absence of data to show demand for specific room types over the 2008-2018 period it is assumed that all rooms are substitutable (i.e. that the market for an eco resort style facility would also consider and use a standard serviced apartment).

Whilst this may not necessarily be able to be substituted for many markets, for the purposes of assessing new room requirements the Group has applied the principle of substitutability. The details of current room stock, average length of stay, the ratio of guests per room and overnight visitor numbers is based on assessments provided by Invest Brisbane and Brisbane Marketing, Tourism Queensland with sourced data from the Australian Bureau of Statistics.

On the basis that all rooms under construction and planned proceed over the next ten year period there is likely to be a need for relatively few additional rooms to meet the forecasted visitor growth out to 2018.

By comparison, if one merely applies the current room stock and those rooms currently under construction there is likely to be a need for at least a further 3,087 additional rooms over the 2008-2018 period to cater for the forecasted visitor growth into commercial accommodation facilities.

If current rooms under construction are put on hold and not proceeded with, then the additional new rooms required over the 2008-2018 period increases to 3,542 new rooms.

This assessment of new room requirements should be considered conservative in light of the fact that:

- potentially new accommodation facilities provided in areas of the Brisbane region such as the Scenic Rim or within Moreton Bay are unlikely to be substitutable for CBD hotel rooms in downtown Brisbane;
- some existing room stock may be removed from the supply rather than refurbish, a choice may be made to change the building use to residential;
- the cost of a mid range quality room will obviously differ from an upmarket (5 star) quality room and may not be able to be substituted because of market resistance on pricing; and
- as the various projects planned by developers, Regional Councils and other entities come to fruition within the Brisbane region over the next ten year period, further rooms are likely to be required to assist in the creation of sub destinational tourism nodes through out the Brisbane region.

Balanced against this is the economic climate which over the 2008-2018 period is likely to result in limitations being placed on commercial accommodation development projects proceeding certainly in the short-medium term.

Applying a broad figure for the indicative costs for creating a new mid-higher level room the indicative investment required just applying current room stock and excluding any development currently under construction or planned will necessitate at least $939 million in new investment to the accommodation sector over the 2008-2018 period. This figure reduces to $818 million if all current development underway is fully completed (acknowledging that some development is proposed on a staged basis and may therefore be smaller in scale than previously planned). If all development as planned is proceeded with over the 2008-2018 period, then the level of new investment over and above this level required is reduced to $105 million.

Much of the existing accommodation stock however will require refurbishment over the next ten year period. On the basis that a reasonably large percentage of that accommodation stock is going to require redevelopment rather than merely refurbishment in order to keep it marketable and profitable, the Group has applied an average room refurbishment cost of $95,000 for the 2018 period. Assuming that virtually all accommodation will require refurbishment and/or redevelopment over the next ten year period this is estimated to require a further $1.1 billion in new investment to meet this requirement based on current room stock and increasing to $1.4 billion for current, constructed and planned room stock over the ten year period out to 2018.
Table 4: Additional room requirements – Brisbane
(Figures based on year ending December 2007 data)

<table>
<thead>
<tr>
<th>Demand Driven (visitor growth needs)</th>
<th>Supply Led (to fill current and new rooms)</th>
<th>Supply Led (to fill current, new and planned rooms)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Room Stock Only</td>
<td>(assumes all approved development goes ahead)</td>
<td>Current Actual Developments</td>
</tr>
<tr>
<td>Current Room Stock Only</td>
<td></td>
<td>Current and Proposed Developments</td>
</tr>
</tbody>
</table>

| 2008-2018                              | 1,021,850 | 1,021,850 | 1,021,850 |
| Additional overnight visitors expected in commercial accommodation by 2018 |
| Additional overnight visitors expected including VFR | 1,515,000 | 1,515,000 | 1,515,000 |
| Average length of stay in commercial accommodation | 2.4 | 2.4 | 2.4 |
| Estimated visitors in 2018 staying in commercial accommodation | 4,573,290 | 4,573,290 | 4,573,290 |
| Total required room stock by 2018 | 15,035 | 15,035 | 15,035 |
| Annual room nights required | 4,390,358 | 4,390,358 | 4,390,358 |
| Additional new rooms required from 2008-2018 | 3,542 | 3,087 | 398 |
| Forecast room occupancy level in 2018 | 80% | 80% | 80% |

| Current room capacity (2008) |                                             |                                             |
| Current room stock | 11,493 | 11,948 | 14,637 |
| Annual room nights available | 4,194,945 | 4,361,020 | 5,342,506 |
| Average annual occupancy rate (assumes 2007 visitor numbers) | 81% | 78% | 63% |
| Average length of stay in commercial accommodation | 2.0 | 2.0 | 2.0 |
| Average guests per room ratio | 2.1 | 2.1 | 2.1 |
| 2007 overnight visitors in commercial accommodation | 3,551,440 | 3,551,440 | 3,551,440 |
| Total 2007 visitors including VFR in private homes | 5,664,600 | 5,664,600 | 5,664,600 |
| Current commercial only room nights required | 3,382,324 | 3,382,324 | 3,382,324 |
| Indicative new investment required | $ 938,755,603 | $ 818,180,603 | $ 105,595,603 |
| Assumed refurbishment cost for existing | $ 1,091,835,000 | $ 1,135,060,000 | $ 1,390,515,000 |

5 Analysis of accommodation
6 Investment opportunities

6.1 The catalyst projects

As indicated earlier in the report, there are ten recommended catalyst projects for the region. As a necessity many are supply led and are aimed at addressing issues that are constraining Brisbane's tourism growth. The feasibility of these ideas will need to be tested through more detailed analysis.

1. Internationally significant indigenous visitor attraction on South Bank;
2. Aquarium and Marine Discovery Centre on a centrally located river frontage site;
3. Story of Brisbane at Mt Coot-tha;
4. Development of Brisbane River Piers;
5. Relocation and redevelopment of Cruise Terminal;
6. Two major international brand 5-6 star hotels to be built at Victoria Park and a downtown CBD location;
7. Ipswich Railway Heritage precinct development with convention centre;
8. Developing a major walk with associated huts and high quality lodge accommodation infrastructure in the Scenic Rim;
9. Creation of a new ferry terminal for Moreton Bay Islands on Brisbane River; and

Each of the catalyst projects (except number 10 which is detailed in the Moreton Bay and Islands RTIIP) are canvassed below.

6.1.1 Nationally significant indigenous visitor attraction on South Bank

In spite of its focus as the state’s cultural hub by virtue of its high quality cultural facilities particularly on South Bank, Brisbane is noticeable for its lack of an indigenous cultural amenity. It is also noted that the only internationally significant indigenous cultural facility in Queensland is Tjapukai which is an interactive indigenous cultural attraction in Cairns.

With the significant ongoing growth of international flights into Brisbane in particular and the expected ongoing expansion of these over the next ten year period, the opportunity exists to capture a larger share of the international visitor market in particular. Whilst many of these leisure based visitors may have a beach and related Queensland experience as their primary reason for their visitation, they are also likely to consider visit nationally significant attractions which can add to the overall experience.

In addition, the ability to secure low cost airfares out of Sydney, Canberra, Adelaide and Melbourne in particular, continue to increase as aviation competition by low cost carriers continues. The ability to attract interstate visitors to nationally significant attractions in Brisbane is also far more likely than encouraging these markets to travel to Cairns, which is a further 2.5 hours flight further north than Brisbane.

In the absence of a nationally significant indigenous cultural attraction focussing on a wide range of indigenous themes, groups and moving away from a show culture the opportunity exists to create such a facility on South Bank.

The creation of such a facility would help to strengthen South Bank’s position as one of the leading cultural precincts within the country.

The proposed indigenous visitor attraction should also act as the hub for the identification of specific indigenous tourist experiences throughout Queensland. That is, interactive displays should highlight where other experiences are located, and provide details of tourism operators who offer tours and other intermediaries who can assist.
In addition, the visitor experience could extend to other groups including south sea islanders who have had a significant impact on the social and economic fabric of many communities historically in Queensland particularly associated with providing indentured labour.

A careful balance needs to be obtained to avoid trying to compete as a cultural theme park with major theme parks already on the Gold Coast for example as well as avoiding being a traditional cultural centre which market research indicated that there is little domestic market appeal for. Importantly, the attraction needs to have appeal as strongly to a domestic market as well as to international visitors if it is to provide commercial returns in specific areas. The consultants note that such a facility-attraction would need to be a publicly funded facility though a number of commercial income streams may be able to be developed to lease to private sector operators.

The consultants also note that the state government is shortly to launch the indigenous tourism strategy. Many of the initiatives identified in that strategy require far greater communication and liaison between main stream tours operators and indigenous communities. The indigenous visitor attraction proposed could provide a base to assist with forging partnerships, with providing training initiatives and which create potentially ease of access for inbound tour operators and overseas tour wholesalers looking to link to indigenous product opportunities being developed or operational throughout the state.

To particularly appeal to domestic visitors (intra and interstate) a higher level of technology including multimedia experiences are likely to be required. Ultimately, the indigenous attraction must be of such appeal that it becomes a must see visitor attraction for Australians as much as for international visitors.

### 6.1.2 Aquarium and marine discovery centre attraction

Whilst a number of cities including Sydney and Melbourne have major aquarium attractions, the unique marine life associated with Moreton Bay as well as areas north could provide a clear point of differentiation.

As part of a sophisticated development on the Brisbane River frontage to complement the other developments being investigated by Brisbane City Council, a marine discovery centre and aquarium attraction could offer:

- a strong connection to the experiences one can have within Moreton Bay and around the Moreton Bay islands;
- could provide themed food and beverage outlets (under water bar etc);
- could provide facilities to encourage tour bookings out to Moreton Bay for day experiences including whale and dolphin watching, dugong tours etc;
- could act also as the base for a variety of tour experiences to specific sites within Moreton Bay and villages; and
- could also have educational and scientific components associated with breeding programs for endangered species and behind the scenes educational tours for students of all ages.

The attraction could operate, based on those developed in other locations on a commercial basis with a leaseback arrangement to a highly experienced major attraction operator.

Importantly, the attraction would provide a child friendly visitor experience as well as appealing to a variety of adult markets.

The attraction will also have appeal to the attendees of conferences, conventions and their partners looking for add-on experiences to increase visitor satisfaction and length of stay in Brisbane.
6.1.3 Story of Brisbane at Mt Coot-tha

Mt Coot-tha is the highest point within easy proximity of Brisbane city and provides expansive views of the city and out towards the Scenic Rim, Gold Coast, Moreton Bay and Islands. The summit of Mt Coot-tha provides an opportunity for a viewing platform and an internal visitor attraction to explain the story of Brisbane.

There are obviously historic themes which can be developed reflecting on how the city’s social and economic fabric was developed as well as providing links to the greater Brisbane region to encourage visitor dispersal.

Currently, there are limitations on the number of tour buses and other vehicles able to park close to the summit which could make any expansion of visitor use problematic from a traffic management experience during busy periods.

The opportunity does exist to create a high quality and environmentally sensitive-sky rail from the botanical gardens at the base of Mt Coot-tha to the summit. This could provide an opportunity for addressing any traffic management problems by encouraging tour buses as well as free independent travellers to park at the botanical gardens base and utilise the sky rail for a one-way or two-way ride experience. In addition a series of attractive walkways could be developed providing an alternative experience from the summit back to the botanical gardens.

An additional opportunity, to assist in developing this area of the city as a must see attraction, could be to incorporate either a flying fox or luge experience to appeal primarily to a local and regional market and secondly to visitors.

The botanical gardens (including the observatory) currently appear to be somewhat under-utilised and the development of a sky rail as a conduit linking the summit to the botanical gardens could provide a welcome boost for visitor activity and utilisation.

In addition, there are likely to be a number of income stream opportunities for private sector concession operators as well as potential private sector investment into elements of hard infrastructure (sky rail, interactive visitor experience telling the story of Brisbane at the Summit, etc)

Because of existing multiple ownership (Federal, State and Council ownership) surrounding Mt Coot-tha the attraction experience may need to be investigated as a public-private partnership opportunity.

6.1.4 Development of Brisbane River Piers

Currently, there are a number of piers on the Brisbane River allowing access to the river cat services in particular. To enhance the Brisbane River experience it is also suggested that:

- an interpretation centre and ferry booking facility be established at an expanded Eagle Street pier; and
- an expanded pier facility be created at North Shore as a potential link point for those staying in commercial accommodation within the north shore precinct, as an alternative transport link to the airport and as a stopping off point to the suggested major Brisbane ferry terminal to Moreton Bay.

The opportunity exists to create a far stronger link between Brisbane’s CBD and the experiences one can have in Moreton Bay. It is not possible however to easily take one style or type of vessel from the Eagle Street pier into Moreton Bay due to the difference in river and sea conditions.

There also needs to be a facility to act as an anchor as the CBD staging post to help encourage visitors to undertake a day excursion or for longer periods out into Moreton Bay. As such, a redeveloped Eagle Street Pier could also provide:

- high quality visitor information services encouraging use of the Brisbane River in particular but also access to Moreton Bay;
- booking facilities for the various commercial ferry operators out into Moreton Bay as well as accommodation providers on the islands;
- dioramas of Moreton Bay indicating travel times, sea conditions, and transport operator options; and
- separate locations for handling commuter travellers, free independent travellers and small parties-groups and a separate area for larger structured tour groups.

A redeveloped Eagle Street Pier may need to cater for additional berthing facilities as well as pickup and drop off areas for coaches, mini buses, taxis and private vehicles as part of seamless travel and offering a fully integrated terminal.

A river pier at either Portside or North Shore Hamilton provides an opportunity to promote commercial accommodations options as well as the various cafes and restaurants which North Shore already provides. It is envisaged that in the future, the current Brisbane cruise terminal may need to be relocated from North Shore closer to the river mouth to cater for larger cruise vessels unable to navigate sufficiently downstream to North Shore due to their size and scale.

North Shore or Portside riverfront pier should also have an area dedicated to visitor information and could potentially provide an alternative, if not slightly novel, circuit for those looking at a river and taxi transport option for getting to Brisbane Airport.

6.1.5 Future relocation of Brisbane’s cruise shipping terminal

Research, as well as recent examples, indicates that the capacity to cater for the growth of cruise ship activity is dependent on having berthing and related infrastructure able to cater for larger vessels. The continuing increase in cruise ship activity along the eastern seaboard of Australia provides an excellent opportunity for Brisbane to build a dominant position as a major cruise terminal location.
5 Investment opportunities

To achieve this however Brisbane is likely to need a facility closer to the entrance to the Brisbane River rather than the current location as part of integrated urban development at Portside. Whilst the existing facilities are relatively new, there are limitations on its ability to cater for larger vessels. As such, the ability of Brisbane to hold its position as a cruise ship destination with the associated high yielding visitors associated with this niche market could be compromised.

A purpose built cruise terminal facility may need to be contemplated for the medium term with facilities to provide for:

- the next generation of cruise vessels including changes in the size and scale to many current vessels;
- the need to provide high quality customs clearance and immigration facilities which reflect the sophisticated nature of a global city which welcomes this niche market;
- seamless transport connections which allow visitors to board and disembark with ease and in comfort; and
- the need to offer shore side dining and refreshment options as well as easy and close proximity to taxi and coach services for seamless tour experience and visitor services.

6.1.6 New 5-6 star hotels within Brisbane CBD

There are a number of new major high quality hotel projects proposed for the Brisbane CBD. A number of these have been proposed for the last 2-3 years and are delayed because of construction and development costs significantly impacting on investor returns, the difficulty in securing appropriate sites and the inability to achieve average room yield to generate an attractive enough return on investment.

Whilst development approval has been granted to a few hotel projects (which are often part of a mixed yield development) profitability challenges have so far delayed construction. Some of these developments are forecast to be operational by 2011. Feedback from the private sector indicates a need for height and density concessions to be granted by the Council, in order for the first 1-2 hotels to gain momentum for investment. There could also be further rebates offered on statutory charges and concessions on gross floor area, over and above the 35% discount on charges already offered from Council. Such rebates are currently estimated to be worth $20 to $50 million over the next few years.

In addition, a number of mid-range hotels have also been planned but so far have yet to come to fruition as well.

Consideration may need to be given to offering public land sites for major high quality hotel projects to overcome the current impasse. Possible areas identified for this include Victoria Park which has the added bonus of being adjacent to a public golf course, very close to the CBD and with expansive views to the surrounding areas and the possibility of a major hotel site within the north bank development. Sites identified also include Carrilpa Point, Howard Smith Wharves and Newstead River Park.

Based on the consultants’ assessment of forecasted visitor growth for the Brisbane Region out to 2018, an estimated additional 3,542 new rooms will be required. The bulk of these (3,000+) are required for Brisbane City with the majority within the CBD if at all possible. Unless new room stock is able to be introduced within the medium term there is a real risk that the leisure market will struggle to grow due to lack of accommodation and plans including the accommodation proposed within the Brisbane Airport precinct may fill the vacuum but with a more mid-range hotel product.

There is also an on-going risk that challenges associated with developing and constructing fully serviced hotels will result in the continuing growth of lower cost, but more profitable serviced apartment hotel facilities. Whilst these are already highly prevalent in Brisbane and provide an important accommodation option, they are limited in their appeal to a number of markets.

There is therefore a risk that unless Brisbane can encourage further higher quality all service hotels to be developed and constructed its positioning will be constrained by the lack of major internationally branded higher quality hotel chains and their often loyal customer following.
A dedicated high quality walking trail has the potential to:

Brisbane City & Hinterland to redevelop the Toondah Harbour area to better cater for Toondah Harbour in Cleveland in particular. Without the ability current constraints associated with the ferry operations out of Bay Islands from the Brisbane River. This should help alleviate As identified by Invest Brisbane the opportunity exists to

6.1.9 Integrated Moreton Bay terminal on Brisbane River

As identified by Invest Brisbane the opportunity exists to create a high quality ferry terminal servicing all of the Moreton Bay Islands from the Brisbane River. This should help alleviate current constraints associated with the ferry operations out of Toondah Harbour in Cleveland in particular. Without the ability to redevelop the Toondah Harbour area to better cater for tourism, commuter and industrial ferry-shipping needs: opportunities to improve access to Moreton Bay will be restricted for the future. Ideally, a single operator or agency would take control of Toondah Harbour and develop a workable master plan to meet the needs of industry and other stakeholders. The multiple land ownership however makes this outcome problematic at least for the short-medium term.

The limitations of existing ferry terminal facilities on the mainland to access Moreton Bay Islands will continue to be an ongoing constraint. Whilst alternative sites already provide access for commuter travel particularly to islands where residential enclaves exist, they provide limited benefit for growing the visitor markets. Within this context, a purpose built and high quality ferry terminal within the Brisbane River is suggested. Such a facility would need to cater for:

- a number of ferry operators offering both passenger only and vehicle and freight vessels;
- should offer berthing facilities for whale watching and other marine tour based vessels;
- provide a transport interchange which provides the interface for seamless connections from river cats and other vessels bringing passengers from the CBD and other locations;
- offering seamless connection between tour coaches, mini buses and private vehicles including secure parking etc; and
- offers appropriate interpretation material and visitor information on Moreton Bay in general and specific locations.

Such a development would need to involve the Port of Brisbane whose support for such an initiative would be of paramount importance.

When considering the catalyst projects for Brisbane, it is important to consider that Super-yachts are a growing and lucrative market and would benefit from a number of catalyst opportunities, such as the future relocation of Brisbane’s cruise terminal and the Moreton Bay integrated terminal. The progression of such projects will align with the Department of Tourism, Regional Development and Industry’s Super-yacht Strategy.

6.2 Infrastructure limitations

Tourism investment growth could be held back unless issues identified to the consultants by infrastructure agencies and the regions’ stakeholders are addressed.

Specifically, in regard to infrastructure issues, there appears a need:

1. for a major integrated transport policy and plan for Brisbane. This needs to cover: heavy rail, light rail, ferries, buses, cycleways, pedestrian trails, roads, motorways and bridges;
2. to provide land assistance for major 5-6-star accommodation facilities to be built in the CBD;
3. to improve the supply of telecommunications services to the regions including telephone line coverage and broadband internet coverage;
4. to ensure regular electricity supply provision in the hinterland;
5. to ensure sufficient water for Brisbane City (e.g. Lake Wivenhoe is the principle waterway of supplying Brisbane, it is still very low); and
6. for improved transport options, both public (buses, rail) and private (better roads) in the hinterland.

6.2.1 Brisbane master plan for transport and tourism

There are 35 listed projects in the 2006 update of the SEQ Infrastructure Plan and Program for Greater Brisbane Transport Infrastructure. The majority are proposed for delivery by 2015 and if they are delivered on time will have positive impacts for the visitors to the city and surrounds.

Other key initiatives to consider are:

The growth in visitor numbers as a result of the second runway at Brisbane Airport28 requires major improvements to both road and rail between the airport and the CBD. It will be important that infrastructure overhaul is completed at the same time as the runway becomes operational.

New bridges over the Brisbane River for pedestrians and cyclists (as well as cars and rail) will benefit visitors as well as residents. It will encourage more time to be spent above, on and near the water and help remove any barrier that the river may have historically created between precincts.

As the new transport infrastructure comes online, tourism organisations will need to work closely with Department of Main Roads and Brisbane City Council on signage. Better utilisation, safer and more satisfied visitors can only occur if all the new bridges, roads, cycleways, buses and trains are clearly referenced and sign posted and also clearly and easily inter-changed.

The Roma Street Transport Interchange will need to cater for charter and scheduled bus-coach and mini bus needs with seamless link into rail and taxis. There should also be a people mover – either a tram or light rail option to connect up tourism precincts and nodes. Future coach, bus, and minivan parking bays at the major Roma Street Transport Interchange need to be increased to cater for tourism growth.

There needs to be a CBD city cat terminal with a range of visitor services, operator desks, cafes etc north of Eagle Street Pier. There needs to be a ferry terminal to Moreton Bay islands. The cruise terminal needs to be relocated by 2018 downstream so that larger cruise ships can be catered for and to address the height constraint of the Gateway Bridge.

6.2.2 Land availability for 5-6 star accommodation in Brisbane

Without assistance from potentially both Brisbane City Council and State Government land holders, ongoing delays in getting major hotel projects may continue. Assistance is needed to free up sites for potentially mixed use development including major hotels which can offer internationally recognised 5-6 star brands.

Consideration needs to be given to:

- government releasing crown/state land at competitive rates or long term lease arrangements specifically to developers who will agree to build 5-6 star accommodation;
- state Government and Brisbane City Council need to be considering offering tax relief such as accelerated depreciation of hotel assets,
- consider setting a special rate for Development Assessment Fees to encourage developers to consider hotels rather than other commercial or residential options; and
- offering rates holidays and other forms of user charges assistance.

6.2.3 Improving the supply of telecommunications services

It is understood that the hinterland has unreliable supplies of telecommunications services, including: the supply of mobile phone coverage; the supply of broadband internet connections and the supply of landline services.

Telecommunication issues are a federal government issue, with levels of complexity.

Where possible it is suggested that local and state government, as well as industry groups articulate their concerns as frequently as possible. For an area so close to a capital city to have sporadic service, is not only a disadvantage for visitors, it is also a safety concern.

Capacity and other issues relevant to the supply of telecommunications services to the Brisbane region are canvassed at Table 9 in the Appendices Document that accompanies this RTIIP.

