



The Cape York Peninsula & Torres Strait Tourism Development

Action Plan 2008 – 2011

Foreword

The Cape York Peninsula and the Torres Strait are recognised as two of the most spectacular and culturally important tourism regions in Queensland and an important point of difference for the Queensland tourism industry.

To ensure this tourism potential is developed and promoted, the Queensland Government has invested in the development of a Cape York Peninsula and Torres Strait Tourism Development Action Plan.

Under the plan, the State Government will work with industry and local communities to identify and develop tourism opportunities that in turn will provide employment, training and career path opportunities.

A priority will be generating opportunities for locally-owned and managed businesses as well as partnerships with existing tourism operators, while at the same time protecting local culture, traditions and the environment.

A major focus of the plan is to increase the involvement of the local Indigenous people in all facets of tourism in Cape York Peninsula and the Torres Strait.

The Cape York Peninsula and Torres Strait Tourism Action Plan is an important initiative of the State Government's \$48 million, 10-year Queensland Tourism Strategy which focuses on the importance of Queensland's unique natural and cultural assets.

Through the development of this new action plan, we are ensuring Cape York Peninsula and Torres Strait tourism has a significant role and receives maximum benefit from the State's second largest export market, tourism.



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The Hon Desley Boyle MP

Minister for Tourism, Regional Development and Industry

| | |
|---|-----------|
| Part A An Overview | 5 |
| 1 INTRODUCTION | 5 |
| 1.1 Purpose | 5 |
| 1.2 Background | 7 |
| 1.3 Complementary Queensland Government and Private Initiatives | 7 |
| 1.4 The Consultation Process | 8 |
| 1.4.1 Cape York | 8 |
| 1.4.2 Torres Strait | 8 |
| 2 VISION | 9 |
| 2.1 Vision | 9 |
| 2.2 Tourism Development Principles | 9 |
| 2.3 Goals | 9 |
| 2.3.1 Economic goals: | 9 |
| 2.3.2 Social goals: | 9 |
| 2.3.3 Cultural goals: | 9 |
| 2.3.4 Environmental goals: | 9 |
| 3 TARGET MARKETS | 10 |
| 3.1 Cape York | 10 |
| 3.2 Torres Strait | 10 |
| 4 KEY STRATEGIC PRIORITIES | 11 |
| 5 STRATEGIES TO ACHIEVE THE VISION | 12 |
| 6 PRIORITY ACTIONS | 13 |
| 7 IMPLEMENTATION, FUNDING & REVIEW | 15 |
| 7.1 Implementation | 15 |
| 7.2 Funding | 15 |
| 7.3 Review | 15 |
| Part B Cape York Peninsula Tourism Development Action Plan | 16 |
| 1 INTRODUCTION | 17 |
| 2 CAPE YORK ACTION PLAN | 17 |
| Part C Torres Strait Tourism Development Action Plan | 29 |
| 1 INTRODUCTION | 29 |
| 2 TORRES STRAIT ACTION PLAN | 30 |
| Appendices | 39 |
| Appendix 1 Glossary of Terms | 39 |
| Appendix 2 Existing and Potential Markets Cape York | 39 |
| Appendix 3 Existing and Potential Markets Torres Strait | 42 |
| Appendix 4 Cape York – Attributes, Attractions and Challenges | 43 |
| Appendix 5 Cape York Peninsula Land Use Strategy | 46 |
| Appendix 6 Torres Strait – Attributes, Attractions and Challenges | 47 |
| Appendix 7 Funding | 48 |

The recommended actions and associated responsible agencies presented in this document do not imply that funding will be made available by the Queensland Government or any other agency or organisation for implementation. Implementation of any aspects of this Plan by the Queensland Government will need to be considered within the context of its overall funding priorities.

The following organisations made a significant contribution to the development of this Action Plan

| | |
|---|--|
| Aurukun Shire Council | Lockhart River Aboriginal Shire Council |
| Balkanu Cape York Development Corporation | Mabuiag Council |
| Bamaga Island Council | Mapoon Shire Council |
| Badu Council | Masig Council |
| Boigu Council | Mer Council |
| Cape York Peninsula Development Association | Muralug Council |
| Cook Shire Council | Napranum Shire Council |
| Department of Communities Cairns | New Mapoon Shire Council |
| Department of Tourism, Regional Development and Industry, Cairns | Ngurupai Council |
| Department of Tourism, Regional Development and Industry – Indigenous Business Development Unit | Pormpuraaw Aboriginal Shire Council |
| Dauan Council | Poruma Council |
| Douglas Shire Council | Queensland Parks and Wildlife Service |
| Erub Council | Regional Organisation of Councils of Cape York |
| Far North Queensland Area Consultative Committee | St Pauls Council |
| Great Barrier Reef Marine Park Authority | Saibai Council |
| Great Tropical Drive | Seisia Council |
| Hammond Council | Torres Shire Council |
| Hope Vale Aboriginal Shire Council | Torres Strait Regional Authority |
| Iama Council | Tourism Tropical North Queensland |
| Indigenous Coordination Centre Cairns | Ugar Council |
| Injinoo Shire Council | Umagico Aboriginal Shire Council |
| Kowanyama Shire Council | Warraber Council |
| Kubin Council | Weipa Town Council |
| | Wujal Wujal Aboriginal Shire Council |

We also acknowledge the contribution made to the preparation of the Action Plan by various Cape York Peninsula and Torres Strait tourism operators.

** For the purposes of this document, from here on in, Cape York Peninsula will be referred to as Cape York.*

PART A

An overview

1 Introduction

1.1 Purpose

The purpose of the Action Plan is to:

- Provide a strategic vision for the future of tourism in Cape York and the Torres Strait that incorporates the aspirations of Cape and Island communities and the commercial realities of the industry
- Establish key tourism priorities in Cape York and the Torres Strait such as infrastructure development, training/capacity building for communities and tourism operators, product development opportunities, visitor management demands, and market development
- Provide a clearly defined and coordinated action plan for the development of a sustainable tourism industry in Cape York and the Torres Strait

The Action Plan provides practical actions for government, industry, and community to work individually and in partnership so as to guide the strategic planning, development, management and marketing of sustainable tourism in Cape York and the Torres Strait. An “All of Government and Community” approach is required to effectively implement this Action Plan and this is reflected in the broad range of agencies, organisations and groups that are identified as having a role in implementing the Plan.

Tourism development throughout Cape York and the Torres Strait will undoubtedly be a positive move towards meeting the increasingly diverse demands