6.2.4 Permanent uninterrupted power supply in the hinterland

During the consultation process, feedback was received regarding energy outages in the hinterland. It is noted that the rapid growth in SEQ over the past decade has created challenges in maintaining sufficient energy for business and households.

As part of the SEQ Infrastructure Plan, there are a series of transmission upgrades that are due to occur between now and 2026. This includes a new sub-transmission line between Ipswich and Beaudesert and an upgraded transmission line between Toowoomba and Southport which carves through the Brisbane Tourism Region. There is also a proposal for an up-graded sub-transmission line which will run through the Lockyer Valley.

It is to be hoped that these new and upgraded supply distribution infrastructure will ensure that the Brisbane Region hinterland will have consistent uninterrupted power supply in the near future.

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28 “…Brisbane airport current handled 16-17 million passengers a year and this development would permit 23.5 million passengers a year by 2015 and 50 million a year by 2035”, Courier Mail, 18 September 2007
6.2.5 Sufficient water supply for Brisbane region

The Brisbane Region falls within the most restrictive water supply region for Queensland. SEQ has been on level six water restrictions since 23 November 2007 as dam levels continued to drop as the drought has continued. As a result of years of relentless pressure regarding future water supplies, dams, recycling and desalination plants, the State Government has announced a series of initiatives for ensuring water supplies in the state are sufficient for the projected population through to 2030.

In the Brisbane Marketing region this means:
- Demand on Wivenhoe Dam supplies will be reduced through recycling measures;
- Potential new desalination plants suggested for Lytton in Brisbane and one each on Bribie, North Stradbroke and South Stradbroke islands;29
- Cedar Grove Weir on the Logan River was substantially complete by the end of 2007 (including having a fishway operational) – providing water to Beaudesert and surrounds; and
- Future tourism developments, especially accommodation, should follow the new sustainability schemes for water and waste water use.

6.2.6 Transport strategies for the Brisbane hinterland

As drive tourism is the primary market sector for the Brisbane Region (Scenic Rim, Lockyer Valley and Somerset) it is vital that the roads in the region are of a suitable quality in order for visitors to have a safe and pleasant trip. The consultants note that as part of the SEQ Infrastructure Plan and Program, the following initiative is proposed which will assist visitors to have a better experience.

Ipswich Motorway:
This project is considered for urgent improvement. However, it is also subject to AusLink Network Funding, so pressure may be required in order for this to be considered a priority for action.

Other highways that need attention include Mount Glorious, passing lanes for the Mt Mee Road and other major link roads in the Pine Rivers district and higher quality roads in the Scenic Rim which would link the towns and natural attractions more easily.

Given the natural landscapes in the Brisbane Region, there is a need for lay-bys to be built on a number of highways, so that visitors can safely stop to admire the views.

In order to preserve the heritage and character of the hinterland towns, bypasses are required in Beaudesert, in order that visitors can enjoy the removal of heavy traffic movements.

Brisbane-Ipswich Passenger Rail Service:
It is proposed that improvement to the infrastructure may occur by 2015. As part of the tourism initiatives proposed for Ipswich and beyond, this should be a priority for development.

6.3 Additional infrastructure and investment projects

Additional infrastructure projects canvassed in this RTIIP include projects to:
1. secure skilled and semi-skilled staff;
2. develop new attractions and activities to generate longer lengths of stay;
3. expand the number of and upgrade the accommodation facilities catering to leisure and business visitor markets; and
4. introduce a public process for dealing with infrastructure delays.

6.3.1 Secure skilled and semi-skilled staff

Brisbane City and the hinterland are suffering from an acute labour shortage for hospitality and tourism sectors. The Queensland Government has recognised that low skills throughout the labour force are a serious impediment to providing quality service30.

Integral to this RTIIP, but being prepared separately, is a Training Activity Plan. The findings and actions from that report will interrelate to the two RTIIPs with projects being run concurrently to ensure success and synergies.

6.3.2 New attractions and activities to generate longer lengths of stay

At Tables 8-16 in the Appendices Document that accompanies this RTIIP, a number of new investment opportunities that are planned for or that have been suggested to the consultants for consideration are canvassed.

The list of projects which follow have been clustered according to eight themes.
1. Food and produce including retailing and processing.
2. Financial and political recognising that Brisbane is the capital of Queensland.
4. Business and convention facilities to attract conferences, meetings etc.
5. Environment including access to National Parks and waterfront areas for passive and active pursuits.
6. Heritage features which need preserving and profiling.
7. Sport and leisure facilities to assist with expanded recreational options.
8. Supporting major infrastructure.

29 Desalination, recycling for SE Qld, The Australian, 27 March 2008
30 Queensland Skills Plan, Queensland Government, March 2006
### Table 5: Potential investment projects for the regions

<table>
<thead>
<tr>
<th>Brisbane City (not in order of priority)</th>
<th>Brisbane Hinterland (not in order of priority)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food and Produce</strong></td>
<td><strong>Food and Produce</strong></td>
</tr>
<tr>
<td>- Developing small attractions such as cheese factories, lavender farms, cider house, chocolate factory</td>
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<tr>
<td>- Develop a scenic lookout with restaurant on top</td>
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<tr>
<td>- Coolana Olives retail shop and outlet for other locally made produce (Minden, Esk Shire)</td>
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<tr>
<td>- Farm gate/food tour experience at Forest Hill (linked into gourmet cafes and country pubs in the town)</td>
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<tr>
<td>- Create Gatton and Laidley (Das Neumann Haus) Gourmet Food Centre – gourmet (venison) pies, Gatton potatoes, jam and cream</td>
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<tr>
<td>- Warrego Highway information centre – showcasing the premium food products of the Lockyer Valley</td>
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<tr>
<td><strong>Financial and Political</strong></td>
<td><strong>Financial and Political</strong></td>
</tr>
<tr>
<td>- Media Industry Park and Australian Television Museum Centre at Newstead</td>
<td></td>
</tr>
<tr>
<td>- Consider a visitor centre and / or conference centre built in conjunction with public facilities such as a public library or sports centre – the Apex Lake information centre in Lockyer Valley</td>
<td></td>
</tr>
<tr>
<td>- Develop a viewing platform at Kooralbyn with views back to Mount Barney etc., including, interpretation boards to show the outline of the mountains and what each of them are on the scenic rim, to point out where the direction of various places such as the Gold Coast and Brisbane and places further afield, and potentially to offer some seating and undercover picnic sites</td>
<td></td>
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<tr>
<td>- Amberley Air Force Base which is growing significantly</td>
<td></td>
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<tr>
<td><strong>Water – Aquatic based</strong></td>
<td><strong>Water – Aquatic based</strong></td>
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<tr>
<td>- Aquarium with an educational focus and research and development emphasis as well</td>
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<tr>
<td>- Whale-watch tours – evaluate number of operators with EPA</td>
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<tr>
<td>- Brisbane-Ipswich Cruise</td>
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<tr>
<td>- Building of more jetties and pontoons to allow greater opportunities for boating activities (public and private)</td>
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<tr>
<td>- Non-motorised water sports facility as part of the rehabilitation of sand mining operations in Oxley Creek</td>
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<tr>
<td>- The river is a major asset for Ipswich. Develop boat trips for both visitors staying in Ipswich and for journeys down or up to Brisbane</td>
<td></td>
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<tr>
<td>- White water recreation destination at Esk – rafting, canoeing etc.</td>
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<tr>
<td>Brisbane City (not in order of priority)</td>
<td>Brisbane Hinterland (not in order of priority)</td>
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<td>----------------------------------------</td>
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</tr>
<tr>
<td><strong>Business and Conventions</strong></td>
<td><strong>Business and Conventions</strong></td>
</tr>
<tr>
<td>- Use Melbourne as an example of the approach a capital city may take in identifying the types of events to attract and focus on.</td>
<td>- Encouraging higher quality resort, hotel and lodge style accommodation capable of hosting small meetings and events (weddings, etc).</td>
</tr>
<tr>
<td>- Attract unique events that Brisbane can better cater for e.g. sub-tropical related</td>
<td>- Ipswich Railway Workshops multi function facility and conference venue (1,000 pax) and new accommodation facility via retrofitting old railway workshop buildings.</td>
</tr>
<tr>
<td>- Events that project and build upon the brand of Brisbane</td>
<td></td>
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<tr>
<td><strong>Environment/ Parks and Green Spaces</strong></td>
<td><strong>Environment/ Parks and Green Spaces</strong></td>
</tr>
<tr>
<td>- Roma Street Parklands</td>
<td>- Nature-based water recreational parks on the Mid-Brisbane River in Somerset RC</td>
</tr>
<tr>
<td>- Eden Gardens project</td>
<td>- Wellness retreats in areas such as Woodford</td>
</tr>
<tr>
<td>- Walkabout Creek Visitor Centre at Brisbane Forest Park</td>
<td></td>
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<tr>
<td>Connect with Nature</td>
<td></td>
</tr>
<tr>
<td><strong>Heritage</strong></td>
<td><strong>Heritage</strong></td>
</tr>
<tr>
<td>- Indigenous attraction</td>
<td>- Ipswich is the historic capital city of Queensland. It is rich in heritage with large Indigenous communities. Its history and culture reflects industrial mining particularly the Welsh connection</td>
</tr>
<tr>
<td></td>
<td>- Ghost tours at the old mental asylum building (now part of UQ campus)</td>
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<td></td>
<td>- Royal Heritage Interpretive Centre (Red Deer) at Toogoolawah</td>
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<td></td>
<td>- Australian narrow Gauge Railway Museum at Woodford</td>
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<tr>
<td></td>
<td>- Historic railway experience at Rosewood</td>
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<tr>
<td></td>
<td>- Cultural tourism link to performing arts school and keep on building on arts based festival</td>
</tr>
<tr>
<td></td>
<td>- Preserve and restore old buildings at Kalbar and use as base to access Wyaralong Dam</td>
</tr>
<tr>
<td><strong>Sports and Leisure</strong></td>
<td><strong>Sports and Leisure</strong></td>
</tr>
<tr>
<td>- Water sports activities for the river</td>
<td>- Water sports activities on the lakes, dams and rivers</td>
</tr>
<tr>
<td>- South Bank attraction</td>
<td>- High profile for the motorsport precinct within Ipswich including the creation of an “awesome foursome” package. Race a racing car around the motor sports circuit, fly in a jet from Amberley, go on a jet boat potentially on the Brisbane or Bremer Rivers which run through Ipswich and drive one of the trains at the Ipswich Railway Workshops (there is a simulator for the tilt train)</td>
</tr>
<tr>
<td>- Create a flying fox attraction from Story Bridge</td>
<td>- Adventure based tourism; both mountain activities and lake/dam/river activities e.g. Glen Rock Mountain Bike, and walking (Lockyer Valley), mid-Brisbane River (Somerset region) and Wyarralong Dam (Scenic Rim)</td>
</tr>
<tr>
<td>- Bigger festivals and events calendar, utilising South Bank development</td>
<td>- Enhance the motorbike riding centre and motocross trail network (Gatton and Ipswich)</td>
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<tr>
<td></td>
<td>- Development of Gatton Equine Event Centre</td>
</tr>
<tr>
<td><strong>Infrastructure</strong></td>
<td><strong>Infrastructure</strong></td>
</tr>
<tr>
<td>- Building a look-out at Mount Coot-tha with sky rail option</td>
<td>- Improve the freeway interchanges around Ipswich and ensure signage for exiting into the city is clear</td>
</tr>
<tr>
<td>- Expansion of South Bank area</td>
<td>- Build lay-bys on highways in order for drive tourists to be able to stop and enjoy rural and rim vistas</td>
</tr>
<tr>
<td>- Connectivity (transport links) between attractions and precincts</td>
<td>- Ensure the river at Ipswich is capable of navigation from Brisbane by power boat, canoe and paddle steamer</td>
</tr>
<tr>
<td>- Creation of a Riverside tourist precinct</td>
<td>- Visitor information centres and/or interpretative boards in hinterland towns</td>
</tr>
<tr>
<td>- Major accommodation (Sistar hotels) and convention hotel</td>
<td>- Signage as part of Rainforest Way Strategy (see Scenic Rim Tourism Action Plan)</td>
</tr>
<tr>
<td>- Riverside boating precinct</td>
<td>- Beautification program for the towns of the Scenic Rim and Ipswich City (lighting, street planting, heritage furniture etc)</td>
</tr>
<tr>
<td>- Light Rail / Mass Transit to link precincts e.g. Houlton Jarvis Street and the Valley</td>
<td>- Train station beautification at Ipswich</td>
</tr>
<tr>
<td>- World class staff who understand the service culture (soft infrastructure concern)</td>
<td>- Major investment required in all types of accommodation provision. Upmarket hotels and eco-resorts and spas (similar to Peppers Hidden Vale or Spicers Peak), motels, caravan parks, farm stays, backpackers, B&amp;B</td>
</tr>
<tr>
<td></td>
<td>- Accommodation needed in towns, Ipswich and specific rural locations e.g. At the dams and on (and in) the edge of National Parks.</td>
</tr>
</tbody>
</table>
6.3.3 Land use planning

The Brisbane Region has experienced rapid population growth over the last ten years with growth rates reflecting some of the highest levels in the State and nationally. As a result, infrastructure in its various forms has struggled to keep up and land use planning has often had to juggle with competing and equally important economic uses.

Tourism requires careful land use planning and more often of a prescriptive nature to get the best outcomes. That is, Council planning schemes at the local level ideally need to specify where tourism developments will be encouraged and complementary land uses such as general retail, food and beverage outlets and entertainment centres etc.

Brisbane City needs to encourage the careful master planning of its river frontage to encourage the quality of tourism development it wishes to see. Tourism works best when it is clustered so that businesses can leverage of neighbouring activities and pedestrian flows. The city also needs to consider how best to utilise the river as not just a commuter transport resource, but as a powerful attraction in its own right for visitors to garner a great city experience on.

Any expansion along the river or at the mouth or the city port must include land use planning which will appropriately separate industrial from passenger use. Facilities including pedestrian walkways, river side accessibility, toilets and parking for visitors should be included in any river development.

An increasingly extended and attractive CBD skyline should allow for the development of wine bars and dining establishments on office terraces. Planning laws should be amended to allow for such opportunities (together with al fresco pavement dining).

With continued pressure on rural areas for development, open space care is needed to avoid over development in pristine hinterland areas of the entire Brisbane region. Especially in areas of national parks and key world heritage sites, the recommendations for development are subtle, limited in size and quality design built structures only.

Any development in the hinterland regions should take careful consideration of the landscape and existing design to deliver high quality and appropriate infrastructure, sympathetic to and in keeping with historic and older buildings.

Every effort should be made to preserve and reuse buildings and facilities of a heritage nature (residential, industrial, office etc) which retain the history of the hinterland areas. Though older buildings have become prized and appreciated in more recent times, their values as key tourism assets is often overlooked especially in rural areas where their cost of maintenance is seen as too high.

Vistas and view shafts are also important components for tourism whether associated with country drive circuits or in township areas for pedestrian walks and trails.
As indicated earlier, there are more than 80 investment opportunities which have been considered by the consultants in the course of preparing this RTIIP. They are canvassed at Tables 9-17 in the Appendices Document that accompanies this RTIIP.

The investment projects have been assessed against the following criteria:

- strong level of interest amongst local stakeholders;
- Local Council support;
- infrastructure constraints manageable or resolvable in reasonable time frame;
- project supports the RTO vision for the region;
- project will address issues such as lack of attractions;
- commercial investment opportunities possible in part or in whole;
- State Government agencies not actively opposed.

The projects canvassed in the table cross into a number of sub-sectors of the tourism industry.

Table 6: The tourism industry sub-sectors – Investment projects

<table>
<thead>
<tr>
<th>The Sub-Sector</th>
<th># of Projects</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure</td>
<td>12</td>
<td>14.45%</td>
</tr>
<tr>
<td>Superstructure</td>
<td>2</td>
<td>2.41%</td>
</tr>
<tr>
<td>Attractions and activities</td>
<td>37</td>
<td>44.59%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>12</td>
<td>14.45%</td>
</tr>
<tr>
<td>Across the Sector – Strategic Planning</td>
<td>2</td>
<td>2.41%</td>
</tr>
<tr>
<td>Transport and related services</td>
<td>5</td>
<td>6.03%</td>
</tr>
<tr>
<td>Across the Sector – Human Resources</td>
<td>2</td>
<td>2.41%</td>
</tr>
<tr>
<td>Across the Sector – Marketing</td>
<td>9</td>
<td>10.84%</td>
</tr>
<tr>
<td>Across the Sector – Community</td>
<td>2</td>
<td>2.41%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>83</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

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31 Within the 83 listed projects which have been assigned a costing, some have multiple investment opportunities.
To ensure that the vision for the Brisbane region is realised, many of the investment opportunities and infrastructure projects referred to in this RTIIP will need to be implemented by 2018. To ensure the effective and timely implementation of tourism investment opportunities a structure for driving the process is recommended below.

8.1 Action group and working groups

To ensure the implementation of the recommendations in this Plan, it is suggested that an Action Group be formed to oversee the development and pursuit of an implementation schedule.

- Ideally, the Action Group would be a public-private partnership, particularly given the need for a whole-of-government approach for many infrastructure projects.
- Government and private sector participants in the Action Group will, ideally, be represented by senior personnel only, including Local and State Government representatives, TQ and Brisbane Marketing (or their nominees).
- The Action Group must aim to achieve tangible outcomes in the short and medium terms (next 3 year period).
- The Group should be supported by smaller working groups which will oversee the development and implementation of specific projects on a geographic basis.
- The regions’ RTOs will provide secretariat assistance to the Action Group: organising meetings; recording minutes of meetings; distribution of minutes of meetings and preparing press releases and other documentation etc.

8.2 An implementation strategy

One of the first steps for the Action Group should be to develop an implementation schedule for overseeing the commencement and progress of infrastructure projects canvassed in this RTIIP.

In the least, the schedule should detail:

- the priority order in which infrastructure projects should be approached;
- the likely stakeholders in the projects’ completion;
- a preliminary list of potential investors in the projects;
- an indication of the timing of the projects;
- an indication of the steps the Action Group will need to take to get the projects off the ground;
- the likely make up of any supporting working group;
- a determination as to whether a feasibility study is likely to be required; and
- performance indicators for the Group’s role in the development and implementation of the projects.

The Action Group and the working groups need to be integrated into the proposed implementation process for the Queensland Tourism Strategy. The Action Group could be a sub-group of the Destination Action Group for the region, as illustrated below.

Table 7: The working and action groups
Appendices

Appendix 1: Investment projects proposed ..................................................................................... 33
Table 8: Infrastructure projects – Sectoral analysis

<table>
<thead>
<tr>
<th>Infrastructure Project</th>
<th>Background</th>
<th>Opportunities</th>
<th>Issues</th>
<th>Conclusions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Air access to the region (Brisbane and environs)</td>
<td>Major airport expansion including second runway at Brisbane Airport Increase capability of airstrips in region to cater for new markets Each of the regional airstrips need to have runway upgrades in the short term</td>
<td>Cementing Brisbane’s position as one of the three major gateways into Australia for the medium – long term To improve air access to the region Capitalise on high yielding markets looking to fly into regional locations for day spas, national park bush trekking, island experiences etc Air events including races etc around region Need to offer alternative to drive or ferry travel for time poor travellers</td>
<td>$2.5b 2nd runway expansion at Brisbane to be complete in 2015. Capacity increase in passenger numbers from 17.5m in 2006/07 to 25m in 2014 by 2015. Need to ensure city and hinterland ready to manage the dissemination of increased visitor numbers Kooralbyn airstrip needs realising North Stradbroke airstrip needs all weather surface for short break and day trip options ex Brisbane Caboolture airport needs expansion to cater for aircraft restoration, maintenance and greater utilisation Road link to Brisbane Airport often heavily congested and need for longer term roading solution</td>
<td>It is the long-term strategic plan of Brisbane Airport Corporation (BAC) to harness the natural advantages of Brisbane Airport to create Australia’s first Airport City. Kooralbyn Resort needs to find partners to upgrade the airstrip for use by light aircraft and as racing strip for car club days (at time of printing Kooralbyn Resort was in liquidation) North Stradbroke airstrip needs all weather surface and increase to parking bays to cater for future air races, and other events etc Caboolture Airport to offer base for (joy rides, light aircraft training, major restoration programs and enhanced aviation museum</td>
</tr>
<tr>
<td>2 Development of major airport business precinct at Brisbane</td>
<td>Airport expansion due to competitiveness for offering logistic and airfreighting services and storage and catering to growth in low cost carriers etc</td>
<td>Upgrades to terminal facilities, expanded business park with light industrial aviation related development, hotel – commercial accommodation complex with meeting and small conference facilities Option of holding meetings etc at airport precinct rather than within the CBD especially for intrastrate and interstate business travellers Over night accommodation for transiting leisure travellers</td>
<td>Potential risk that a highly successful business precinct will compete with CBD meeting venue and hotels for business travel Strategic location of airport near major motorways could provide impetus to avoid Brisbane CBD for leisure travellers transiting or over nighting and heading further afield.</td>
<td>Brisbane Airport City will be a 24-hour global trade and commerce centre blessed with the space and capacity to plan for growth in a curfew-free, strategically-designed and ideally located environment. Need for more hotels and meeting venues in Brisbane Airport precinct provides additional needed infrastructure Need for high quality road network and high speed rail connections to the city from the airport to help position Brisbane as a true global city.</td>
</tr>
<tr>
<td>3 A creation of a new international quality cruise terminal facility</td>
<td>Significant growth in cruise ship visits has occurred in last few years That growth is expected to continue on the proviso that berthing and related infrastructure can meet the needs of the next generation of cruise vessels The current cruise terminal at Portside is part of a multi-use development and is restricted in its capacity Larger cruise vessels are unable to navigate under bridges over the Brisbane River and therefore need to be closer to the river mouth</td>
<td>To create a purpose built dedicated cruise ship terminal which could potentially be part of a major Moreton Bay ferry terminus as well Ability to significantly grow the cruise ship market into Brisbane Opportunity to create seamless transfer from cruise ship to sea bound ferry for excursions into Moreton Bay (whale watching etc) Address current issues concerning improved Customs and Immigration clearance, access to tour buses and taxis etc</td>
<td>The location of the existing cruise ship terminal will restrict growth in this high yield niche market Negotiation required with Port of Brisbane for dedicated cruise facility terminal and challenge of agreeing ideal location 21st century cruise customers are demanding more. Ship builders have been able to provide more for discerning guests by building ships higher rather than wider. Brisbane will be bypassed as more new ships come online.</td>
<td>Whilst the current cruise ship terminal is relatively new the negative publicity which Brisbane has received over the last 12 months relating to its inability to cater for larger cruise vessels needs to be addressed As a city with aspirations to position itself as a global city of significance, high quality cruise ship facilities are required</td>
</tr>
</tbody>
</table>
### Table 8: Infrastructure projects – Sectoral analysis cont.

<table>
<thead>
<tr>
<th>Infrastructure Project</th>
<th>Background</th>
<th>Opportunities</th>
<th>Issues</th>
<th>Conclusions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4</strong> Major ferry terminal linking Brisbane CBD to Moreton Bay and Islands</td>
<td>Ferry access and activity restricted by infrastructure constraints and inability to create composite workable master plan for Toondah Harbour in Redland Bay. Need to grow access from Brisbane City to Moreton Bay through more direct route especially for interstate and international visitors</td>
<td>Work with Port of Brisbane to identify site for major ferry terminal including visitor information. Potentially to integrate ferry terminal as part of major cruise facility if complementary. Create tour booking services for those accessing Moreton Bay.</td>
<td>Visitor growth potential constrained by existing facilities and particularly location for accessing Moreton Bay. Existing facilities in Redland Bay in particular are able to cater for commuter needs and industrial/mining activity needs. Need for a higher quality visitor friendly ferry terminal facility as gateway to Moreton Bay. Lack of information and interpretation at existing wharf-access points on ecology of Moreton Bay and the need for appropriate sensitivity and care. Opportunities for encouraging incentive travel excursions, day trip excursions particularly from Brisbane CBD too limited by current location of ferry access and arrival points on the mainland.</td>
<td>Without a major new dedicated ferry terminal geared to the needs of visitors tourism interest (particularly international and interstate) in going out to Moreton Bay and the Islands is likely to be constrained. Growth potential of whale watching activities, general ferry services etc are likely to be constrained in growth by the lack of appropriate quality in a ferry terminal. There is an need to strongly link Moreton Bay to the Brisbane CBD and without a dedicated high quality ferry terminal and visitor centre this is unlikely to occur.</td>
</tr>
<tr>
<td><strong>5</strong> Ensuring ample water supply for the Brisbane Region</td>
<td>The region accesses water from the Wivenhoe Dam primarily. Current demand levels are estimated at ~183 kilolitres per person annually. It is forecast that water consumption must be reduced to 124 kilolitres per person annually by 2030, because of projected population increases. A further waterway and dam are proposed at Wyaralong in the Scenic Rim.</td>
<td>A need to actively encourage water recycling and particularly the reuse of appropriate grey water. The need to ensure that future tourism facilities (accommodation in particular) within the wider Brisbane Region have access to potable water.</td>
<td>With more recent rainfall over the last 3 month period the Wivenhoe Dam is estimated at 28% of its total capacity. Though the drought has officially broken after 7 years there lies the risk of further dry periods and a need for a different approach to water preservation and recycling.</td>
<td>Ensuring that tourism and other users have an adequate supply of potable water for the future. Noting that there is high level of water capacity on the Moreton Bay Islands due to a natural aquifer.</td>
</tr>
<tr>
<td><strong>6</strong> Improving the supply of telecommunication services particularly in remote parts of the region</td>
<td>Mobile phone coverage is unreliable in some Moreton Bay Islands and in some areas around the Scenic Rim. While ADSL connection to the internet is available in the region connection is often interrupted.</td>
<td>The need to improve the mobile phone coverage throughout the region. To improve the reliability of supply of ADSL internet services. To actively encourage wireless internet facilities in all new accommodation facilities etc.</td>
<td>Variable coverage of the region by mobile phones may impact on tourism: visitors travelling to the region will be inexperience if they cannot communicate for forward bookings or if they cannot reach home and the office. The inability to access the internet particularly on appropriate locations within Moreton Bay Islands as well as in parts of the wider Brisbane Region and Scenic Rim may limit business tourism growth and especially the meetings and conferencing markets.</td>
<td>Telecommunications within the region must be of high quality. As part of the capital city for the state and environs tele-communications should be first class. Fast and efficient Broadband for the entire region.</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Infrastructure Project</th>
<th>Background</th>
<th>Opportunities</th>
<th>Issues</th>
<th>Conclusions</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 Expanding the Brisbane Convention and Exhibition Centre</td>
<td>Convention Centre was opened in 1995. Existing space and facilities currently at capacity much of the time. Expansion will enable an additional 250 new events per year.</td>
<td>Ability to increase economic benefit from ~$140m per year to a much greater contribution to the city financially. Expansion will give the city an opportunity to bid for high end conferences with larger numbers of delegates.</td>
<td>The newly expanded facility is due to open in mid-2010; there will be a need to identify any labour or skills issues prior to that time, specifically in the areas of event and exhibition management, hospitality and generic customer service.</td>
<td>The new facility will make Brisbane comparable to the new Melbourne Centre. It will be the only centre in the country (as at May 2008) that will have three stand alone plenary halls, two ballrooms, three speakers’ presentation centres, six executive boardrooms and Australia’s first tasting room.</td>
</tr>
<tr>
<td>8 (Re) Development of two new Brisbane River Piers at Eagle Street and North Shore</td>
<td>The River has been utilised as a transport option for residents rather than visitors. Limited information for visitors who choose to use the river ferries currently.</td>
<td>Create a stronger link between the CBD and the waterways of Moreton Bay. Create the river as an experience for visitors.</td>
<td>Eagle Pier needs to be made more visitor-friendly through visitor information, booking facilities for other activities (especially Moreton Bay trips) etc. Create additional berthing facilities and car parking and drop off points for visitors. North Shore Pier to have an area dedicated to visitor information.</td>
<td>As additional hotels are constructed at North Shore, the river provides a transportation option for visitors. Economic benefits to the ferry companies through additional patronage.</td>
</tr>
<tr>
<td>9 Creation of lay-bys on the highways and roads through the 7 national parks in the Scenic Rim</td>
<td>Drive visitors do not have enough places in the Scenic Rim to stop safely and admire the views and vistas of the landscape and National Parks.</td>
<td>Creates a better and safer visitor experience. As a result, visitors are likely to stay in the area for a longer period of time.</td>
<td>Need to seek agreement and funding from the Department of Main Roads.</td>
<td>Enjoyment by visitors of rural and scenic rim vistas. Fewer traffic accidents. More pleasurable rural driving experience; more likely that visitors will tell others to undertake the driving route because it is easy to navigate.</td>
</tr>
<tr>
<td>10 Complete circuit link road from Kooralbyn to Boonah in Scenic Rim</td>
<td>Insufficient visitor driving routes through the Scenic Rim.</td>
<td>Creates more options for visitors. As a result, visitors are likely to stay in the area for a longer period of time.</td>
<td>Need to ensure funding is secured from Department of Main Roads and / or Scenic Rim Regional Council.</td>
<td>Creates a new circle route for the Scenic Rim. Provides options for repeat visitation.</td>
</tr>
<tr>
<td>11 Creation of horse trail and mountain bike network around the Scenic Rim including Wyaralong Dam</td>
<td>Consideration of activities other than walking for the Scenic Rim area. Develop recreational activities and trails around the Wyaralong Dam.</td>
<td>Provide facilities for active visitor experiences particularly in relation to the proposed Wyaralong Dam.</td>
<td>Need to seek agreement from QPW and Department of Primary Industries. Seek agreement from Queensland Water Infrastructure.</td>
<td>Diversify the potential of visitors who come to the Scenic Rim. Provides opportunities for hire businesses to be set up.</td>
</tr>
<tr>
<td>12 Kooralbyn Conference Centre in Scenic Rim (in liquidation at time of printing)</td>
<td>Expansion and on-going upgrading of existing facilities is required. Potential for development of air strip for car club days.</td>
<td>Attracts a potential for meetings into the area. Enhances opportunities for marketing to car club members.</td>
<td>Marketing to encourage meetings and events to be held outside of cities and regional centres.</td>
<td>Enhances the only conference facility in the Scenic Rim. Repeat visitation.</td>
</tr>
</tbody>
</table>
## Table 9: Tourism investment opportunities – The accommodation sector

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
</table>
| 13 Increasing the number of caravan and camping sites in the Scenic Rim | Boonah, In and around Beaudesert, Canungra, Fernvale | 2009-onwards         | - The Scenic Rim area lends itself to further caravanning and camping facilities  
- The sale of caravan parks in particular in coastal areas has left a significant gap in this form of accommodation particularly for travelling visitors  
- There is a significant risk that visitors from the caravan and camping markets will bypass the Brisbane Region unless good quality facilities are introduced particularly by councils  
- Regional councils are in the best position to identify and secure appropriate sites for camping and caravanning activities which can’t then be leased to commercial operators  
- Local councils may need to purchase appropriate land for future caravan and camping sites in order to protect them from other uses |
| 14 New caravan parks near or at Mt Cotton                              | Redlands City Council                          | 2009-onwards         | - Mt Cotton is near to the M1 freeway and provides an excellent location for those visitors who are on drive holidays to have the choice of this accommodation type close to Brisbane  
- It provides an ideal location for overnight stays, thereby extending potential visitor spend |
| 15 New hostel and backpacker accommodation                              | Boonah, Beaudesert, Canungra                   | 2010-2013            | - New hostel and backpacker accommodation is required not only for visitors but to provide an accommodation option to some tourism sector staff  
- Accommodation is needed for fruit pickers and other seasonal workers  
- Accommodation is also needed for those undertaking mountain biking, tours as well as bush trekking |
| 16 Creating a quality serviced apartment hotel style facility within the Ipswich railway workshop precinct | Ipswich                                        | 2010-2012            | - Creation of a multi-purpose event and function facility which also can cater for larger meetings and conferences within the railway workshop precinct will necessitate on-site accommodation  
- Ipswich needs to increase the critical mass of quality commercial accommodation available  
- Onsite accommodation will potentially assist in the viability of evening based events including the railway workshops as well as other events and functions using the proposed multi-purpose event venue |
| 17 Caravan park and camping site with cabins                            | Esk                                            | 2010-2012            | - Develop new caravan and camping site facilities around Wivenhoe Dam Lake  
- Create small scale cabins (moveable to cater for changing dam lake levels) |
| 18 Developing a cluster of farm stays, bed and breakfast establishments and guest houses throughout the Scenic Rim | Throughout out the Scenic Rim and Lockyer Valley | 2009 onwards         | - There are existing B&B and a limited number of farm stay experiences within the region  
- In the absence of larger accommodation facilities developing marketing clusters for co-operative promotion amongst farm stays and B&Bs needs to be considered  
- Farm stay and B&B activity needs to be undertaken as a supplementary income stream to an existing primary income stream  
- Wherever possible, existing buildings should be upgraded to cater for commercial accommodation on a small scale rather than building new facilities  
- Look to develop guest houses as new style accommodation noting limited demand for B&Bs |
| 19 Developing a 5-6 star major city based hotel in Victoria Park        | Brisbane CBD                                   | 2010-2012            | - Brisbane currently lacks a critical mass of higher quality fully serviced hotels to stimulate high yielding leisure visitors as well as catering for the on-going growth in business tourism  
- Shortage of land, premium land costs and high construction and development costs are limiting the growth of hotel activity in the region  
- Without further significant new hotel investment opportunities are likely to be constrained for growth in key target markets  
- Brisbane needs major high quality hotel brands as part of its desire to position itself as a global city of significance |
Table 9: Tourism investment opportunities – The accommodation sector cont.

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>5-6 star quality hotel in Howard Smith Wharves, Carrilpa Park or Newstead River Park</td>
<td>Brisbane CBD</td>
<td>2010-2013</td>
</tr>
</tbody>
</table>
|         |           |                      | ● Based on visitor growth forecasts Brisbane is likely to require an additional 3,500 rooms to be developed over the 10-year period out to 2018  
● Brisbane needs to encourage an appropriate mix of commercial accommodation and avoid an imbalance which is driven by construction and development costs as well as achievable returns on investment  
● Consideration given for multi-use developments including retail, office and larger scale hotel facilities  
● Howard Smith Wharves etc provides an excellent downtown proximity adjacent to the Brisbane River and the CBD office district |
| 21      | Creation of two eco lodges to anchor either end of the Scenic Rim | Scenic Rim region | 2011-2015 |
|         |           |                      | ● A walk experience through the Scenic Rim  
● A 4-5 star quality eco lodge catering for up to 30 people at start and end of walk  
● Location to benefit from proximity to National Park  
● Need for two eco lodges assumes a lineal walk rather than a circular walk (where only one eco lodge would be required)  
● A feasibility study is required to test the viability and also consider Glen Rock Park |
| 22      | Fishing lodge and guest house | Esk | 2009-2010 |
|         |           |                      | ● Utilise heritage homestead overlooking Brisbane River as base for fishing lodge, small events and guest house  
● Need to develop arrangement with local Heritage Society who have lease on property |
| 23      | Developing high quality huts or tent camps along the Scenic Rim | Scenic Rim region | 2011-2015 |
|         |           |                      | ● Need to cater for one night/two day trekking experiences as well as the full walk which may be 3 nights/4days  
● Need for public/private partnership approach to allow high quality tent camps or huts to be created in strategic locations  
● Consider a series of huts on private land adjoining the National Park  
● Visitaton to the region will be encouraged and longer length of stay promoted by offering accommodation facilities adjacent the national park  
● It is difficult to fully appreciate the Scenic Rim world heritage sites without overnight stays in the region  
● The great walk needs to be actively promoted by local tourism interests, regional tourism and the state  
● An appropriate concession fee arrangement would need to be negotiated with the operator to assist with maintaining the walks as well as monitoring impacts particularly from accommodation facilities |
| 24      | Major hotel facility at North Shore | North Shore, Brisbane | 2010-2014 |
|         |           |                      | ● Higher quality fully serviced hotel facility as part of the overall master plan  
● Need for commercial accommodation at or around North Shore to support both leisure and business traveller needs and with link to airport as well as proposed new Moreton Bay ferry terminal within the Brisbane River |
### Table 10: Tourism investment opportunities – Attractions and activities

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
</table>
| 25 A nationally significant indigenous visitor attraction | South Bank, Brisbane | 2010-2012 |  - Brisbane city lacks visitor experiences and lacks iconic built or natural assets  
  - Need for highly interactive and exciting indigenous visitor experience with a wide interpretation  
  - Must be able to excite domestic as well as international visitors  
  - Potential to position the attraction as also an educational/training base for indigenous tourism initiatives elsewhere throughout the state |
| 26 Major Aquarium and Marine Discovery Centre focussed on Moreton Bay ecology | Brisbane CBD, river frontage | 2010-2012 |  - Need for new visitor experiences and attractions to appeal to leisure, convention and incentive markets  
  - Need to create a link to Moreton Bay to help explain the benefits and virtues from a tourism perspective  
  - Need to ensure the attraction is easily differentiated from standard aquarums as in Sydney and Melbourne  
  - Opportunity to link with tour operator programs for whale watching, dolphin watching, dugongs etc  
  - Provide an anchor attraction |
| 27 Interactive story of Brisbane experience viewing platform and cable car | Mt Coot-tha and Botanical Gardens, Brisbane | 2012-2015 |  - Mt Coot-tha provides the primary viewing area overlooking Brisbane City and out towards the Scenic Rim  
  - Need to refresh and redevelop the viewing area and facilities on Mt Coot-tha  
  - Need for commercial development opportunities to assist with infrastructure costs and return on investment  
  - Cable car- sky rail provides commercial attraction, mechanism for visitor management and vehicle – traffic management  
  - Botanical Gardens at base of Mt Coot-tha able to be enhanced and better profiled through link to Mt Coot-tha viewing platform  
  - Attractive indoor high quality audio-visual experience on the story of Brisbane beneficial to all markets and offering commissionable product  
  - Activities such as flying fox or luge to add excitement and entice visitors to the area |
| 28 River cruise extending from Brisbane CBD to Lone Pine Koala Sanctuary and upstream on the Brisbane River | Lone Pine Koala Sanctuary and other areas of the Brisbane River | 2011-2015 |  - The opportunity to investigate and develop river cruise upstream beyond Lone Pine Koala Sanctuary  
  - Opportunity to link Brisbane CBD with Ipswich (noting one river obstacle to be addressed)  
  - Opportunity to provide an alternative transport link between Brisbane and Ipswich via the Brisbane River for at least part of the journey  
  - Need to identify options and impacts of slower traditional vessels or faster vessels such as low impact jet boats (reduced wake requirements)  
  - Opportunity to create river cruise product linking in visitor attractions such as Lone Pine and offering different modes of transport |
| 29 Development of the railway heritage precinct | Ipswich | 2011-2015 |  - Expand the existing museum facilities and activities (utilise National Rail Museum in York, England as best practice model)  
  - Create commercial developments – restaurants, retail etc using existing rail buildings where possible  
  - Synergies with the new hotel and meeting centre being proposed (project no.16)  
  - Develop/extend transport theme into Ipswich City via cycleways and light rail etc |
| 30 Scenic Rim Walk | Main Range (Gatton-Killiany) | 2011-2015 |  - The highly attractive vista created from the national parks within the Scenic Rim area can be further enhanced by a high quality walkway  
  - Creation of a visitor attraction offering a product similar to that available in Cradle Mountain (Tasmania) or Great Ocean Walk (Victoria) should be exposed  
  - The walk would provide an opportunity to highlight and position this area of world significance  
  - The walk could provide impetus for other investments to support the new product  
  - Funding for maintenance of the walk could be contributed to via visitors undertaking commercial tours  
  - Opportunities at Glenrock Park to be explored  
  - Use findings from Cross Border Study |
Table 10: Tourism investment opportunities – Attractions and activities cont.

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>Development of Howard-Smith Wharves</td>
<td>Brisbane CBD</td>
<td>2011-2014</td>
</tr>
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<tr>
<td>32</td>
<td>Cheese Factory and retail outlet</td>
<td>Somerset or Lockyer Valley</td>
<td>2011-2014</td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td>33</td>
<td>Lavender Farms</td>
<td>Somerset or Lockyer Valley</td>
<td>2011-2014</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>34</td>
<td>Chocolate Factory</td>
<td>Somerset or Lockyer Valley</td>
<td>2011-2014</td>
</tr>
<tr>
<td></td>
<td></td>
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</tr>
<tr>
<td>35</td>
<td>Coolana Olives Retail Shop</td>
<td>Minden, Somerset</td>
<td>2011-2014</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Country markets and gourmet food emporium</td>
<td>Sandford or Dayboro (Pine Rivers)</td>
<td>2010-2011</td>
</tr>
<tr>
<td></td>
<td></td>
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</tr>
<tr>
<td>37</td>
<td>High quality cafe, lookout and interpretation centre</td>
<td>Mount Glorious Summit (Pine Rivers)</td>
<td>2010-2011</td>
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</tbody>
</table>
## Table 10: Tourism investment opportunities – Attractions and activities cont.

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
</table>
| 38 Farm Gate / Food Tour Experience | Forest Hill (Lockyer Valley) | 2011-2012 | - Determine farmers’ potential to open up their properties  
- Link in with gourmet cafes and country pubs in town and surrounding towns in the Valley  
- Construct an information centre or kiosk on the Warrego Highway which will provide interpretation and showcase the premium food products of the Lockyer Valley |
| 39 Gourmet food centre | Gatton and Laidley areas (Lockyer Valley) | 2010-2011 | - Expand/develop Das Neumann Haus into a true gourmet centre  
- Focussed on local food products including potatoes, gourmet meat pies, etc. |
| 40 River sports centre and activity base | South of Wivenhoe Dam wall (Brisbane River) | 2010-2012 | - Need approval of SEQ Water  
- Create base for river kayaking, rafting and other activities  
- Base for renting equipment, as event staging post |
| 41 Visitor centre for fauna and bird watching | Gatton area (Lockyer Valley) | 2013+ | - Could be developed in conjunction with public facilities such as a library or sports centre  
- Create opportunity for bird watching interpretation |
| 42 Develop a viewing platform | Kooralbyn (Scenic Rim) | 2013+ | - Create views back to Mount Barney and vista to Gold Coast  
- Interpretation boards with a picnic area for those not able to undertake park walks |
| 43 Media Industry Park and Australian Television Museum Centre | Newstead (Brisbane) | 2012+ | - Proposal to create a museum to capture the historical developments of Australia’s television industry  
- First public transmission took place between Brisbane and Ipswich on 13 July 1956  
- The industry park aims to attract key companies in the field of media and provide ancillary services e.g. retail, restaurants etc |
| 44 Aviation – air force attraction / experience – flight simulator | Amberley Air Force Base, near Ipswich | 2012+ | - Dependent on security issues  
- Potential for (restricted) site visits  
- Potential for air displays  
- Potential for aircraft museum |
| 45 Walkabout Creek Centre and walkabout trail | Brisbane (Forest Park) | 2008-2011 | - National Park within 30min of Brisbane  
- Nature-based recreation mode  
- Existing infrastructure to support further redevelopment and marketing as a destination including wildlife centre and restaurant |
| 46 Roma Street Parklands Redevelopment | Brisbane | 2009-2012 | - 16ha Parklands created for the city from disused industrial site (railway yard)  
- Now forms part of major public infrastructure redevelopment which will offer visitors an improved experience in this area |
| 47 Eden Gardens Project | Brisbane | 2009-2015 | - Environmental education experience in Brisbane  
- Similar to, but independent of, the Eden Project in Cornwall, UK  
- Facilities could include (as well as the gardens), a café, conferencing facilities, retail nursery and potentially a day spa  
- Developments dependent on the purchase of an appropriate site |
| 48 Wellness retreats | Hinterland – including Woodford, Mount Cotton, Mount Samson | 2009-2012 | - Relaxation and replenish experiences increasingly sought by visitors  
- Locations in rural areas but close to primary visitor source i.e. Brisbane |
| 49 Ghost tours in old mental asylum facility | Ipswich | 2009-2012 | - Permission from UQ to undertake tours on their campus  
- Additional night time activity for Ipswich visitors  
- Themed events possible |
| 50 Further develop Rosewood Historic Rail Museum | Rosewood – Kurkula, Ipswich City environs | 2010-2013 | - One of the best preserved regional track in Queensland  
- Large number of engines and carriages which are mostly in working order  
- Opportunities to open up more than once a week to provide visitors with a historic train experience |
<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
</table>
| Further develop Narrow Gauge Railway                                  | Woodford                         | 2010-2013            | - Steam train operations  
- Opportunities to undertake special event days  
- Opportunities to open up more than twice a month to provide visitors with a historic train experience |
| Develop a Red Deer Interpretative Centre                               | Toogoolawah, Somerset             | 2010-2013            | - Identify need for visitor information and interpretation centre on Red Deer  
- Possibility to combine with a community facility  
- Outline historical links of the area with Red Deer |
| Create recreational pursuits based on/around new Wyaralong Dam         | Kalbar                           | 2012+                | - Utilise the historic town of Kalbar as starting point for water pursuits  
- Redevelop historic buildings for accommodation and cafes  
- Hire facilities for e.g. kayaks, sail boats etc  
- Development of day use and camping areas, with a network of walking, cycling and equestrian trails connecting to the wider region. |
| Creation of an “awesome foursome” activity package, based around transport and vehicles | Ipswich                          | 2012+                | - Potential for commissionable product and tour operator packages  
- Requires permission from Air Force to use a “flight simulator” (if available)  
- Collaboration between operators of motor sports circuits, jet boat owners and rail museum |
| Adventure tourism activities                                           | Glen Rock (Lockyer Valley)       | 2012+                | - Activities undertaken on EPA managed lands  
- Mountain bike riding and rock climbing  
- Develop hire facilities in nearby towns |
| Enhance the motorbike riding centre and motocross trail network        | Gatton                           | 2012+                | - Opportunity to better utilise existing facilities  
- Provide activity for visitor segment which will extend length of stay  
- Potential for new accommodation style hotel e.g. Formulea 1 Motel |
| Develop the Gatton Equine Event Centre                                | Gatton                           | 2012+                | - Create facilities for new group of visitors  
- Prepare an events calendar  
- Incorporate into other attractions / activities in the Lockyer Valley or neighbouring hinterland areas |
| Integrate wine trails into other tourism experiences                   | Locations throughout the Scenic Rim | 2010                | - Build repeat visitation  
- Increase product deliverables through collaborating with e.g. Local restaurants and cafes, art and craft retail, accommodation providers etc. |
| Development of Bremer River in Ipswich for recreational pursuits and construction of pier for leisure trips out of Ipswich | Ipswich                          | 2011                 | - Develop walking paths with picnic areas and public toilets  
- Construct a pier with attached visitor information kiosk  
- Provision for mobile food kiosks  
- Visitor experience enhanced for the city and benefits to the residents |
| Climbers Centre for rock climbing                                     | Mt French                        | 2009-2010            | - Seek agreement for an educational centre in the park with QPW  
- Market concept of outdoor education to a new market group  
- Increase in leisure visitation and educational group visitation  
- Further emphasises unique selling point of the Scenic Rim – mountains and spectacular scenery |
| Oxley Creek water sports complex                                       | Locations throughout the Scenic Rim | 2010                | - To be developed as part of the rehabilitation of former quarry sites  
- Potential to develop a regionally significant motorised and non-motorised water sports complex close to Brisbane |
### Table 11: Tourism investment opportunities – Transport

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
</table>
| 62   Directional Signage      | Brisbane Region    | 2009-2010            | ◦ Improvements to exit signs on all main highways  
 ◦ Signs for secondary roads indicating distances between towns etc  
 ◦ Improved signs for tourism product in towns                                                                                       |
| 63   Motorways in Brisbane    | Brisbane City      | 2009-2010            | ◦ Improvements to exit signs on Brisbane highways  
 ◦ Improved signs for directing traffic to motorways from surface streets                                                             |
| 64   Public transport in Brisbane | Brisbane City          | 2009-2010            | ◦ Interaction and integration between the various modes of transport in the capital essential to ease visitor movement in the city  
 ◦ Consider light rail options between precincts                                                                                     |
| 65   Motorways in Ipswich     | Ipswich City       | 2009-2010            | ◦ Improvements to exit signs on Ipswich Motorways  
 ◦ Improve freeway interchanges  
 ◦ Beautification to the entry into Ipswich at point where traffic leaves motorway and enters Ipswich surface streets             |
| 66   Roads in the hinterland | Hinterland         | 2011-2013            | ◦ Ensure regional roads capable of managing increased traffic flows  
 ◦ Consider town bypasses  
 ◦ Consider passing lanes where dual carriageway roads are not possible                                                               |

### Table 12: Tourism investment opportunities – Superstructure

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
</table>
| 67    Roma street development                | Brisbane City| 2008-2010            | ◦ Integrated plan for new transit centre, improved public access, redeveloped green space and parklands, commercial and residential development  
 ◦ Ensure visitors are not overlooked e.g. identify an appropriate number of bus/coach bays at Roma Street which will effectively manage visitor flow  
 ◦ Ensure seamless interchange between buses and trains at Roma Street  
 ◦ Ensure clear signage and information kiosks for visitors at Roma Street                                                                 |
| 68    Land inducement for hotels in Brisbane city | Brisbane City| 2008-2010            | ◦ Identify solution to current issue of lack of land availability for 5-star accommodation development  
 ◦ If necessary, create special time limited legislation to assist this infrastructure sector                                               |
<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>69</td>
<td>Develop an events calendar for the hinterland</td>
<td>Scenic Rim, Lockyer Valley, Somerset, Moreton Bay rural areas</td>
<td>2009-2010</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Themes to focus on include arts, food and wine, music, motor racing and wellbeing</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Beneficial for the hinterland areas to work together to avoid competition and date clashes</strong></td>
</tr>
<tr>
<td>70</td>
<td>Extend the events calendar for Brisbane City</td>
<td>Brisbane</td>
<td>2009-2010</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Themes to focus on include major arts events and sporting activities</strong></td>
</tr>
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<td></td>
<td></td>
<td></td>
<td><strong>Expanding the events calendar in the city, both in number and breadth, should lead to increased length of stay, increased spend and increased dispersal (to the hinterland) by visitors</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Utilise the South Bank development for festivals</strong></td>
</tr>
<tr>
<td>71</td>
<td>Brand Brisbane</td>
<td>Brisbane</td>
<td>2009-2010</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Continued development of the city brand</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Position in market place for both domestic and international appeal and understanding</strong></td>
</tr>
<tr>
<td>72</td>
<td>Great Sunshine Way</td>
<td>Brisbane Region</td>
<td>2009-2010</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>An international touring route that affords visitors of all kinds – whether traveling by car, rail, coach or boat – to experience the best of Southern Queensland (courtesy of TQ website)</strong></td>
</tr>
<tr>
<td>73</td>
<td>Visiting Friends and Relatives (VFR)</td>
<td>Brisbane and Hinterland</td>
<td>2010-2012</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Develop campaign especially for the domestic VFR market</strong></td>
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<tr>
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<td></td>
<td><strong>Consider utilising in shoulder seasons</strong></td>
</tr>
<tr>
<td>74</td>
<td>Interpretative signage</td>
<td>Hinterland</td>
<td>2009-2011</td>
</tr>
<tr>
<td></td>
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<td></td>
<td><strong>Towns require new/more visitor information kiosks and interpretative boards</strong></td>
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<td></td>
<td></td>
<td></td>
<td><strong>Creation of lay-bys in appropriate highway locations with interpretation, picnic tables etc</strong></td>
</tr>
<tr>
<td>75</td>
<td>Beautification programs</td>
<td>Hinterland towns and Ipswich train station</td>
<td>2009-2011</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Improved/increased street lighting, street planting, rest areas, picnic tables etc to provide attractive resting options for visitors</strong></td>
</tr>
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<td></td>
<td></td>
<td></td>
<td><strong>Platform and station improvements to railway in Ipswich to make more inviting for visitors</strong></td>
</tr>
<tr>
<td>76</td>
<td>Re-branding exercise for positioning whole area</td>
<td>Scenic Rim</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Raise appreciation of the tourism industry by both local authorities and communities</strong></td>
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<td></td>
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<td></td>
<td><strong>Brand awareness by key source markets, including ensuring The Scenic Rim name is understood based on interpretative volcanic rim stories and marketing themes</strong></td>
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<td></td>
<td><strong>Greater collaboration between communities of the Scenic Rim and more understanding by residents of the benefits of tourism</strong></td>
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<td></td>
<td><strong>Ensure communication strategy is aligned with the Brisbane Marketing and SEQC plans</strong></td>
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<td><strong>Develop new collateral to include brochures, maps, website etc. to ensure consistent Scenic Rim themes and messages</strong></td>
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<td></td>
<td></td>
<td></td>
<td><strong>Align with existing Scenic Rim Tourism Marketing Plan</strong></td>
</tr>
<tr>
<td>77</td>
<td>Link Scenic Rim websites and SEQC web-site to profile tourism activities and general recreational activities available in the Scenic Rim</td>
<td>[virtual]</td>
<td>2008</td>
</tr>
<tr>
<td></td>
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<td></td>
<td><strong>All relevant tourism and recreational data gathered and collated for the re-vamped website</strong></td>
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<tr>
<td></td>
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<td></td>
<td><strong>Relevant material on Queensland Parks and Wildlife and on National Parks and World Heritage sites linked via a website</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>All tourism operators in the Scenic Rim encouraged to link their own websites to the Scenic Rim website</strong></td>
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<td></td>
<td></td>
<td></td>
<td><strong>Ensure website links through to TQ’s SEQC website</strong></td>
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<td></td>
<td><strong>Information from all relevant agencies including the new councils and information from key Government agencies included</strong></td>
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<td></td>
<td><strong>Higher volume of website traffic and on-line bookings from website</strong></td>
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<td></td>
<td><strong>Consider alignments with neighbouring destinations and products e.g. Gold Coast’s Hinterland Food and Wine Trail</strong></td>
</tr>
</tbody>
</table>
### Table 14: Tourism investment opportunities – Community

<table>
<thead>
<tr>
<th>Project</th>
<th>Estimated cost</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>78</td>
<td>Introducing a community awareness program</td>
<td>$&lt;70k</td>
<td>2010+</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>Improve community understanding of tourism and its benefits</td>
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<td></td>
<td></td>
<td>Provide information (brochures) to rural residents on value of tourism via local jobs, spend, investment etc</td>
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<td></td>
<td>Need to develop positive attitude towards tourism</td>
</tr>
<tr>
<td>79</td>
<td>Introducing affordable housing for workers</td>
<td>$4m</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Lack of accommodation for tourism and hospitality workers</td>
</tr>
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<td></td>
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<td></td>
<td>Need for addressing issue ASAP</td>
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</tbody>
</table>

### Table 15: Tourism investment opportunities – Strategic planning

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>80</td>
<td>SEQ Regional plan</td>
<td>Brisbane Region</td>
<td>2008-2018</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ensure all proposed and planned tourism projects and activities are compliant with the regional plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>If necessary, tourism review and recommend alterations to the regional plan (living document)</td>
</tr>
<tr>
<td>81</td>
<td>New regional councils develop tourism plans</td>
<td>Hinterland</td>
<td>2008-2009</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New business plans required for each of the new councils created on 15 March 2008</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ensure new plans mesh with regional plans</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ensure new plans do not directly compete with each other in a negative way for the region</td>
</tr>
</tbody>
</table>

### Table 16: Tourism investment opportunities – Human resources

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>82</td>
<td>An Up-Skilling Program</td>
<td>Brisbane City</td>
<td>2010+</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rural Hinterland</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>There is a need to up-skill many tourism sector players, particularly people working in retail, restaurants and tour operations for what is required regarding service standards</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Higher service standards are required if the region is to become and remain competitive</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>An up-skilling program should be developed and implemented in the region</td>
</tr>
<tr>
<td>83</td>
<td>Employment and skills audit</td>
<td>Hinterland particularly but may also be necessary for Brisbane City</td>
<td>2009+</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Shortage of skilled staff already noted</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Need for skills audit to identify gaps, especially if sector growth</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Need to look at multi-skilling opportunities, especially in the rural hinterland areas of the region</td>
</tr>
</tbody>
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This Regional Tourism Investment and Infrastructure Plan

The purpose of this Regional Tourism Investment and Infrastructure Plan (the RTIIP) is to provide a direction for the sustainable development of tourism in the Moreton Bay and Islands region out to 2018.1

Among other things, the RTIIP aims:

- to identify tourism related infrastructure requirements for the region;
- to identify new tourism product that meets future visitor expectations and demand; and
- to provide a visionary and aspirational document for the sustainable development of tourism to the region.

The preparation of this RTIIP is the second plan prepared for Brisbane Marketing, as part of their regional responsibilities. It should be read in conjunction with the Brisbane City and Hinterland RTIIP, which comprises the balance of the Brisbane RTO region (Brisbane City, Brisbane’s Country Valleys and the Scenic Rim).

Whilst this is a separate document, parts of the background cover the same, or similar, points to the Brisbane City and Hinterland Plan. However, should this document be read by someone in the absence of the other RTIIP for the region, the background sections are repeated in full in the sections following.

The two RTIIPs were prepared in conjunction after conducting consultation with: government agencies; industry operators; developers and investors. Over 300 people in the entire Brisbane Region were consulted.

As a result of the research and analysis, by 2018 Moreton Bay and Islands has the potential to:

- become a significant destination for inbound and interstate and intrastate leisure visitor markets;
- become a significant niche destination for intrastate, interstate and inbound visitor markets for specific, eco-tourist experiences, based around its marine life and national parks; and
- be integrated with Brisbane City to provide high quality and easily accessible eco experiences.

In order that the area does become a significant destination for key visitor markets and remains competitive:

- significant and on-going investment in new and enhanced infrastructure will be required for Moreton Bay and the Islands including transport infrastructure (improved staging posts to the islands and bay);
- a strong marketing and branding strategy, based around product availability and its ease of access is established for the primary source markets; and
- the region will need to ensure that the product types available suit the key markets of eco-focussed and general leisure-oriented visitors.

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1 It is noted that this RTIIP’s geographic area does NOT reflect the new regional council boundary of the same name. The area is defined in full on page 6 of this report and a descriptive map is on page 7.
In this RTIIP, the consultants look at: infrastructure projects for both the coastal urban strip and island locations in the area (excluding those already discussed under the Brisbane City and Hinterland Plan); the level of investment required to fund those projects and areas where the private sector can be encouraged to invest.

The key requirement is to identify commercial investment opportunities and avoid too heavy a reliance on government funding wherever possible.

The RTIIP does not purport to canvass all possible projects for the area. Rather, it focuses on those projects which have been identified as having strong stakeholder support; which are more likely to succeed and those projects which are likely to assist in realising the vision for the area. Investment opportunity criteria have been applied to each project.

What this RTIIP deliberately is not; is a summary of all projects, all plans and strategies. This RTIIP provides a vision for tourism in the Moreton Bay and Islands area of the Brisbane Region. It therefore is selective. It should be recognised that the focus of this RTIIP is on tourism development and investment to particularly attract international and interstate visitation. Local (SE Queensland) recreational users and associated recreational projects are important but not the focus of this RTIIP.

A specific challenge to creating new/improved tourism nodes which will help extend visitor length of stay and expenditure and offer greater dispersal throughout the Moreton Bay and Islands area is the high proportion of the region that is National Park, Marine Park and/or Ramsar listed.

Because of the commercial imperative that needs to be achieved to support private investment as well as many public funded projects, this requires projects to be prioritised carefully. However, this means some type of “hard” development in places that historically have been treated as “non-build” by EPA and QPW (the custodians of the national park zones). By doing this however, an opportunity arises to assist the funding of national parks through income received from visitors choosing to stay in these developments.

Therefore, whilst this RTIIP focuses on those projects which could or are more likely to gain stakeholder support and which can lead to many of the others being developed over time, the consultants acknowledge that there are significant discussions to be had between a number of government agencies for these opportunities to be realised.

Tourism development therefore, must by necessity, be shown to be environmentally sustainable and commercially viable.

**Catalyst investment projects**

There are 38 investment opportunities suggested in this RTIIP.

Of these, ten are classified as *catalyst projects*: projects which need to be pursued in order to, among other things, trigger the implementation of others. These catalyst projects are provided to also address major issues, find a clear strategic advantage for the region and stimulate interest and debate. As a necessity many are supply led and are aimed at addressing issues that are constraining Moreton Bay’s tourism growth. The feasibility of these ideas will need to be tested through more detailed analysis.

The ten catalyst projects are:

1. Creation of an eco-resort on Moreton Island
2. Creation of an eco-resort on North Stradbroke Island
3. Develop Caboolture Airfield as major visitor attraction and activity base for gliding flights, parachuting, scenic flights and high value rides in Warraways, the Tiger Moth and Mustang, together with redevelopment of existing air museum with links to Temora Air Museum etc
4. Build extended marina facilities at Wynnum-Manly
5. Bribie island marina expansion
6. Redevelop Toondah Harbour
7. The development of major marine-based events at Woody Point at Redcliffe or Weinam Creek with offshore power boat racing and other similar types of activities
8. Infrastructure redevelopment on Dunwich harbour, North Stradbroke Island
9. Development of the jetty, unmanned Visitor Centre and interpretation facilities on Peel Island
10. Creating more vehicle-free beach areas on Moreton Island

Each of the catalyst projects are canvassed later in this RTIIP.

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2. The Ramsar Convention is an area designated by the Commonwealth, through the Environment Protection and Biodiversity Conservation Act 1999, to be a wetland of international importance. The convention aims worldwide to conserve remaining wetlands because they are considered a threatened habitat group.
Key infrastructure projects

Key infrastructure projects which require immediate attention and which are canvassed in this RTIIP are:

1. Improving/changing the transport infrastructure to and on the Moreton Bay Islands. This specifically includes ferries, piers and jetties, transportation options on the islands and interaction between the various transport modes.

2. Improvement to public transport on the Moreton Bay coast e.g. redevelopment of rail stations, creation of light rail/trams on disused rail lines and more buses e.g. from Caboolture to Bribie Island.

3. Providing opportunities in appropriately defined locations within the island national parks for eco-accommodation to be built.

4. Improving the management of waste water within the bay area in order to ensure no/limited compromise to the marine environment.

Additional Infrastructure Projects

A number of additional infrastructure projects are canvassed in this RTIIP. They include projects to:

- secure skilled and semi-skilled staff;
- develop new attractions and activities to generate longer lengths of stay;
- expand the number of and upgrade the accommodation facilities catering to leisure and niche (eco) visitor markets; and
- introduce a more effective process for dealing with infrastructure blockages.

The investment required for the implementation of investment opportunities

The focus is on projects able to be funded by the private sector and which can generate a commercial return. Other projects can be funded by public-private partnerships utilising public assets with private sector investment with the balance being publicly funded projects to provide supporting infrastructure where a commercial return is unlikely.

Next steps

It is suggested that the Action Group formed to oversee the implementation of the infrastructure projects identified in the RTIIP for Brisbane City and Hinterland could also oversee this RTIIP for the Moreton Bay and Islands region. The Action Group could be a Destination Action Group as contemplated by the Queensland Tourism Strategy. As stated in the Brisbane City and Hinterland RTIIP, the consultants note the following points:

- The Action Group will, ideally, be a public-private partnership, given the need for a whole-of-government approach for many of the projects.
- The Government and private sector members of the Action Group will, ideally, be senior personnel with the mandate to make decisions so progress is not hampered by the need to vet decisions.
- The Action Group will, ideally, aim to achieve tangible outcomes in the short and medium term that show positive outcomes quickly.

It is suggested that smaller, working groups are established to oversee the development and implementation of specific investment opportunities projects to support the Action Group.

It is also suggested that the region’s tourism organisation Brisbane Marketing, provides secretariat support to the Action Group and the working groups.

An implementation strategy should be prepared by or for the Action Group once the recommendations made in this RTIIP and the Brisbane City and Hinterland RTIIP are agreed. That strategy should provide a tool for progressing, monitoring and reporting upon each of the infrastructure projects.

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3. These projects were noted by infrastructure agencies, councils, operators and developers-investors

4. By this is meant a mix of senior public and private sector stakeholders recognising that for many investment projects there may be a need for both public and private sector funding and investment as well as the need to collectively address infrastructure bottlenecks.
1.1 The Moreton Bay and Islands area

For the purposes of this RTIIP, the area includes the coastal zone of Moreton Bay Regional Council (incorporating parts of Bribie Island, Redcliffe, Pine Rivers and Caboolture), Redland City Council (incorporating North Stradbroke Island and the southern islands of Moreton Bay) and the bayside areas of Brisbane City Council (including Wynnum – Manly and Moreton Island). Excluding the small resident population of Moreton Island5 (included in the Brisbane City and Hinterlands RTIIP) the area has a combined population of ~464,0696.

One possible definition for the area is “The bay is an expanse of water that is sheltered by Moreton Island, North Stradbroke Island and Bribie Island and consists of approximately 360 smaller islands7...” The Moreton Bay and Islands region is supported by Brisbane Marketing as the regional tourism organisation (RTO)8 and by a regional Destination Management Plan (DMP)9.

Within Moreton Bay there are three major island groups. The majority of Bribie Island is now part of the Moreton Bay Regional Council (the remainder is incorporated into Sunshine Coast), Moreton Island (and St Helena and Peel Islands) is part of Brisbane City Council and North Stradbroke (together with Macleay, Coochiemudlo, Lamb, Karragarra and Russell Islands) is part of Redland City Council. Whilst the islands form part of the area known as South East Queensland (which includes all the LGAs identified in this plan), the key islands for visitors are not likely to have forecast higher than average population growth over the next ten years compared with other parts of the region. The resident population of the islands is very small10 and with national park development constraints, unlikely to increase rapidly in the next decade. However, the coastal strip, including Redlands (Wellington Point, Cleveland, Victoria Point and Redland Bay), Bayside Brisbane (Wynnum-Manly and Sandgate), Redcliffe (Scarborough, Margate, Woody Point) and Caboolture (Donnybrook, Toorbul, Ningi, Sandstone Point, Beachmere and Deception Bay) could see major increases in population. They are also of importance within the Moreton Bay and Islands RTIIP as they provide the “staging posts” for current ferry operations and road transport and also offer mainland beach opportunities.

By implication this means that infrastructure requirements are primarily for the benefit of visitors (rather than residents) for some of the islands, but developments on the mainland coastal strip will be of benefit to both residents and visitors. This has implications for planning purposes but also provides an opportunity for PPPs with the private sector potentially more interested in providing funds to a project which ultimately can provide an attractive return on investment to their shareholders. Given the array of infrastructure projects suggested in this plan where end users can ultimately be charged for product utilisation, this provides a rare opportunity.

5 252 persons as identified on census night 2006, based on CDs’ 3200101 and 3200102, ABS Census data, cited 24 April 2008
6 Census Fact Sheets No. 1, Department of Infrastructure and Planning, Queensland Government, November 2007
7 Moreton Bay and Islands – Tourism Infrastructure 2008, Invest Brisbane, Page 2
8 Brisbane Marketing (part of Invest Brisbane, an independent agency of Brisbane City Council)
9 The first Brisbane Region DMP was produced in 2004 and comprised three sections, including Destination Analysis and Strategic Vision. The new DMP is in draft format (as at April 2008).
10 22,226 persons on census night 2006, ABS Census data, (extrapolated from usual residence tables), cited 24 April 2008
Most visitor experiences in the Moreton Bay and Islands area are located either at Brisbane River ferry points, along the coast of Redcliffe, Brisbane bayside, Redlands and on the islands themselves, indicated by the map above. The consultants have defined the following priority tourism nodes and precincts in the area:

- Bribie Island (National Park walks, northern access point to the bay)
- Caboolture Airfield (aviation museum, historic aircraft restoration, joy rides)
- Redcliffe – waterfront precinct and beaches on Moreton Bay (Scarborough marina, retail strip, pier at lagoon at Redcliffe, event activity and Woody Point)
- Redland’s bayside (Cleveland) and Mount Cotton (discussed in the Brisbane City and Hinterland RTIIP)
- North Stradbroke Island (overnight accommodation and eco experiences)
- Moreton Island (boutique eco-accommodation experiences, National Park)
- Wynnum Manly waterfront precinct with expanded marina

Table 1. Map of the region

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11 As shown in the STCRC June 2005 publication Moreton Bay Sustainability Study. Michelle Whitmore and Terry De Lacy authors - no copyright asserted by STCRC (contacted April 2008)
1.2 Development and promotion of the region

The Moreton Bay and Islands area may be perceived as an escape from the hustle and bustle of a capital city to the seaside and quiet island lifestyle, that is, to a world so close yet so far away. Despite its proximity to Brisbane and Gold and Sunshine Coasts however, a challenge the Moreton Bay and Islands area may have is to market itself both domestically and internationally. In a state where island and associated marine activities traditionally take place further north, away from the capital, where tourism activity is a major economic driver and the image of sub-tropical experiences and visitors prevail.

In addition, major sections of the area are classified as not just National Parks, but also included in Ramsar listings. Historic recreational activities, which impacted the fragile environment, may not completely fit with 21st century environmental management approaches. As a result, leisure pursuits potentially need major re-consideration into what is appropriate and at what level of sustainability activities on the islands can function at, for example, what is an appropriate carrying capacity for the islands and bay.

Non-Queensland visitors may also not be sufficiently aware of the existing leisure options on offer in Moreton Bay and Islands. With some limitations concerning insufficient product and restrictive transport options, the area may be seen as too difficult to access or participate in what could be a vibrant visitor experience. The exception to this is Tangalooma Resort on Moreton Island, which markets extensively and successfully to interstate and inbound visitors.

Moreton Bay and Islands can work to:

- develop new and redeveloped product that appeal to target visitor markets, including day visitors from Brisbane City and other areas in the Brisbane region, the neighbouring regions of the Gold and Sunshine Coasts and the Southern and Darling Downs;
- improve its transport infrastructure, including offering public transport systems, and cycle ways and pathways on the islands;
- further develop Moreton Bay and Islands as a niche eco-tourist location; and
- develop world-class national park activities, such as guided interpretation tours, bird watching hides, marine discovery tours etc.

There is a major opportunity for this area to significantly develop its eco-tourism and sustainable themes. Research is indicating more and more consumers want to have such experiences as visitors. Such tourism opportunities need to be balanced with the need for carefully managing these fragile areas, controlled by QPW/EPA.

It is within this context and need that the consultants see a dichotomy. If the National Park islands are to be positioned and promoted as applying eco-best practice it is questionable how sustainable and appropriate much 4WD activity by non-tour groups actually is, especially on Moreton Island.

To position Moreton Island as a National Park and a globally significant sand island with high quality, fauna, flora and marine ecology, movement around the islands may need to be more tightly controlled. This could mean less access in designated areas to the public in 4WDs, a preference for more vehicle free areas, and a preference for more eco-focussed guided tours in purpose built 4WDs and small eco-lodges or tent camps that aim to entice a higher yielding market.

The current perception of the visitor market to Moreton Island (with the exception of Tangalooma Resort and small number of holiday houses) is of a lower yielding locally based 4WD and recreational fishing market bringing all their own food and beverage provisions with them and staying in their own tents. Whilst this niche should not be overlooked it does not necessarily support the aspirations of EPA/QPW and commercial tourism interests wanting to encourage higher yielding visitor markets and the creation of new product development to support them.
1.2.1 Gateways to the Moreton Bay Islands
Currently, the majority of visitors to the Moreton Bay Islands utilise Toondah Harbour at Cleveland. There are other gateways as well which link primarily to the Moreton Bay Islands including Russell Island and Macleay Island from Redland Bay. In addition, the Tangalooma Resort on Moreton Island has a ferry service which links into the mouth of the Brisbane River.

The Combie Trader ferry service recently stopped operating and it is uncertain whether a new owner/operating will provide a ferry passenger service to Moreton Bay from Scarborough in the future.

It needs to be noted that the vast majority of passenger traffic to islands in Moreton Bay is commuter traffic with a large number of residential properties on Macleay Island and Russell Island in particular and to a lesser extent North Stradbroke Island.

The more residential development allowed, the harder it will be to encourage tourism development which often relies on less developed, more open space and natural locations.

1.2.2 Toondah Harbour
Toondah Harbour has been the subject of a detailed master planning redevelopment study because of the problematic land holding and associated infrastructure issues at this location. We note that despite previous efforts, it will be challenging to redevelop Toondah Harbour because of the existing land ownership, the lease arrangements and the infrastructure constraints which this generates. Infrastructure constraints and limitations for Toondah Harbour are seen in the lack of public toilet facilities particularly for ferry passenger users, the conflict between heavy vehicles and pedestrians accessing ferries and the use of Toondah Harbour boat ramp for recreational purposes. There are therefore a number of conflicting users who all require the harbour facilities often at the same time of day.

A major redevelopment of Toondah Harbour is required to address safety issues and to allow for appropriate expansion and better port planning. This is unlikely to be achieved, however, without consolidation of land holdings and the redevelopment of the total harbour area by one entity.

1.2.3 Passenger and vehicle ferries
A number of operators provide services to the Moreton Bay Islands particularly from the gateway of Toondah Harbour as well as the Moreton Island ferry facilities in the Brisbane River. Market perception is that the cost of transporting a vehicle to the islands is high and the vast majority of those taking vehicles across are from South East Queensland rather than interstate or international visitors.

There is therefore a need to develop higher yielding markets that are less price sensitive.

1.2.4 North Stradbroke Island
The bulk (about 70%) of North Stradbroke Island is under a mining lease. Consolidated Rutile Limited (CRL) has over 51% of the island under active mining lease. While the mining areas have at least another 17 years to function, (mineral and sand mining) there is little activity for tourism that can be promoted on the mining lease areas. As the company exhausts its mineral reserves there is potential for large areas of rehabilitated and non-disturbed mined land to be turned into alternative tourist based activities consistent with that of a national park. Currently however the vast majority of tourism activity centres on the marine park and whale watching and dolphin watching.

Anecdotal information indicates a desire by State Government environmental agencies to limit all forms of commercial tourism operations within Moreton Bay because of concerns over the fragility of the marine environment. The consultants note that Moreton Bay Marine Park Zoning Plan is currently being reviewed. The plan will likely hold a number of recommendations for tourism activity generally, including commercial operations.

There are three small villages on North Stradbroke Island being Dunwich, Amity and Point Lookout.

Dunwich is the primary harbour and entry point to North Stradbroke Island. Whilst there is a small airstrip on North Stradbroke Island, 99% of visitors who use commercial services enter via Dunwich Harbour.

There are infrastructure constraints in Dunwich Harbour that limit the number of vessels that use it at any one time and conflict exists at times between heavy vehicles associated with mining activity and passenger movements.

Amity Point is a small village with a cluster of holiday batches and a ferry service which links to Kooringal on Moreton Island (being the nearest point on North Stradbroke to Moreton Island).

Dunwich is the largest township on the island and the most historically significant. The majority of permanent residents and workers accommodation occurs in this township, as well as a large aboriginal community and mine workers families. Dunwich is one of the townships with the most potential to expand residentially and has the most potential to provide lower cost accommodation for tourist industry workers.

13 These islands are on a ferry service which tows across the islands in a similar fashion to a bus service.
14 The draft zoning plan was open to public submissions for over three months. The submission period ended on 7 March 2008. The reviewed Marine Parks (Moreton Bay) Zoning Plan 1997 will be updated by the EPA before 1 September 2008.
Moreton Bay and Islands Regional Tourism Investment and Infrastructure Plan 2008-2018

1.2.5 Moreton Island

Moreton Island is accessed from Amity on Stradbroke Island or, via the Brisbane River to Tangalooma Resort on its west coast, or (historically) from Scarborough to Comboyuro Point. Most ferry operators offer more than one entry point to the island though access points are strictly dictated in gateway locations (i.e. Tangalooma facilities and the Brisbane River).

There is far less development on Moreton Island than North Stradbroke. The only large facility is Tangalooma Resort which has been developed and expanded over a number of years. More recently, the resort has included a small residential enclave of high quality holiday homes.

At Moreton Island’s southern end there is the small village of Kooringal which also provides an access point from North Stradbroke. Kooringal primarily serves those interested in recreational fishing, the oyster farm operators and a cluster of holiday homes.

As one of the largest sand islands in the world the road network is suitable only for 4WD vehicles. The network of roads criss-cross the island from Moreton Bay across to the Coral Sea. Residents have special permits allowing trike, quad and trail bikes to be used on the island’s sand roads.

In addition to the large resort at Tangalooma there are a series of small holiday villages to the north on the west coast of Moreton Island including at Cowan Cowan, and Bulwer.

1.2.6 Russell Island

Russell and the neighbouring Macleay Island are close to Redland Bay (Weinham Creek Ferry Terminal) and have been developed as residential areas. Though there is some small-scale commercial accommodation available Russell Island is primarily designated for residential housing including holiday homes.

Two large scale resorts are planned for the Island though at the time of this report these were being challenged through the planning process. Though unsuccessful in their initial development application the consultants understand that one of the proposed resort proponents is reassessing the size and scale of the proposal to address council concerns.

1.2.7 Bribie Island

Bribie Island is situated a few hundred metres off the mainland (separated by the Pumice Stone Passage) at the northern most part of Moreton Bay and is mostly National Park. The island is linked to the mainland by a causeway (rather than a larger bridge structure) and feels more like part of the mainland. The Pumice Stone Passage provides a safe water anchorage and small scale marine facility. The facility is severely restricted by the low height of the causeway which vessels have to travel under.

There are commercial accommodation facilities on the island with most catering to a local or intrastate market.
2 Methodology

2.1 Steps taken to compile this RTIIP

To prepare this RTIIP, the consultants:

- reviewed documents referred to in the bibliography on page 17 of the Scenic Rim Tourism Action Plan that accompanies the Brisbane City and Hinterland RTIIP;
- conducted interviews with stakeholders in regards to the development of tourism to the regions: a list of people interviewed is on page 20 of the Scenic Rim Tourism Action Plan;
- conducted focus group sessions in Moreton Bay and Islands area; and
- tested options, issues and opportunities with the Project Steering Committee established for this RTIIP.

2.2 Data sources and limitations

The consultants have sourced quantitative data from a range of sources. Where possible, the sources are identified. Some information has been obtained from confidential sources and has not been attributed to any source provider as a result.

The consultants have not provided marketing data for the region in this RTIIP: those data are not considered core to the Plan (data is provided in the Destination Management Plan for the region) and the accuracy of data at times is compromised by small sample sizes.

Much of the data has not been able to be independently verified and the data have therefore been accepted in good faith.

Every effort has been made to present a robust and complete picture of tourism development to the region but there are inherent limitations in data sets.

Like the Scenic Rim, Moreton Bay and Islands tourist figures are included in the Brisbane Region. The only current data available beyond that is from the Tourism Research Australia local government area profiles. These are available for Caboolture LGA only (data prior to local authority amalgamation in March 2008) in the Moreton Bay area.

Historic data suggests that the number of visitors to the bay area may have been in the vicinity of 1.67 million in 2005 and an average of 1.7m per year between 1999 and 2002. Evaluating the published figures which are available, it is evident that a significant percentage of visitors are day trippers.

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15 Approximately 12 additional people specifically asked that their names be kept confidential. All of these are investors, developers or advisors to tourism projects.
16 Marketing data including qualitative and quantitative material on the regions can be accessed from either the RTO or TQ.
17 Moreton Bay and Islands – Tourism Infrastructure 2008, Invest Brisbane, Pages 7 and 8
18 Sustainable development and management of tourism in Moreton Bay, STCRC, page xii
Historically, the coastal fringes north and south of Brisbane City have performed different roles for the city and surrounding regions. Redcliffe, 40km north of the CBD was considered a seaside escape for the residents of Brisbane until transport developments in the 1970s changed the focus (a new bridge brought it closer to the city). Hence, it developed a strong day-tripper market. The Redlands area (30-40km SE of the CBD) was known as Brisbane’s food bowl. As the city expanded the area developed into a residential area with a strong family focus, and a higher proportion of technical tertiary students than the Queensland average.

The synergies between the coastal strips and the bay and the islands have been linked by ferry (point to point) transportation. Local Brisbane residents have utilised the bay and islands as their recreational playground. However, the accessibility of the Gold Coast and Sunshine Coast from Brisbane and good road infrastructure and subsequent lack of focus on Moreton Bay has meant tourism has developed far more slowly in the bay.

Now there is a perception that an opportunity exists to raise appreciation of the tourism industry by the local councils and communities. There is a sense that with improved resources for tourism development and associated public infrastructure, integrated visitor experiences can be achieved for the entire area; leveraging off marine, nature based experiences in Moreton Bay and the islands and with a staging post focus for Redcliffe, Cleveland and Caboolture.

For many, however, the perception is that Moreton Bay is part of Brisbane and suffers from being too close geographically. As such, the coastal strip along Brisbane’s Bayside area of Wynnum-Manly and in Redlands is known as an attractive area for recreational activities and where one might bring the family for fish and chips.

Similarly, one might take the family to the built lagoon in Redcliffe and enjoy the quality beaches which Redcliffe is able to offer for passive recreation.

These areas offer important and attractive recreational options for a local market but their urban built form and lack of iconic tourism experiences (either natural or built) make them less likely to grow an interstate or international market.

This can be turned around, however, if they can create and grow hallmark events and/or develop clusters of high quality products (wineries etc) which the market can differentiate and which ideally are unique.

The vision by 2018 will be to have a strong sustainable tourism industry with improved urban development to match the natural environment. It is also hoped that there will be opportunities for enabling partnerships on developments between the National Parks and the tourism industry, via QPWS and EPA.

The vision identified by Brisbane Marketing is for: “Moreton Bay to become the premier coastal eco-tourism destination in Australia.”

To achieve the vision, there is a need to:

- ensure infrastructure developments include new zones such as coastal strips and beaches in Redcliffe and Redland, Brisbane River for promenade and pier developments and enhanced ferry development;
- ensure that as part of an overall environmental management plan for the national parks and special areas, visitor needs are taken into consideration;
- ensure that waste water systems on the mainland are managed in order that no damaging sewerage or waste products are pumped into Moreton Bay;
- ensure that master planning in the urban coastal precincts allow for tourism product opportunities and avoiding large scale ribbon development along waterfront areas and lack of open spaces;
- undertake renewal of existing tourism product to ensure appropriateness for the demands of the key Moreton Bay and Islands area markets;

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19 Redcliffe Short-term Accommodation Strategy Report, Redcliffe City Council, by SGS Economics and Planning, June 2005, P1
21 Moreton Bay and Islands – Tourism Infrastructure 2008, Invest Brisbane, Page 3
construct new accommodation facilities and develop new tourism products, to cater for both day trippers and the overnight markets;

develop new tourism product which will be attractive to eco-tourists, in order to entice such visitors into the area and to encourage both dispersal and longer stays, thereby enhancing tourism’s economic contribution (whilst preserving a low environmental footprint); and

enhance the relationship between EPA/QPWS and the tourism industry to encourage and improve the national park experience for the visitor.

To achieve the vision and for visitors to identify the region as that described in the marketing brochures, there may be a need for the region to offer different experiences that better cater for the region’s target visitor markets, especially the upmarket eco-tourist.

Developments required to achieve higher numbers and better yields from the core and developing markets include:

- improving the transport infrastructure on the islands, especially pathways for walking and cycling;
- improve public transport within Moreton Bay generally;
- construction of quality piers on the Brisbane River with ancillary tourism services and products;
- ensuring greater collaboration between tourism and conservation organisations, especially for better yielding visitor experiences such as high quality tent camps etc within the National Park precincts;
- ensuring tourism industry operators are following environmental and general tourism best practice in regard to their own businesses and products sustainability;
- investing in a wider variety of accommodation types including exclusive boutique eco-resorts in order for visitors to spend more time in the Moreton Bay and Islands and to create more quality land-based experiences;
- enhancing the Moreton Bay and Islands with innovative action-based nature activities; and
- upgrading the look and feel of the coastal mainland beaches and towns in the bay through enhanced landscaping and streetscapes, offering extended car parking facilities and avoiding over development.

3.1 Regional uniqueness

Nowhere else in the world do wild creatures such as dugongs, sharks, dolphins, whales and migratory birds spend time in waterways in such close proximity of a major / capital city. Nowhere else in the world is there such a proliferation of sand islands just 35km from an urban conurbation of 2.67m people\(^\text{22}\). The area has a fragile eco-system which manages the at times competing interests of nature and environment vs. man and development.

A priority outcome for this RTIIP is to find special processes which allow EPA/QPW to re-evaluate the balance of their current conservation/environmental management projects to recognise limited opportunities for well planned, well designed and managed visitor programs.

Some unique elements of the Moreton Bay and Islands region which could be utilised for tourism purposes include:

- the world’s tallest and / or longest sand dune;
- the variety and friendliness (in general) of the marine creatures found in Moreton Bay Marine Park;
- the juxtaposition between being in a major city and within an hour of travel being on a National Park island;
- the proximity for creating an eco-resort haven so close to the Brisbane CBD; and
- acknowledging that Moreton Bay Marine Park is on the doorstep of a capital city.

Before any major infrastructure developments can occur over the next decade in the bay and on the islands, the EPA and QPWS must be comfortable with the type, size and scale and number of developments that may be possible. Tourism cannot progress opportunities until it was resolved what is feasible and acceptable within the remits of a National Park and a Ramsar wetlands.

Without further tourism development (primarily boutique in size) on Moreton and North Stradbroke Islands in particular, tourism growth to the bay will be limited to sea based experiences such as whale watching and other marine experiences.

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\(^{22}\) SEQ Regional Plan 2005 – 2026, Amendment 1, October 2006, Queensland Government, Office of Urban Management, Page 9 (for population figure)
An analysis of the strengths; weaknesses; opportunities and threats for the Moreton Bay and Islands area follows. The Analysis focuses on the potential competitiveness of the region for tourism investment.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marine mammal close-up experiences</td>
<td>Lack of a broader range of accommodation facilities</td>
</tr>
<tr>
<td>Sunshine Coast and Gold Coast very close for attracting interstate and international visitors (as well as Brisbane Region visitors)</td>
<td>Lack of visitor facilities on the islands, including lack of quality access points, walking trails, accommodation options and interpretation</td>
</tr>
<tr>
<td>Provides a complete contrast to the Brisbane City visitor experiences</td>
<td>Lack of visitor facilities at ferry terminals on the mainland</td>
</tr>
<tr>
<td>Action-based visitor activities like 4WD</td>
<td>Lack of visitor facilities at ferry terminals on the mainland</td>
</tr>
<tr>
<td>Bird havens in the bay and in the Ramsar area e.g. migratory, nesting etc.</td>
<td>Action-based visitor activities conflict with National Park ethos</td>
</tr>
<tr>
<td>Quality recreational fishing</td>
<td>Lack of quality eco-experiences on the islands to complement marine environment</td>
</tr>
<tr>
<td>Sweeping bay with vast number of beach options</td>
<td>Toondah Harbour development constraints</td>
</tr>
<tr>
<td>Koala habitats in Redlands</td>
<td>Lack of tourist-style restaurants, cafes and shops in Redlands, Redcliffe, Wynnum-Manly and Caboolture</td>
</tr>
<tr>
<td>The islands in Moreton Bay are an attraction in their own right</td>
<td>Redland City perceived as a fill in area between Brisbane City and Gold Coast</td>
</tr>
<tr>
<td>Safe environment for boating activities</td>
<td>The area has no iconic attractions to leverage off</td>
</tr>
<tr>
<td>Marine Park beside a capital city</td>
<td>Some islands (e.g. Russell) risk over development so unable to be environmentally sustainable</td>
</tr>
</tbody>
</table>

- Competition in Redlands from Gold Coast for access to southern Moreton Bay Islands with easy access and more operators
- Limited tourism focus to date in most areas of Moreton Bay
- Skilled staff shortage
- Lack of meeting facilities in Redlands and Manly areas and event facilities in Redcliffe
- The islands provide urban development and recreational facilities for locals not visitors
- Lack of good quality caravan parks on coastal strips around the bay
- Coastal strips heavily developed at Cleveland and Wellington Point
- Poor public transport linkages in Redland
- Lack of directional signage and visitor orientation/interpretation
- Lack of tour operators and related products
- Lack of public transport on North Stradbroke Island
- Tourism industry profitability variable
- Seasonality problems impacting on tourism business viability
- Lack of affordable housing on North Stradbroke Island
### Opportunities

- Significant eco-tourism opportunities
- Expanded marinas for the bay
- Quality ferry terminal in Brisbane for visitor transportation to the islands (see Brisbane City and Hinterland RTIIP)
- Redevelopment sites on the coast provide opportunities for visitor accommodation
- Cleveland Centre Master Plan (incorporating Black Swamp Wetlands and Showground)
- Harbour parks and urban boardwalks with interpretation, art, cafes, retail and potential for weekly markets
- New private boat launching facilities – separate from commercial/industrial
- Expansion of Manly Marina and associated marine retail and cafes
- Light rail link between Cleveland and Robina and in Redcliffe and improvement of public transport in general on the coast and between Bribie Island and mainland
- Flower industry opportunity for visitor tours in Redland
- Development of design guides for the villages on the islands to create a sense of place
- Creation of interactive entertainment and sporting facilities on Stradbroke Island (particularly for under 18s)
- Creation of additional cafes and restaurants on North Stradbroke Island when visitor numbers increase significantly
- Activities and information based around the world’s largest aquifers on Stradbroke Island
- Creation of lookout points with viewing platforms on North Stradbroke Island e.g. Dunwich
- Creation of a permanent quality camp site on North Stradbroke Island linked to island walks
- Improvements to the public street scape on the islands and the coastal areas and protecting the relaxed non urban feel especially on Moreton Island
- Re-introduce a major recreational fishing festival to the islands and bay
- Creation of a tourism pier at Dunwich
- Re-design of Bribie Island entrance from the mainland to screen industrial areas and create an appropriate island feel
- Encourage house boat investment for the Pumice Stone Passage
- New ferry operation between Bribie and Beachmere and Scarborough (from Bribie) to reduce travel times and offer circuit

### Threats

- EPA/QPWS management plans restricting development
- Conflicting aspirations at times between mainland and island communities
- Risk of overdevelopment (on the coast of Moreton Bay) if no master plan followed
- Managing the population swells on the islands during peak periods
- Lack of low cost staff housing for tourism and hospitality workers
- Insufficient customer service training for retailers, food and beverage outlets
- Slowness in undertaking rehabilitation of areas currently used for sand mining
- QPW proposal to restrict growth in commercial tour operators on the islands
- Restrictions on ferry operations and where they may be able to moor e.g. some jetties currently restricted to specific operators
- Potential conflict between encouraging more high-quality soft eco-tourism pursuits and hard adventure tourism products e.g. 4WD, jet skiing, powerboats
- Growth in residential urban development on Stradbroke and Moreton Islands and risk of residential focus reducing tourism appeal
- Moreton Bay Marine Park Zoning Plan Review may have implications for tourism infrastructure development within the Bay
5 Investment opportunities

5.1 The catalyst projects

As indicated above, there are ten recommended catalyst projects for the Moreton Bay and Islands area.

1. Creation of an eco-resort on Moreton Island;
2. Creation of an eco-resort on North Stradbroke Island;
3. Develop Caboolture Airfield as major visitor attraction and activity base for gliding flights, parachuting, scenic flights and high value rides in Warraways, the Tiger Moth and Mustang, together with redevelopment of existing air museum with links to e.g. Temora Air Museum etc;
4. Build extended marina facilities at Wynnum-Manly;
5. Bribie island marina expansion;
6. Redevelop Toondah harbour;
7. The development of major marine-based events at Woody Point at Redcliffe with offshore power boat racing and other similar types of activities;
8. Infrastructure redevelopment on Dunwich harbour, North Stradbroke Island;
9. Development of the jetty, interpretation facilities on Peel Island; and
10. Creating non-vehicle areas on beaches on Moreton Island.

Each of the catalyst projects are canvassed, in turn, as follows;

5.1.1 Eco-resort on Moreton Island

Moreton Island currently lacks higher quality and boutique commercial accommodation and because of the environmental sensitivities associated with the island and its national park status only small scale development is appropriate.

The unique environmental setting of the island offers an excellent opportunity to develop a high quality small scale eco-resort. The resort would need to incorporate environmentally sensitive and island style inspired accommodation units or safari style tents, and offer guests a range of nature-based and adventure experiences based on the island’s spectacular land and marine settings. There are a number of locations on the island across a range of different tenures that would potentially suit this low impact style of eco-resort.

5.1.2 Eco-resort on North Stradbroke Island

The consultants recommend the development of a discrete, small eco resort either at Point Lookout or Amity on North Stradbroke Island.

If North Stradbroke is to become a small hub for appropriate island accommodation generally within Moreton Bay then further accommodation is going to be warranted. This should be a variety of types, recognising the existing accommodation on the island. Further accommodation will also support restaurants and retail facilities which currently struggle. There is a lack of critical mass of commercial accommodation to support other forms of tourism development.

The Group also notes the mixed view held by some permanent residents on North Stradbroke who are unsupportive of tourism although a number derive financial benefit from business-related activities.

Over the next ten year period both local council and state government should actively encourage high quality discrete eco-focussed resort and lodge activity on North Stradbroke noting that most of the island is still commercially sand-mined and this is unlikely to change for the next 17 years.
5.1.3 Caboolture Airfield as major visitor attraction and redevelop existing Air Museum

Caboolture Airfield has started to position itself as a venue for historic aircraft restoration and as the hub for light aircraft training facilities in this general region. The opportunity exists to:

- master plan the airfield and surrounding area to cater for increased restoration and aircraft use;
- create provision for additional aircraft storage short and long term;
- to market and display the restoration activity as a visitor experience which needs to have an experienced guide;
- to upgrade and expand the existing aviation museum;
- to better promote the opportunity for viewing and flying in historic aircraft which are fully air worthy;
- to expand and promote the opportunity for light aircraft flight training, gliding etc; and
- to develop an area for short term accommodation associated with arrival and departure by light aircraft (self flown – land and park).

The closure of other airfields in the surrounding area is already placing pressure on utilisation of facilities at Caboolture Airfield. The mix of historic aircraft restoration, the museum, the ability to see historic aircraft in flight and for joy rides etc provide an interesting and regionally unique visitor attraction and experience. A similar experience can be found at Temora Airfield in regional New South Wales which could offer a twinning arrangement for marketing.

5.1.4 Marina facilities at Wynnum-Manly

To actively encourage and provide appropriate berthing facilities for the quickly growing recreational boating sector, extended marina facilities are needed urgently. The consultants recommend expansion of existing marinas facilities wherever possible in preference to creating new ones. The population pressures from South East Queensland and existing facilities at Wynnum-Manly provide the opportunities for expansion.

5.1.5 Bribie Island Marina expansion

The existing small-scale marina facilities on the Pumice Stone Passage between the mainland and Bribie Island should be expanded to cater for ongoing growth in the recreational vessel sector.

There is also a need to develop marina based retail and food and beverage facilities to extend the facilities on Bribie Island. The consultants note the limited range of food and beverage available on Bribie Island and the need to offer a discrete precinct.

5.1.6 Redevelop Toondah Harbour

There are major issues which need to be addressed in creating an appropriate ferry and heavy cargo harbour facility at Toondah. The area requires a pragmatic and extensive redevelopment.

Because of the multiple land ownership and associated problems in negotiating from the existing land ownership arrangement it is more likely that this can be successfully resolved by one party taking full control and totally redeveloping the entire site. This may need to be state government by virtue of the fact that a variety of state government agencies already have existing land holdings at Toondah Harbour.

What is needed is a dedicated ferry terminal facility which clearly separate out the facilities and services needed by passengers constituting visitors as well as residents living on the islands, vehicles going across to the islands for recreational and commuter purposes as well as the separate docking facilities and related heavy transport needs of sand mining industries and associated services.

5.1.7 Marine-based events at Woody Point at Redcliffe

There is a need for appropriate shore based infrastructure in the form of board walks, cafes, extended information facilities and car parking particularly to position the area as an event venue.
The consultants understand that the marine area off Woody Point has previously been used for marine based events including power boat racing etc. Because of the fragile marine ecology within Moreton Bay there are likely to be limited venues where major event-based activity can be facilitated.

Based on a feasibility to show sufficient demand, the opportunity exists to position Woody Point at Redcliffe as an appropriate venue for power and sailing boats events, regattas and associated festivals and potential air shows such as the Red Bull Aviation Challenge. The facilitation of major events and associated media coverage will act as stimulants to encourage local and other visitors to attend.

5.1.10 Vehicle-free beach areas on Moreton Island

The consultants consider that at the moment 4WD activity dominates to too great an extent and needs to be better managed. This also meets the eco focus which government agencies are keen to see for a more responsible approach by visitors. There are ample areas for people to go 4 wheel driving but the consultants consider that many of the areas opposite Bulwer and Cowan Cowan and other small villages on the west coast of Moreton Island should actually have only limited 4WD activity.

This is required to improve visitor safety, to enhance the quality of the experience for eco visitors and to add volume to the ecological significance of the island and its wildlife. There are ample places on the east coast where 4WD activity dominates.

5.2 Infrastructure limitations

Tourism investment growth will be held back unless issues identified to the consultants by infrastructure agencies and the regions’ stakeholders are addressed.

Specifically, in regard to infrastructure issues, there appears a need for:

1. improving/changing the transport infrastructure to and on the Moreton Bay Islands. This specifically includes ferries, piers and jetties, transportation options on the islands and interaction between the various transport modes to offer faster and more seamless travel.
2. improvement to public transport on the Moreton Bay coast e.g. redevelopment of rail stations, creation of light rail/trams on disused rail lines and more buses e.g. from Caboolture to Bribie Island and linking from Robina to Cleveland.
3. providing opportunities in appropriately defined locations within the island national parks for eco-accommodation to be built.
4. improving the management of wastewater within the bay area in order to ensure no/limited compromise to the marine environment.

5.2.1 Transport infrastructure to and on the Moreton Bay Islands

The existing transport infrastructure to the Moreton Bay islands is constrained by the staging posts particularly at Toondah Harbour and to a lesser extent, Scarborough. Both staging posts are quite some distance from the Brisbane CBD which is seen as a major limitation in encouraging particularly short break interstate leisure and business-related travel to the islands and the bay generally.

A dedicated ferry terminal at an appropriate location at the mouth of the Brisbane River would be a major stimulant to encourage greater visitation and ease of access. The consultants have assumed that existing ferry operators would fill the supply needs to meet current and forecasted visitor demand out to the islands. This assumes of course that this concept is commercially viable and that sufficient yield can be generated.

There is limited public transport support and services regularly on North Stradbroke Island and none on Moreton Island. The visitor is therefore dependent on transport provided by commercial accommodation operators linking in with ferry services. In addition, most visitors bring their own 4WD across because of the lack of alternative forms of transport.

With the ongoing activity of sand mining on North Stradbroke Island in particular, port related infrastructure (especially the separation of heavy vehicle movements from pedestrians and light vehicles) needs to be addressed.

As National Park dominated islands and a desire to achieve best practice environmental supporting infrastructure, wharf and access areas need to be upgraded particularly at Dunwich Harbour.
5.2.2 Public transport options for the Moreton Bay coastal towns

Limitations exist in the ability to travel by public transport from the Brisbane CBD to Redlands and Redcliffe. Bus services do not always link to rail making it difficult for those without private vehicles to access areas.

Consideration needs to be given to offering ferry services around the bay as an attractive alternative to road based transport particularly. Existing road congestion issues are unlikely to be adequately addressed by road based infrastructure upgrades over the next 10-year period. Longer term opportunities exist to offer light rail on the proviso that the remaining corridors available can be protected and preserved for this use and/or the use as bus transit ways linking to for instance Redcliffe and Scarborough in the short to medium term.

5.2.3 Opportunities for eco-resorts on the islands

The opportunity exists to create more boutique product particularly on Moreton and North Stradbroke Islands. Following on from the National Park focus the opportunity exists to create eco-lodges and small-scale developments including upmarket tent camps. By allowing well experienced and accredited eco operators to develop appropriate facilities particularly on Moreton and North Stradbroke Islands QPW will see the benefits in supporting initiatives which provide concession fees to support their operations on the islands as well as providing appropriate accommodation to attract a higher yielding visitor.

5.2.4 Management of waste water discharge into Moreton Bay

With much written about the fragility of the marine environment in Moreton Bay the consultants note the desire to improve management of wastewater discharge in particular. Issues concerning discharge were noted in the Sandgate-Shorncliffe area etc.

5.3 Additional infrastructure and investment projects

Additional infrastructure projects canvassed in this RTIIP include projects to:
1. secure skilled and semi-skilled staff;
2. develop new attractions and activities to generate longer lengths of stay;
3. expand the number of and upgrade the accommodation facilities catering to leisure and business visitor markets; and
4. introduce a public process for dealing with infrastructure blockages.

5.3.1 Secure skilled and semi-skilled staff

Like many regions within Queensland, Moreton Bay and Islands are suffering from an acute labour shortage for skilled and semi-skilled hospitality related staff. The Queensland Government has recognised that low skills throughout the labour force are a serious impediment to providing quality service. Areas within the Moreton Bay and Islands are undertaking programs to assist in securing and retaining staff with appropriate skill sets. Redland City Council (as Redlands Shire) has acknowledged the concept of good service and used Aussie Host (QTIC is the custodian of this customer service program) in training for the tourism industry – and has recently extended it to the wider community.

Operators on Moreton and North Stradbroke Island in particular have commented on the challenges experienced in trying to find and retain appropriately skilled staff in all areas of the hospitality and tourism sectors. This issue is also linked in to the issue of affordable accommodation for people wanting to live on North Stradbroke Island.
Unless the skills shortage can be adequately addressed, the ability to create new forms of tourism development and as proposed at a higher quality level may be seriously challenged if unable to find the personnel required to operate them.

### 5.3.3 Land use planning

The issue of competing sectoral interests (residential development, particularly on North Stradbroke Island, sand mining activity also on North Stradbroke Island and National Park policies for no development) provide a variety of challenges for tourism development in Moreton Bay along coastal areas and on the islands.

The size and scale of sand mining activity on North Stradbroke Island is a severe limitation on development of the bulk of the island until that activity has ceased (in 17 years time as estimated). Whilst opportunities may exist to allow for 4WD experiences in areas which previously have been sand mined (if safe and secure) the bulk of the island would appear to be out of bounds for tourism-related development for some time. The consultants do however note the positive attitude of the mining company (CRL) to working with the tourism industry and community to introduce complementary tourism development uses where this doesn’t conflict with mining activity.

Tourism development often needs an appropriate buffer zone around it to avoid conflicting with neighbouring land uses which can detract from the quality of the tourism experience. This is particularly needed in many coastal parts of Moreton Bay where residential and commercial expansion in the Redlands area from Victoria Point through to Wellington Point are likely to limit tourism activity to more passive local recreational needs. The coastal strip development and ongoing pressure to increase the height and bulk of waterfront development in particular will continue to put added pressures for tourism including the area through to Wynnum-Manly.

Similarly, the residential focus from Shorncliffe through Sandgate and around to Woody Point and then Scarborough Point means that tourism is in effect having to integrate with a variety of forms of residential and mixed use development. Many of these areas have attractive open parkland, boardwalks, recreational lagoons which all provide an attractive opportunity for local recreational pursuits. They do, however, provide limited opportunities for many traditional tourism-based developments unless opportunities exist to create hallmark events which can entice visitors.

Areas in Deception Bay such as Beachmere and smaller communities on the Pumice Stone Passage such as Toorbul and Donnybrook provide small-scale coastal villages with particular appeal to a local or regional market but with limited opportunity for tourism development. The challenge for many of these smaller coastal villages is the rapid urbanisation of the SEQ area and the continuing pressure for waterfront land. Unless great care is taken, the look and feel of many of these coastal areas will change dramatically and not necessarily for the better in a relatively short space of time.

To avoid inappropriate conflict with conservation aspirations particularly on Moreton Island, consideration should be given to creating dedicated tourism zones where low impact and higher quality tourism accommodation facilities in particular (focused on small scale eco-lodges, tent camps etc) should be located. To retain the look and feel of the small-scale villages on Moreton Island (Bulwer and Cowan Cowan etc) design guides and developmental constraints need to be considered. The same needs to be considered for Kooroongal at the southern point of Moreton Island.

Tourism development particularly in environmentally sensitive areas can often provide an appropriate interface between more traditional forms of urban development such as residential enclaves. Tourism zones require well-vegetated buffer areas to block out residential development where possible, especially when an element of exclusivity is required or where a more eco focussed style of product is proposed.

Land use planning for tourism needs to include carefully designed entry portals for example on to Bribie Island which currently is perceived an extension of the urban landscape from the mainland.

The extensive level of urban development which has occurred around Moreton Bay and which is an extension of Brisbane City and to some extent the Gold Coast, creates challenges for tourism to be created and developed where it needs to fit with a more traditional residential and commercial urban landscape. Much of the coastal area however as previously indicated provides good opportunities for local recreational needs.
As indicated earlier, there are more than 38 investment opportunities which have been considered by the consultants in the course of preparing this RTIIP. They are canvassed at Tables 6-14 in the Appendices Document that accompanies this RTIIP.

The investment projects have been assessed against the following criteria:

- strong level of interest amongst local stakeholders;
- Local Council support;
- infrastructure constraints manageable or resolvable in reasonable time frame;
- project supports the RTO vision for the Moreton Bay area;
- projects which address issues such as lack of attractions; and
- commercial investment opportunities possible in part or in whole.

The projects canvassed in the table cross into a number of sub-sectors of the tourism industry.

Table 3: The tourism industry sub-sectors – Investment projects

<table>
<thead>
<tr>
<th>The Sub-Sector</th>
<th># of Projects</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure</td>
<td>4</td>
<td>11%</td>
</tr>
<tr>
<td>Superstructure</td>
<td>4</td>
<td>11%</td>
</tr>
<tr>
<td>Attractions and activities</td>
<td>11</td>
<td>29%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>7</td>
<td>18%</td>
</tr>
<tr>
<td>Across the Sector – Strategic planning</td>
<td>3</td>
<td>8%</td>
</tr>
<tr>
<td>Transport and related services</td>
<td>4</td>
<td>11%</td>
</tr>
<tr>
<td>Across the Sector – Human resources</td>
<td>2</td>
<td>5%</td>
</tr>
<tr>
<td>Across the Sector – Marketing</td>
<td>1</td>
<td>3%</td>
</tr>
<tr>
<td>Across the Sector – Community</td>
<td>2</td>
<td>2%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>38</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

25 Within the 38 listed projects, some have multiple investment opportunities.
7 Next steps

To ensure that the vision for the Moreton Bay and Islands region is realised, many of the investment opportunities and infrastructure projects referred to in this RTIIP will need to be implemented by 2018. To ensure the effective and timely implementation of tourism investment opportunities a structure for driving the process is recommended below.

7.1 Action group and working groups

To ensure the implementation of the recommendations in this Plan, it is suggested that an Action Group be formed to oversee the development and pursuit of an implementation schedule. As noted earlier in the report, it is recommended that this Action Group is the same as the Group for the Brisbane City and Hinterland RTIIP.

- Ideally, the Action Group would be a public-private partnership, particularly given the need for a whole-of-government approach for many infrastructure projects.
- Government and private sector participants in the Action Group will, ideally, be represented by senior personnel only.
- The Action Group must aim to achieve tangible outcomes in the short and medium terms (next three year period).
- The Group should be supported by smaller working groups which will oversee the development and implementation of specific projects on a geographic basis.
- The region’s RTO will provide secretariat assistance to the Action Group: organising meetings; recording minutes of meetings; distribution of minutes of meetings and preparing press releases and other documentation etc.

Some issues for consideration are detailed on the following page.
### Table 4: Issues for consideration – The action and working groups

<table>
<thead>
<tr>
<th>The Action Group</th>
<th>The Working Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Its structure</strong></td>
<td>Formal or Informal</td>
</tr>
<tr>
<td><strong>Representatives</strong></td>
<td>A senior representative from the Department of Infrastructure and Planning as possible Chair&lt;br&gt;A senior representative of Tourism Queensland&lt;br&gt;A senior representative of the Investment Division of DTRDI&lt;br&gt;The Chair of the RTO or their nominee&lt;br&gt;A major investor or developer stakeholder&lt;br&gt;2 senior tourism industry (private sector) representatives&lt;br&gt;Representatives of other government agencies from time to time can be seconded for limited periods pending the needs of various projects (no more than nine members)</td>
</tr>
<tr>
<td><strong>Support, including secretarial services</strong></td>
<td>Provided by the RTO</td>
</tr>
<tr>
<td><strong>Meetings</strong></td>
<td>Every two months for first year and then quarterly</td>
</tr>
<tr>
<td><strong>Reporting</strong></td>
<td>Quarterly reports to stakeholders</td>
</tr>
<tr>
<td><strong>Reviewing</strong></td>
<td>Achievements reviewed every two years by DTRDI and TQ</td>
</tr>
<tr>
<td><strong>Activities</strong></td>
<td>Terms of reference&lt;br&gt;Represent the interests of the region rather than particular spheres of interest&lt;br&gt;A tourism forum in late 2008 to detail the infrastructure projects and investment opportunities&lt;br&gt;Develop an implementation schedule for the infrastructure projects detailed in this RTIIP: in the least, the strategy should confirm the priority of each project&lt;br&gt;Determine if projects need feasibility studies done and co-ordinate funding and completion of those feasibility studies&lt;br&gt;Identify potential investors for projects&lt;br&gt;Liaise with the investors&lt;br&gt;Establish Working Groups for each project&lt;br&gt;Work to overcome any barriers to completion of any project&lt;br&gt;Oversee the development and implementation of particular projects and report back to the Action Group&lt;br&gt;Identify specific infrastructure barriers</td>
</tr>
<tr>
<td><strong>Role of RTO</strong></td>
<td>Liaising with the Action Group&lt;br&gt;Lending secretarial assistance to the Group&lt;br&gt;Setting schedules for meetings and facilitating the meetings&lt;br&gt;Attending the meetings and recording what transpires at those meetings&lt;br&gt;Distributing reports to stakeholders and press releases, as appropriate</td>
</tr>
<tr>
<td><strong>Timing</strong></td>
<td>The first meetings of the Group should be held immediately after the official release of the RTIIP&lt;br&gt;Terms of reference confirmed by the Action Group by September 2008&lt;br&gt;First meeting no later than October 2008</td>
</tr>
<tr>
<td><strong>Location for Meetings</strong></td>
<td>Meetings in the regions&lt;br&gt;Working Groups established on geographic basis for projects&lt;br&gt;Meetings on site for projects.</td>
</tr>
</tbody>
</table>
7.2 An implementation strategy

One of the first steps for the Action Group should be to develop an implementation schedule for overseeing the commencement and progress of infrastructure projects canvassed in this RTIIP.

In the least, the schedule should detail:

- the priority order in which infrastructure projects should be approached;
- the likely stakeholders in the projects’ completion;
- a preliminary list of potential investors in the projects;
- an indication of the timing of the projects;
- an indication of the steps the Action Group will need to take to get the projects off the ground;
- the likely make up of any supporting working group;
- a determination as to whether a feasibility study is likely to be required; and
- performance indicators for the Group’s role in the development and implementation of the projects.

The Action Group and the working groups need to be integrated into the proposed implementation process for the Queensland Tourism Strategy. The Action Group could be a sub-group of the Destination Action Group for the region, as illustrated;
## Appendix: Investment opportunities

Table 6: Infrastructure projects – Sectoral analysis

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Building a new or extended marina at Manly or an appropriate location in the bay (Redcliffe Peninsula)</td>
<td>Marly (extended)</td>
<td>2010-2012</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Scarborough (extended)</td>
<td></td>
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<tr>
<td>2</td>
<td>Developing a series of high-quality walkways – accessible by foot and bicycle only – for the three main islands in Moreton Bay and attached to an appropriate flora or bird or marine activity</td>
<td>Bribie Island, Moreton Island, North Stradbroke Island</td>
<td>2010-2012</td>
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</tr>
<tr>
<td>3</td>
<td>Redeveloping Toondah Harbour</td>
<td>Cleveland</td>
<td>2010-2012</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Expanded airfield facilities on North Stradbroke Island</td>
<td>North Stradbroke Island</td>
<td>2012+</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>
## Table 7: Tourism investment opportunities – The accommodation sector

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
</table>
| 5 | Creation of an eco-lodge on Moreton Island | Moreton Island | 2011 | Need for higher end boutique eco accommodation  
Accommodation to be environmentally sensitive and small scale  
A range of potential sites need to be investigated |
| 6 | Creation of boutique eco-lodge on North Stradbroke Island | North Stradbroke Island | 2013 | Need to broaden range of accommodation  
Link to walkway development across island  
Limited existing 4 star accommodation already |
| 7 | 2-3 star hotels, low-rise with designs sympathetic to local environs | Beach chalets at Beachmere  
Apartment style hotel at Scarborough  
Apartment style hotel at Woody Point  
Boutique hotel at Victoria Point | 2010 | some proposed hotels/ apts mixed use development have Council approval  
need for accommodation to support small scale conference/meeting business etc  
primary markets most likely to be intra state and local |
| 8 | Developing apartment hotel complexes for Redcliffe | Redcliffe – coastal locations between Woody Point and Scarborough | 2010-2015 | A number of multi-use developments are proposed some with development approval from Council for the Redcliffe area with a focus on serviced apartments  
Strong support for tourism by the local council  
Recognition that Redcliffe provides the northern access point to Moreton Bay Island including for whale watching etc  
Need to ensure that there is an appropriate set back in height from the waterfront to ensure that other developments further back can secure water views |
| 9 | Build four new caravan and camping parks on or near the coast | Bribie Island  
Redcliffe  
Victoria Point environs  
Mount Cotton environs | 2010-2015 | Lack of caravan parks especially along the coast  
Need to encourage interstate drive tourists to stop bypassing the area of Moreton Bay and Islands  
Challenge of securing suitable land  
Can provide attractive income stream for Councils if parks do well |
| 10 | Creation of a permanent camp site on North Stradbroke Island | Around Blue Lake if possible | 2012 | Act as catalyst for walking trails development  
Need to carefully monitor impacts  
Deliberate avoidance of permanent structure  
Strong support by QPW required  
Commercial concession operation and revenue stream for QPW  
High quality tent village |
| 11 | 70-90 room hotel-serviced apartment complex | Wynnum Manly waterfront near marina | 2010-2012 | Additional quality accommodation needed to support tourism growth potential and to link to major marina expansion needs  
Base for Royal Queensland Yacht Squadron with visiting international vessels |
### Table 8: Tourism investment opportunities – Attractions and activities

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
</table>
| 12 Develop Caboolture Airfield as visitor attraction                    | Caboolture                         | 2010+                | - Reposition Caboolture Airfield as the SEQ aircraft restoration centre, aviation museum and light aircraft precinct  
- Extend storage hangars etc                                           
- Extend and upgrade museum                                             
- Link to Temora Airfield and Museum in NSW for twinning arrangement    
- Promote for passive and active experiences including museum tours,  
  tours of restoration centre, joy rides in historic aircraft, light  
  aircraft training etc                                                 
- Consideration for accommodation on site                                |
| 13 Investment into fleet of Houseboats for visitor use in the Pumice   | Bribie Island                       | 2012+                | - Need for more novel, low impact forms of accommodation  
- Encourages dispersal around Moreton Bay                               |
| Stone Passage                                                          |                                    |                      |                                                                                                                                                                |
| 14 Fish market and cafes                                               | Scarborough (Redcliffe)             | 2011-2012            | - Create tourism precinct focussed on fish market and related food and beverage outlets  
- Create hub to add to northern gateway to Moreton Bay Islands          |
| 15 Whale Watching tours                                                | Moreton Bay                        | 2011-2014            | - Evaluate appropriate number of tours for Moreton Bay operations with EPA  
- Provision of additional licences/boat operations for the whale  
  watching season in Moreton Bay                                        |
| 16 Cleveland Centre Master Plan (incorporating Black Swamp Wetlands and Showground) | Redland City                       | 2008-2009            | - Need to develop sustainable and attractive urban development linked to wetlands and open space areas                                           |
| 17 Pinklands Bush Reserve, Redlands                                    | Redland City                       | 2008-2009            | - Ensures maintenance of green buffer between the towns of the coastal fringe  
- Maintains the chance of koalas being able to stay in rural habitat  
- Extend tours for visitors who want to understand wild animals  
  within their own environ                                               |
| 18 Flower industry opportunity for visitor tours                       | Redland City                       | 2009-2012            | - Recognition of horticultural activity in Redland  
- Opportunity to develop tours, retailing etc of flower industry  
- Agri-tourism style development linked to wineries (Siromet etc) and  
  garden venues (Mt Cotton etc)                                         |
| 19 Creation of small scale interactive entertainment and sporting     | Lookout Point                       | 2010+                | - Need for facilities to meet local community and visitor needs  
- Multi-purpose sports/rec facilities for indoor events, sporting  
  activities, cinemas, evening entertainment                            |
| facilities on Stradbroke Island (particularly for under 18s)           |                                    |                      |                                                                                                                                                                |
| 20 Creation of new cafes and restaurants on North Stradbroke Island    | Lookout Point                       | 2012+                | - Need to increase critical mass of tourism product and encourage 7-day operations  
- Recognition of challenges to existing commercial viability of  
  cafes etc due to seasonality and lower yielding visitors  
- Need to make provision for growth and wider product mix               |
| 21 Activities and interpretive information based around the world’s    | Dunwich Harbour and Lookout Point   | 2011+                | - Creation of interpretation boards and directional maps highlighting key features and places of interest                                           |
| largest aquitanks on Stradbroke Island                                 |                                    |                      |                                                                                                                                                                |
| 22 Re-introduce a major fishing festival to the islands and bay         | Based out of Dunwich Harbour        | 2009+                | - Raise profile of islands and bay  
- Encourage media interest  
- Support accommodation and tourism businesses during low season period  
- Help address industry profitability issues and improve knowledge of  
  area                                                                |
### Table 9: Tourism investment opportunities – Transport

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Light rail link between Cleveland and Robina</td>
<td>Redland area</td>
<td>2013</td>
<td>Need to offer seamless public transport link to Toondah Harbour, and Redland coastal strip. Acknowledge bus link to train is interim existing step. Supports ongoing population growth of the area.</td>
</tr>
<tr>
<td>Improvement of public transport in general on the coast and between Bribie Island and mainland</td>
<td>Moreton Bay region</td>
<td>2013</td>
<td>Current reliance on self-drive due to lack of connecting public transport ex Brisbane CBD. Make areas such as National Parks and Bribie Island accessible for day trip (non self-drive market). Use remaining transport corridor land if possible. Investigate bus transit way option.</td>
</tr>
<tr>
<td>Extend ferry operation between Bribie and Beachmere and Scarborough (from Bribie)</td>
<td>Moreton Bay Regional Council</td>
<td>2011</td>
<td>Existing road infrastructure often congested. Offer alternative transport link around the bay. Need to test viability first with feasibility study.</td>
</tr>
<tr>
<td>&quot;Combie Trader&quot; (identify need for ferry between Scarborough and Moreton Island)</td>
<td>Moreton Bay Regional Council</td>
<td>2011</td>
<td>It is understood that the existing ferry operator will cease servicing the existing route. The future of the business is unclear. Need to test viability for this northerly gateway service from the mainland to Moreton Island with feasibility study to secure replacement service provider.</td>
</tr>
</tbody>
</table>

### Table 10: Tourism investment opportunities – Superstructure

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creation of lookout points with viewing platforms on North Stradbroke Island</td>
<td>Around coast and inland routes</td>
<td>2011+</td>
<td>Need to be able to stop, park safely, get visitors out to see and view interpretation. Includes seating and open-sided shelters. Could be linked via walking trail network.</td>
</tr>
<tr>
<td>Improvements to the public street scape on the islands and the coastal areas</td>
<td>All islands with residential development and mainland</td>
<td>2010+</td>
<td>Develop design guides to create sense of place and uniqueness. Need to avoid traditional urban streetscape form.</td>
</tr>
<tr>
<td>Creation of a tourism pier at Dunwich</td>
<td>North Stradbroke Island</td>
<td>2010</td>
<td>Improve visitor access and arrival point to island. Address safety issues. Offer visitor under cover shelter, interpretation, information etc.</td>
</tr>
<tr>
<td>Re-design of Bribie Island entrance from the mainland</td>
<td>Bribie Island</td>
<td>2010</td>
<td>Need to create a more welcoming entrance portal to the island. Need to screen industrial areas near entrance. Need to create sense of arrival; something special.</td>
</tr>
</tbody>
</table>

### Table 11: Tourism investment opportunities – Marketing

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introducing directional and interpretive signage</td>
<td>Throughout entire region of Moreton Bay – both islands and coastal strip</td>
<td>2009-2013</td>
<td>Improved motorway signage is required. Improved arterial road directional signage required. Need to introduce interpretative signage as passive visitor information value add-on.</td>
</tr>
</tbody>
</table>
### Table 12: Tourism investment opportunities – Community

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>Introducing a community awareness program</td>
<td>Island communities</td>
<td>2010+</td>
</tr>
</tbody>
</table>
|         |                                            |                      | - Improve community understanding of tourism and its benefits  
|         |                                            |                      | - Provide information (brochures) to island residents on value of tourism via local jobs, spend, investment etc  
|         |                                            |                      | - Need to develop positive attitude towards tourism  |
| 33      | Introducing affordable housing for workers  | North Stradbroke and Moreton Islands | 2009    |
|         |                                            |                      | - Lack of accommodation for tourism and hospitality workers  
|         |                                            |                      | - Need for addressing issue ASAP  |

### Table 13: Tourism investment opportunities – Strategic Planning

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>34</td>
<td>Development of design guides for the villages on the islands</td>
<td>All islands</td>
<td>2009</td>
</tr>
</tbody>
</table>
|         |                                            |                      | - Need to prescribe village feel where possible  
|         |                                            |                      | - Develop elements of uniqueness  
|         |                                            |                      | - Community consultation vital  
|         |                                            |                      | - Integrate into town planning strategies  
|         |                                            |                      | - Specify look and feel, bulk and scale etc  |
| 35      | Masterplan for the villages on Moreton Island | Moreton Island | 2010    |
|         |                                            |                      | - Develop masterplan for coping with increased visitation to the island  
|         |                                            |                      | - Cover all aspects of utility supply, waste management, recycling, introduction of environmental best practice  |
| 36      | Masterplan for the villages on North Stradbroke Island | North Stradbroke Island | 2010    |
|         |                                            |                      | - Develop masterplan for coping with increased visitation to the island  
|         |                                            |                      | - Cover all aspects of utility supply, waste management, recycling, introduction of environmental best practice  |

### Table 14: Tourism investment opportunities – Human resources

<table>
<thead>
<tr>
<th>Project</th>
<th>Locations</th>
<th>Indicative timeframe</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>37</td>
<td>An Up-Skilling Program</td>
<td>Coastal Areas, Islands</td>
<td>2010</td>
</tr>
</tbody>
</table>
|         |                                            |                      | - There is a need to up-skill many tourism sector players, particularly people working in retail, restaurants and tour operations for what is required regarding service standards  
|         |                                            |                      | - Higher service standards are required if the region is to become and remain competitive  
|         |                                            |                      | - An up-skilling program should be developed and implemented in the region  |
| 38      | Employment and skills audit                | Islands in particular but also coastal strip around the bay | 2009+    |
|         |                                            |                      | - Shortage of skilled staff already noted  
|         |                                            |                      | - Need for skills audit to identify gaps, especially if sector growth  
|         |                                            |                      | - Need to look at multi-skilling opportunities, especially on islands  |
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Appendix 3: Stakeholders consultation ....................................................................... 20
This Tourism Action Plan for the Scenic Rim (the TAP) forms part of the wider RTIIP prepared for Brisbane City and Hinterland. As part of the RTIIP it was agreed that due to other tourism planning projects under way for the Scenic Rim area, a specific product development plan should be undertaken.

The Scenic Rim comprises the local governments of Scenic Rim Regional Council and Ipswich City Council. It incorporates existing tourism clusters such as the seven national parks – now incorporated into the World Heritage Area known as Gondwana Rainforests of Australia, as well as the townships of Beaudesert and Boonah and Queensland’s oldest provincial city at Ipswich.

The Scenic Rim has different infrastructure and tourism investment requirements to other parts of the Greater Brisbane region. As part of the research, analysis, consultation and focus group discussions undertaken by TheStaffordGroup (the Group) different development opportunities were considered for the Scenic Rim. Ultimately, those most likely to succeed over the next ten years have been incorporated into the preparation of an Action Plan for the Scenic Rim.

The literature review, focus group consultations and individual interviews identified the following key points in regard to the Scenic Rim.

- Primary markets are SEQ and Northern NSW (couples and families with young children and mid life households 45-64 years)
- Secondary market is metro Brisbane (“dinks” with household income $70k +)
- Short breaks and short lead times for booking are increasing
- Overnight market share is declining and day trippers growing
- Investment in new product has slowed and mostly it is small business
- No icon tourism products or hallmark events have yet been created in the area
- Co-operative advertising spend is declining
- Lots of plans (paralysis by analysis) but no real traction
- Strong urban growth in SEQ but a more discerning market
- Uncertainty as to whether the region is far enough away to actually escape SEQ

It is intended that the opportunities identified will assist in attracting more primary and secondary source market visitors and overcome some of the issues acknowledged during this plan’s development. The projects should all be contemplated regardless of the infrastructure constraints noted in the Brisbane City and Hinterland RTIIP. However, it may be necessary to consider the impacts on proposed projects in this TAP should the major infrastructure limitations identified in the RTIIP not be completed in the short term.

Tourism development opportunities have been grouped under the following headings in this TAP.
- Strategic marketing (Table 1)
- Attractions and activities (Table 2)
- Accommodation facilities (Table 3)
- Retail-ancillary services (Table 4)
- Infrastructure (Table 5)
- National Park (Gondwana World Heritage sites) specific related tourism opportunities (Table 6)
The Group has provided suggested timings for each of the actions. Due to a number of factors, the timings for various opportunities could change over time and therefore needs to be reviewed regularly.

Factors that may impact include the following:

- Changes due to new Regional Council strategies and priorities as of 15 March 2008.
- Economic drivers (other industries) which may increase or limit tourism potential in a specific location and which are unknown at this stage.
- Economic conditions which may attract different types of tourism operators and developers.
- New projects facilitated as fast track initiatives by Government agencies, such as Queensland Water Infrastructure (QWI) dam developments or Department of Main Roads bypass roads.

This TAP identifies over 30 new development opportunities for tourism together with elements of general recreation for the local community. Pre-feasibility and feasibility studies are needed to test their commercial viability.

It is also important to note that this TAP focuses on tourism rather than general recreation opportunities. That is, the identification and creation of products and services which will entice more intrastate, interstate and international visitors to come to the Scenic Rim areas to spend more, stay longer and generate greater employment and investment opportunities.

**Background**

The area surrounding the SW of Brisbane known as the Scenic Rim could be described as a “hidden gem”. Due to its proximity to Brisbane City, and as it is part of the Brisbane Region RTO, it may traditionally have been difficult for the area to position itself from a marketing perspective, separate to “the city”. In addition, most domestic and international holidaymakers have historically associated Queensland (in particular South East Queensland) as a state/region of beaches, sun and surf. However, with changing consumer preferences for short breaks and pampering holidays, increased numbers of low cost carriers flying into Brisbane and Gold Coast Airports and improving road infrastructure between the populous “coastal strip” and the SEQ/Brisbane hinterland, the potential for the Scenic Rim to excel as a tourism zone is high.

The area is best described as one with spectacular scenery, memorable drives, country charm and village atmosphere, food and wine trails and good country pubs, pockets of antique stores, boutique retailing and creative arts and a quality walking and climbing zone within the national parks.

Tourism statistics for the area are limited, due to Scenic Rim data being included as part of the Brisbane Region for the purposes of International Visitor Survey and National Visitor Survey analysis. Similarly, Australian Bureau of Statistics accommodation data is available publicly only at a Tourism Region level. Utilising Tourism Research Australia’s Tourism Profiles for Local Government Areas in Regional Australia, it is possible to extrapolate figures for Ipswich and Beaudesert 1.

The 3-4 year averaged figures to June 2007 are shown in the table on page 6. The table highlights the opportunity the Scenic Rim has to improve its yield from tourism and the development opportunities. For example, the average stay (nights) and average spend per trip are both lower than the state average, requiring actions to change this.

There is evidence therefore that new product and enhancement to existing product is needed. The TAP opportunities that are outlined later in the report are intended to achieve better yields, as well as increase overall numbers to the area. However, because of the limited information available particularly for assessing visitor numbers, it will be imperative that more detailed analysis is undertaken as part of any potential feasibility studies required for the opportunities identified within this TAP.

---

1 Tourism Profiles for Local Government Areas in Regional Australia were first produced by Tourism Research Australia in early 2008. Data from the NVS and IVS were used to create the profiles. Only those LGAs (300 out of 500) with an adequate sample size from these surveys had profiles created (Boonah, for example, is not included).
Visitor statistics for the Scenic Rim (parts of) – Year ending June 2007

<table>
<thead>
<tr>
<th>LGA</th>
<th>International Travel</th>
<th>Domestic overnight travel</th>
<th>Domestic day travel</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Former Beaudesert Shire</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitors ('000)</td>
<td>18</td>
<td>158</td>
<td>827</td>
<td>1,003</td>
</tr>
<tr>
<td>Visitor Nights ('000)</td>
<td>174</td>
<td>361</td>
<td>--</td>
<td>535</td>
</tr>
<tr>
<td>Spend ($million)</td>
<td>10</td>
<td>55</td>
<td>57</td>
<td>122</td>
</tr>
<tr>
<td>Average stay (nights)</td>
<td>9.6</td>
<td>2.3</td>
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<td></td>
</tr>
<tr>
<td>Average spend per trip ($)</td>
<td>543</td>
<td>345</td>
<td>69</td>
<td></td>
</tr>
<tr>
<td>Average spend per night ($)</td>
<td>56</td>
<td>151</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City of Ipswich</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitors ('000)</td>
<td>11</td>
<td>174</td>
<td>688</td>
<td>873</td>
</tr>
<tr>
<td>Visitor Nights ('000)</td>
<td>161</td>
<td>463</td>
<td>--</td>
<td>624</td>
</tr>
<tr>
<td>Spend ($million)</td>
<td>11</td>
<td>43</td>
<td>46</td>
<td>100</td>
</tr>
<tr>
<td>Average stay (nights)</td>
<td>14.2</td>
<td>2.7</td>
<td>--</td>
<td></td>
</tr>
<tr>
<td>Average spend per trip ($)</td>
<td>1,001</td>
<td>250</td>
<td>67</td>
<td></td>
</tr>
<tr>
<td>Average spend per night ($)</td>
<td>70</td>
<td>94</td>
<td>--</td>
<td></td>
</tr>
</tbody>
</table>
Tourism product development context

Anecdotal feedback from a number of stakeholders both within the Scenic Rim and externally (particularly in the Greater Brisbane area) indicated confusion over what actually the Scenic Rim was defined as. In order to put the area in question into a comfortable context the Group received information from senior tourism development officers within the Scenic Rim to assist.

The dictionary definition provided is that the Scenic Rim is a group of mountain ranges, part of the Great Dividing Range in South East Queensland. These ranges include the Little Liverpool Range, the Main Range, Mistake Ranges, the McPherson Range, the Tweed Ranges and the Border Ranges. The mountainous landscape forms a quarter circle position roughly from south of Toowoomba around to Springbrook. Lever’s Plateau in New South Wales and the Lamington Plateau are also part of the rim formation.

The McPherson Range is an extensive mountain range, being a spur of the Great Dividing Range, heading in an easterly direction from near Wallangarra to the Pacific Ocean coastline. Wilson’s Peak is considered to be the intersection of the Great Divide and the McPherson Range.

Other key peaks within the Scenic Rim include Mount Barney and Mount Lindsay.

Part of the challenge is that for many visitors it is very difficult to see that the Scenic Rim is part of the rim of a semi circle of extinct volcanos. Whilst a number of stakeholders were very familiar with the Great Dividing Range and the McPherson Range, the use of the term “Scenic Rim” was far less known and people struggle to understand its starting and end point.

With the recent Local Government amalgamations and the change in name to Scenic Rim Regional Council this will assist in having the Scenic Rim name used far more widely.

Boonah

Boonah which is now part of the Scenic Rim Regional Council is strategically located near the base of the Scenic Rim Mountain Range. Boonah is a highly attractive small rural town which has managed to retain an appropriate country look and feel. It is also the base for a large agricultural sector with high quality produce grown in the surrounding area.

From a tourism product development perspective it is important that the look and feel of Boonah is retained and protected for the future. As an attractive two hour drive experience from Brisbane there is a lack of tourism product including visitor experiences in particular. Whilst there is high quality produce there are very limited farm gate experiences. Whilst there are fresh produce outlets in locations such as Aratula on Route 15 over the Great Dividing Range to Warwick and the Southern Downs region, visitors are keen to find experiences where they can buy from the farm gate including picking one’s own produce.

In addition, some of the small surrounding villages such as Kalbar have attractive heritage buildings which are being restored.

Tourism product development opportunities particularly for Boonah area need to focus on smaller scale tourism ventures with lower capital investment requirements. Whilst opportunities do exist for additional forms of commercial accommodation these also need to be of an appropriate boutique scale to reflect visitor numbers, and the fact that the area is a highly attractive hinterland available to those in South East Queensland in particular for recreational purposes.

The road network through from Ipswich and the Beaudesert loop roads to Boonah are of good quality. What is required however are more lay-bys providing more interpretative information about the history of the area, the vistas of Scenic Rim Mountains as well as the highly attractive farming based countryside. The completion of the loop road from Kooralbyn through Cannon Creek linking into Boonah would certainly assist in providing another attractive touring circuit and provide further support for the resort facility at Kooralbyn.

The theme for the Boonah area should focus around the concept of high quality produce and gastronomy experiences. This may be in the form of a series of unique food and wine festivals and events, the encouragement of country pub food and beverage experiences and linking these to the unique history and heritage of the area as experiences in Boonah itself as well as nearby villages such as Kalbar.
With respect to key product opportunities for Boonah and environs, consideration should be given to:

- developing a series of slow food events (the long lunch etc.) which build on the gastronomy and high quality produce available in the area;
- creation of a series of farmers’ markets and other events which start to become synonymous with produce quality and which actively encourage the Brisbane-South East Queensland market to visit for day experiences in particular;
- development of small scale micro industry facilities associated around food and produce including a small cheese processing and retail facility, an ice cream processing and retail area, a food emporium focused on selling produce at wholesale rates;
- additional backpacker accommodation to cater not only for the backpacker market but also those involved in seasonal produce picking (fruit and vegetables);
- creation of a network of caravan and camping parks including one on the edge of Boonah;
- dependent on lake levels at Lake Moogerah the opportunity for water based recreational activities (kayaking, small scale yachting etc.); and
- completion of a network of horse trails and mountain biking trails in particular around the edge of the Scenic Rim and which encourages visitor movements between the various villages in the area.

As previously indicated, it is particularly important that development is focussed at a small and manageable scale so that tourism can be developed on a sustainable basis for the future. From a visitor adrenaline / adventure experience perspective the opportunity exists to create a climbers’ centre near Mount French for rock climbing as Mount French is already well recognised as a strategic location for this form of activity nationally.

**Beaudesert**

The other major component of the new Scenic Rim Regional Council is the previous Beaudesert Shire. Beaudesert is already recognised by many as the gateway to the Scenic Rim National Park experiences. With the major bypass road planned for Beaudesert this will help retain the attractiveness of the town itself and allow for more pedestrian friendly infrastructure and experiences. Beaudesert has an attractive Arts Centre which provides a focal point in the town as well.

The road over Tamborine Mountain to Beaudesert provides an attractive drive experience with wonderful vistas. In addition, the eclectic building style on the top of Tamborine Mountain provides a stopping point for food and beverage opportunities and a chance to admire the views.

At the base of the Tamborine Mountain nestled in the valley is Canungra which should be enhanced and positioned as the staging post to Lamington National Park and the primary Scenic Rim walking experiences. There already exist high quality tourism facilities such as O’Reillys. However, Canungra itself is a small village that would benefit from a variety of enhancements to position it as an appropriate staging post. This would necessitate improvements to signage, street beautification, and development of further accommodation facilities over the next ten year period to meet the outdoor adventure market requirements.

New product development opportunities also need to be looked at either on the periphery or within the National Parks. Traditionally, Queensland Parks and Wildlife (QPW) has preferred any development to occur outside of Park boundaries. However, with the opportunity to maximise the world heritage status of Lamington National Park and the surrounding National Parks both within Queensland and New South Wales the opportunity needs to be explored with QPW for a series of high quality walking trails.
Consideration also needs to be given to a network of eco-friendly huts or tent camps to provide safe and appropriate accommodation for small groups of walkers enjoying the various trail networks. Opportunities also exist for horse trekking experiences and mountain biking on appropriate tenures.

The success of major walking trails in Victoria, Tasmania (Cradle Mountain for example) and the Milford Track in New Zealand are examples of best practice that recognise the social, environmental and economic benefits which improved sustainable access into National Parks can provide.

Locations within the Lamington National Park including the Lost World Valley etc. provide for high quality trekking experiences within 2.5 hours of the major South East Queensland urban conurbation.

Ipswich

As the major urban area and the gateway to the Scenic Rim mountains from the north, Ipswich holds a particularly strategic position in the development and positioning of the Scenic Rim and Hinterland area generally.

The product development focus for Ipswich should build on the existing strong products associated with transport and including the Ipswich Railway Workshops and Museum, the Ipswich Motorsport Precinct (incorporating Australia’s premier Championship Drag Racing Complex, Willowbank Raceway, and the Queensland Raceway), the Amberley Air Force Base and the Bremer and Brisbane Rivers.

The railway workshops are well recognised as a visitor experience of national significance with a particularly strong heritage focus. There are a number of opportunities to expand the Museum facilities as well as adding further amenities which can utilise the large scale and (currently) disused railway workshop buildings. Ipswich has the potential to build on the heritage railway theme (create a tourism precinct with conference and accommodation facilities) as the Railway Workshop Museum is a large, high quality facility. There is also the opportunity to use the existing railway workshop attraction as an anchor for a wider tourism precinct (if private sector investment is allowed) and link via cycleways, pathways and possibly tram-light rail to the CBD i.e. Transport attraction excitement;

The Strategic Development Plan for Ipswich released in 2008 highlights many of these opportunities as well (the opportunity to create a tourism hub around the railway workshops with a link to the Ipswich town centre). Consideration has been noted in the Council’s Strategic Plan and Vision as well as identified as part of the Brisbane City and Hinterland RTIIP for a people mover (light rail, tram etc.) to provide a novel but practical form of transport to link the two more closely.

In addition, the Ipswich town centre and its high quality riverfront development provide further opportunity for accessing and utilising the Bremer and Brisbane Rivers for water-based experiences. These could include a base for river kayaking ventures, a slow river cruise vessel or a jet boat style of operation noting that parts of the river system are shallow at various times of the year making navigation challenging.

The Ipswich Motorsport Precinct is a facility recognised as serving the needs of not only South East Queensland but also Northern New South Wales as well as other markets north of Brisbane. The opportunity exists to enhance the facilities and subsequently increase the utilisation of the motor racing and supplementary facilities.

The opportunity also exists to encourage improved and more regular rail services between Brisbane CBD and Ipswich dependent on market demand. A key enhancement required would be the upgrade of the Ipswich Railway Station as a key portal entry point into the area.
The Amberley Air Force Base is being significantly expanded in its capability and is a major defence force facility. Consideration should be given to utilising areas on the periphery of the Air Force Base (on the proviso that security is not compromised and with the support of the Air Force) to allow an aviation experience. This may be in the form of annual events, aviation focused visitor attractions including the use of a simulator and if possible flight experiences. Though there are obvious limitations in being able to utilise areas in and around the Air Force Base it has the potential to be both a passive and active visitor attraction and adds to the transport related theme for Ipswich.

Ipswich also has a strong cultural focus including a significant performing arts community and a strong history associated with the coal mining sector. These cultural heritage and contemporary experiences add to the attraction of Ipswich particularly building on the transport theme.

The challenge however for Ipswich from a tourism planning perspective is its geographic location and position; being surrounded by major motorways. In addition, its close proximity to Brisbane (less than one hour’s drive depending on traffic conditions), mean for many people in South East Queensland Ipswich may be too close to appeal as a getaway. However, its strategic location close to Brisbane and the large South East Queensland urban conurbation including the Gold Coast makes it ideal as a day visitor experience for these markets. Ipswich however needs to encourage more overnight visitor stays to support growth in the accommodation sector and to encourage more people to experience the various visitor attractions on offer.

Ipswich City Council has been investigating the development of a major conference-convention centre on the basis that this will provide a further mechanism to encourage more visitors to stay longer and subsequently increase visitor yield.

A key requirement for Ipswich is to develop a set of attractive gateways which lead to Ipswich from the various surrounding motorways. The specific visitor experiences noted above, with appropriate marketing, should provide the impetus for visitors to travel to Ipswich. The creation of gateway portals exiting the motorway, with attractive signage will help overcome a perception in some markets that Ipswich still has an industrial rather than leisure or tourism focus.

Ipswich’s strategic and proactive City Council is well aware of these challenges and recognises the importance of appropriately addressing them.
Appendix 1: Tables of potential tourism development opportunities

<table>
<thead>
<tr>
<th>Breakdown of actions</th>
<th>Timing</th>
<th>Performance measure or benefit</th>
</tr>
</thead>
</table>
| **1.1** Re-branding exercise for positioning the whole area as the Scenic Rim: requiring new communication campaign, new collateral, website (see 1.3 below). Undertaken in conjunction with some of the other priority (level 1) projects. Undertake community meetings and include new councillors in the two local councils. | By 30/6/2009 | • Raise appreciation of the tourism industry by both local authorities and communities  
• Brand awareness by key source markets, including ensuring The Scenic Rim name is understood based on interpretative volcanic rim stories and marketing themes  
• Greater collaboration between communities of the Scenic Rim and more understanding by residents of the benefits of tourism  
• Ensure communication strategy is aligned with the Brisbane Marketing and SEQC plans and brand managed by TQ and Brisbane Marketing  
• Develop new collateral to include brochures, maps, website etc. to ensure consistent Scenic Rim themes and messages  
• Align with existing Scenic Rim Tourism Marketing Plan (including incorporating budget cost) |
| **1.2** Gather community support for maintaining Boonah as a true regional town, with no major supermarkets or fast food chains. At the same time encourage local stores to sell local produce and stay open longer on more days | On-going | • Appropriate public stance taken by Scenic Rim Regional Council and developers  
• Local produce given more prominence in local community  
• Positioning of town and region as an area to experience quality local home-grown products  
• Increased spend in town retailers by visitors  
• Stores open on more days and for longer hours |
| **1.3** Link Scenic Rim websites and SEQC web-site to profile tourism activities and general recreational activities available in the Scenic Rim | By 31/12/2008 | • All relevant tourism and recreational data gathered and collated for the re-vamped website  
• Relevant material on Queensland Parks & Wildlife Service and on National Parks and World Heritage sites linked via a website  
• All tourism operators in the Scenic Rim encouraged to link their own websites to the Scenic Rim website  
• Ensure website links through to TQ’s SEQC website  
• Information from all relevant agencies including the new councils and information from key Government agencies included  
• Higher volume of website traffic and on-line bookings from website  
• Consider alignments with neighbouring destinations and products e.g. Gold Coast’s Hinterland Food and Wine Trail |
### Breakdown of actions

#### 1.4
Creation of an annual arts festival celebrating regional artists that will attract visitors specifically to it (to be held at the Beaudesert Arts Centre).

- **Timing:** By 31/12/2009
- **Performance measure or benefit:**
  - Greater awareness of, and better utilisation of, the Arts Centre by visitors (including repeat visitation)
  - Encouragement of other tourism developments e.g. accommodation to account for more overnight visitors to the area
  - Potential to create repeat visitation from intrastate drive tourists who will have another reason to return to the Scenic Rim each year, to participate in a different activity (other than wine and food trails, walking trails and pampering)

#### 1.5
Creation of packages which have commissionable product. Such products should come from other TAP projects.

- **Timing:** By 31/12/09
- **Performance measure or benefit:**
  - Greater interest from wholesalers and Ground Handling Agents to sell the area
  - Increase in bookings and increase length of stay
  - Better collaboration between industry players
  - Better linkages of product e.g. walking tours, drive trails

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### Table 1: Strategic marketing cont.

<table>
<thead>
<tr>
<th>Breakdown of actions</th>
<th>Timing</th>
<th>Performance measure or benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creation of an annual arts festival celebrating regional artists that will attract</td>
<td>By 31/12/2009</td>
<td>Greater awareness of, and better utilisation of, the Arts Centre by visitors (including repeat</td>
</tr>
<tr>
<td>visitors specifically to it (to be held at the Beaudesert Arts Centre).</td>
<td></td>
<td>visitation)</td>
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<tr>
<td></td>
<td></td>
<td>Encouragement of other tourism developments e.g. accommodation to account for more overnight</td>
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<td></td>
<td></td>
<td>visitors to the area</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Potential to create repeat visitation from intrastate drive tourists who will have another</td>
</tr>
<tr>
<td></td>
<td></td>
<td>reason to return to the Scenic Rim each year, to participate in a different activity (other</td>
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<td></td>
<td></td>
<td>than wine and food trails, walking trails and pampering)</td>
</tr>
<tr>
<td>Creation of packages which have commissionable product. Such products should come</td>
<td>By 31/12/09</td>
<td>Greater interest from wholesalers and Ground Handling Agents to sell the area</td>
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<tr>
<td>from other TAP projects.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Better collaboration between industry players</td>
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<tr>
<td></td>
<td></td>
<td>Better linkages of product e.g. walking tours, drive trails</td>
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</tbody>
</table>
### Table 2: Attractions and activities

<table>
<thead>
<tr>
<th>Breakdown of actions</th>
<th>Timing</th>
<th>Performance measure or benefit</th>
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</table>
| **2.1** Creation of a leisure and business tourism precinct at the Railway Workshop Museum **THIS IS A PROPOSED CATALYST PROJECT – FULL DETAILS IN REPORT (S6.1.7)** | Staged from 2009 onwards | - Consider the possibility of linking (for temporary exhibitions and loans) with the National Railway Museum in York, England  
- Raise the awareness of the museum and its activities to encourage more people from SEQ coast to visit  
- With temporary exhibitions in place repeat visitation is more likely  
- Ipswich needs a larger meeting venue and it could be logical to incorporate on the railway site, both for land use and activity purposes  
- A further quality 4-star hotel will benefit business tourism to the city |
| **2.2** Small scale food production and retail outlets e.g. Cheese factory, ice-cream factory (emphasis on using local agricultural products and selling at a local level) at Boonah | By 2009-2010 | - Adds to area's tourism food and wine emphasis  
- Visitor add-on experience  
- Assists local agricultural industry |
| **2.3** Development of Bremer River in Ipswich for recreational pursuits and construction of pier for leisure trips out of Ipswich | By 2011 | - Develop walking paths with picnic areas and public toilets  
- Construct a pier with attached visitor information kiosk  
- Provision for mobile food kiosks  
- Visitor experience enhanced for the city and benefits to the residents |
| **2.4** Development of Wyaralong Dam lookout and interpretation for viewing of new infrastructure construction | By end 2009-mid 2010 | - Buy-in from local community on new infrastructure  
- Raised awareness in visitors of SEQ and water requirements  
- Additional activity for the area |
| **2.5** Non-motorised water activities on newly constructed Wyaralong Dam | 2012 | - Increased recreational activities undertaken by both residents and visitors  
- New tourism product which would encourage longer stays in the area  
- Potential for educational visitation i.e. school and community group (scouts etc) trips |
| **2.6** Expansion of motor sport precinct at Ipswich including on-site hotel, upgraded amenities | 2015 | - This niche market for the Scenic Rim, attracting visitors who may be interested in different experiences than those found elsewhere in the area  
- Therefore, market this activity separate to other Scenic Rim activities  
- It is one of the few motor racing circuits in northern NSW and SEQ; could enhance its reputation and lengthen visitor stay with e.g. accommodation equivalent to a Formula 1 Motel  
- Has a dedicated following which could be increased  
- Part of the Ipswich transport theme for promotion i.e. Railway museum and precinct, motor racing circuit, air force base, Bremer and Brisbane River potential jet boat excursions |
| **2.7** Amberley Air Force Base | 2015 | - Potential for an activities based museum/attraction as a subsidiary to the main RAAF Museum in Victoria  
- Opportunities could include modern aircraft displays, simulator rides, space shuttle information, etc  
- Dependent upon capability for interaction between visitors and largest operational base for RAAF  
- Further leverage off the activities of the RAAF Base Amberley (i.e. Amberley Air Show proposed observations deck) |
### Table 3: Accommodation

<table>
<thead>
<tr>
<th>Breakdown of actions</th>
<th>Timing</th>
<th>Performance measure or benefit</th>
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</table>
| 3.1 Creation of quality caravan park close to Boonah town centre and other locations in the Scenic Rim, including the possibility of lakeside and dam-side parks at Maroon and Wyaralong Dam | By 31/12/2009 | • Provision of overnight facilities for wanderers market  
• Extends length of stay for markets that require more affordable accommodation  
• New entrants in the accommodation sector which will bring new business and employment opportunities  
• Accommodation facilities and market feedback monitored for visitor statistics and quality of product experience |
| 3.2 Creation of new eco-lodge resorts in appropriate areas but potentially close to the National Parks or on the boundaries, offering a rainforest theme with spa facilities and pitched at a 4-5 star level | By 2010-2012  | • Extension of existing accommodation type to provide more options for primary market segments and build return visitation and overnight stays in the Scenic Rim  
• OPW and other relevant agencies agree on lease terms for National Park land or appropriate site secured on periphery |
| 3.3 Provision for backpacker accommodation                                           | By 2010      | • Provision of new accommodation type to extend market segments and overnight stays in the Scenic Rim  
• Increases labour supply pool for agricultural industry |
| 3.4 Creation of farm stays                                                           | By 2011      | • Provision of new accommodation type to extend market segments and overnight stays in the Scenic Rim  
• Extends economic opportunities for agricultural businesses  
• Training in marketing and customer service to be provided |
| 3.5 Building more motels/chalet style accommodation (designs sympathetic to surrounding landscape) | By 2011      | • Provision of new accommodation type to extend market segments and overnight stays in the Scenic Rim  
• Extends economic opportunities for local businesses  
• Training in marketing and customer service to be provided |
| 3.6 Bed and Breakfast style accommodation                                            | By 2010      | • High quality style and service offerings will attract repeat visitation  
• Advantageous if heritage buildings can be utilised for this type of accommodation e.g. such as those in Kalbar |
| 3.7 Kooralbyn Conference Centre expansion and on-going upgrading of existing facilities, development of air strip for car club days (Kooralbyn Resort was in liquidation at time of print) | By 2015      | • Enhances the only conference facility in the Scenic Rim  
• Attracts a potential for meetings into the area  
• Enhances opportunities for marketing to car club members to undertake repeat visitation |
### Table 4: Retail-ancillary services

<table>
<thead>
<tr>
<th>Breakdown of actions</th>
<th>Timing</th>
<th>Performance measure or benefit</th>
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</table>
| 4.1 Development of market site(s) in locations to be agreed upon with emphasis on   | By 2009         |  ■ Appointment of Project Steering Group  
■ Identification of appropriate sites  
■ Creation of undercover area / or utilisation via modification of existing buildings for stalls and display and landscaping  
■ Additional product for the region to enhance visitation |
| farmers’ market and local produce sales                                              |                 |                                                                                                                                                               |
| 4.2 Encourage restaurants, cafes and rural attractions to be open seven days in all | By 2009         |  ■ Training to assist businesses better appreciate tourism industry  
■ Look to offer Barista coffee making or similar training programs  
■ Increased economic benefits to these businesses over time  
■ Improved visitor experience and potential to increase repeat visitation             |
| parts of Scenic Rim including Ipswich.                                               |                 |                                                                                                                                                               |
| 4.3 Training and up-skilling of retailers to enhance product offerings, especially    | By December 2008|  ■ Engage retail facilitation specialist to assess and develop training program  
■ Work one-on-one with retail operators to integrate tourism and retail  
■ Acknowledge need for more retail outlets to meet future demand                       |
| for food and beverage and general shopping in Ipswich and other parts of the Scenic  |                 |                                                                                                                                                               |
| Rim                                                                                  |                 |                                                                                                                                                               |
| 4.4 Restoration of heritage buildings in Kalbar and use as tourism opportunities e.g.| By 2010         |  ■ Ensures preservation of local built heritage  
■ Adds product to the tourism industry  
■ Economic benefits of employing local people for restoration works and provides on-going business and employment opportunities for the local residents  
■ Strengthen heritage trail and merchandise opportunities                             |
| retail, arts and crafts outlets, possible Visitor Information Centre, food markets,  |                 |                                                                                                                                                               |
| cafes etc.                                                                           |                 |                                                                                                                                                               |
| 4.5 Integrate wine trails into other tourism experiences                              | By 2010         |  ■ Build repeat visitation  
■ Increase product deliverables through collaborating with e.g. local restaurants and cafes, art and craft retail, accommodation providers etc. |
| 4.6 Farm Gate Food Sales, noting high quality produce grown in the region but lack   | By 2010         |  ■ Identify any restrictive legislation which may stop food sales taking place  
■ Determination of interest for agricultural businesses to sell from a farm-gate  
■ Facilitation of workshops to encourage farm-gate sales  
■ Creation of attractive signboard to show farm-gate locations and collateral (maps)  
■ Development of farm-gate map to encourage tours and broaden market interest       |
| of farm gate sale opportunities                                                       |                 |                                                                                                                                                               |
Table 5: Infrastructure

<table>
<thead>
<tr>
<th>Breakdown of actions</th>
<th>Timing</th>
<th>Performance measure or benefit</th>
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</table>
| 5.1 Creation of lay-bys on the Cunningham Highway, Mt Lindesay Highway, Route 90     | By 2009-2010 | - Enjoyment by visitors of rural and scenic rim vistas  
- Fewer traffic accidents  
- More pleasurable rural driving experience; more likely that visitors will tell others to undertake the driving route because it is easy to navigate |
| between Boonah and Beaudesert, Beaudesert and Tamborine, Tamborine and Canungra, and  |
| secondary roads through the seven National Parks                                       |              |                                                                                                                                                                                                                       |
| 5.2 Directional signage on highways and roads of the area and tourist trail signage   | By 2009      | - Easier (and therefore safer) driving conditions for visitors coming from North, South and East to the Scenic Rim (with distance markers)  
- Tourist trail that emphasises both the natural landscape and built tourism product |
| 5.3 Improve, through passing lanes/seal widening, roads in the Scenic Rim including  | Between 2009-2018 | - Adds to general road safety for residents and visitors  
- Encourages more drive tourism  
- Potentially reduces drive time to the area, thereby allowing more time (and spend) in the Scenic Rim itself  
- Increasing population growth in SEQ and growth in scenic drives possible |
| Ipswich to Boonah, Boonah to Beaudesert (circle route), Brisbane to Beaudesert,   |
| Brisbane to Mount Tamborine and Gold Coast into the Scenic Rim                        |              |                                                                                                                                                                                                                       |
| 5.4 Completion of heavy vehicle bypass for Beaudesert                                 | By 2009      | - Returns the town to its proper rural village charm  
- Encourages businesses to provide outdoor focus  
  e.g. Al fresco dining, due to limited truck movements  
- Visitors will linger longer in the town and spend more |
| 5.5 Improve streetscape in Boonah and Beaudesert and Canungra via colourful awnings,|
| park benches, wider footpaths, car parks out of city centres/high streets, tree     | By 30/06/2009 | - Part of public space responsibilities for new council  
- Location for new signs identified and agreed by Government  
- New signs erected indicating recreational / tourism activities and distances    |
| planting and improved signage for town amenities and activities                      |              |                                                                                                                                                                                                                       |
| 5.6 Complete circuit link road from Kooralbyn to Boonah                               | By 2011      | - Creates a new circle route for the Scenic Rim  
- Provides options for repeat visitation                                                                                                                      |
| 5.7 Public transport improvements, specifically rail between Brisbane and Ipswich    | 2010+        | - Currently a niche market of visitors who do not use a vehicle to travel to and around the Scenic Rim  
- For walking and cycling visitors there needs to be improvements to public transport for them to be able to enjoy the region |
| and mini buses between towns in the Scenic Rim                                       |              |                                                                                                                                                                                                                       |
| 5.8 Improved gateway into Ipswich                                                   | 2009         | - Improved directional signage from all the motorways around Ipswich to clarify exits into the city  
- Once off motorway, improved streetscape for visitors’ arrival into Ipswich  
- Better welcome for visitors will instil greater comfort and likelihood of longer stay and greater spend |
| 5.9 Boonah to Ipswich Regional Recreational Trail                                   | By 2010      | - Ensure construction is undertaken in a timely fashion  
- Begin marketing the new trail as part of the Scenic Rim product shortly before completion of the trail  
- Educate the tourism and business communities about the new facility  
- Likely to increase the numbers travelling to the Scenic Rim to experience the wilderness, especially those who are looking for an active visit (i.e. walkers, mountain bikers and horse riders) |
| 5.10 Creation of horse trail and mountain bike network around the Scenic Rim         | By 2012      | - Provide facilities for active visitor experiences  
- Diversity the potential of visitors who come to the Scenic Rim  
- Provides opportunities for hire businesses to be set up |
|                                                                                  |              |                                                                                                                                                                                                                       |
### Specific tourism opportunities associated with the world heritage listed national parks

All tourism development opportunities canvassed in Tables 1-5 could be progressed. The following opportunities are specifically linked to the ability for tourism groups and councils to encourage EPA and QPWS of the benefits (both economic and environmental) which could come from providing sympathetic, eco, appropriate developments within the Scenic Rim National Parks. Until it is known if QPWS are prepared to accept these opportunities which would match those of other park agencies in Australia and overseas, it is not possible to specify if the following suggested development opportunities will be viable.

<table>
<thead>
<tr>
<th>Breakdown of actions</th>
<th>Timing</th>
<th>Performance measure or benefit</th>
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</thead>
</table>
| 6.1 Development of a major mountain walk way through the Scenic Rim (something similar to The Overland Track in Tasmania or The Milford Track in New Zealand) | By 2011      | • Identification of the most appropriate walking route  
• Provision of series of tent camps along or adjacent to the walk  
• Commercial accommodation clustered at beginning and end of the walk to support and help pay for the public infrastructure within the National Parks  
• Strategically positioned open sided shelters along the route |
| 6.2 Climbers Centre at Mt French (rock climbing) | By 2009-2010 | • Seek agreement for an educational centre in the park with QPWS  
• Market concept of outdoor education to a new market group  
• Increase in leisure visitation and educational group visitation  
• Further emphasises Unique Selling Point of the Scenic Rim – mountains and spectacular scenery |
| 6.3 Creation of walks and picnic areas at Mt French and Lake Maroon | By 2011      | • New facilities for visitors who are casual walkers  
• Provision of mountain experience without the need for serious walking expertise  
• Collaboration between tourism industry and conservation industry and land managers |
| 6.4 Expansion of lookout at Kooralbyn with large viewing platform, interpretation boards and a covered picnic area | 2011         | • Improved product for visitors  
• Strategic central location looking at the Scenic Rim so offers quality vista for visitors who may have limited time or wish to orientate themselves prior to choosing a NP walk |
| 6.5 Improvements to the majority of the National Parks in the Scenic Rim through improved access points, interpretation boards, improved walking trails (including short walks for the less active and infirm and disabled), toilet facilities, equine facilities and picnic areas | 2009-2013    | • Analysis of NP areas which can have greater carrying capacity than others e.g. Limit numbers to the Lost World area by undertaking less infrastructure development and more development in parts of the NPs which can cope with higher visitation  
• Strengthens the area marketing of the National Parks and the activities people can undertake in them  
• Lengthens visitation time to the Scenic Rim |
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### Appendices

#### Appendix 3: Stakeholder consultation

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>William van Pragh</td>
<td>Developer</td>
<td>Abbey Apartments</td>
</tr>
<tr>
<td>Carol Richards</td>
<td>Manager</td>
<td>Abbey Museum of Art and Archaeology</td>
</tr>
<tr>
<td>Edith Cuffe</td>
<td>Chief Executive Officer</td>
<td>About the Garden</td>
</tr>
<tr>
<td>Con Searle</td>
<td>Managing Director</td>
<td>Action Realty Ipswich</td>
</tr>
<tr>
<td>Garth Llewelyn</td>
<td>Principal</td>
<td>Antrain</td>
</tr>
<tr>
<td>Martin Earp</td>
<td>General Manager</td>
<td>Alma Park Zoo</td>
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<tr>
<td>Dena Loveday</td>
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<td>Garry Connell</td>
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<td>Peter Roeife</td>
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<td>Anthony John Group</td>
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<td>Tony John</td>
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<tr>
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<td>Yvonne Davis</td>
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<td>Jason Harm</td>
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<td>Henri Paul</td>
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<td>Ross Blinko</td>
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<td>Graeme Daniel</td>
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<td>Peter Wilson</td>
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<tr>
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<td>Steve Moorehouse</td>
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<tr>
<td>Mark Jones</td>
<td>Principal Policy Officer Tourism Strategy Unit</td>
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<td>Birmita Kyruzmilner</td>
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<td>Brad McCarthy</td>
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<tr>
<td>Gary and Winnie Parker</td>
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<tr>
<td>John Woods</td>
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<td>Scott Aurich</td>
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<tr>
<td>Jason Cubit</td>
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<td>Janice Holstein</td>
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<tr>
<td>Alice Langford</td>
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<tr>
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<tr>
<td>David Pickering</td>
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<tr>
<td>Keith Hall</td>
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<tr>
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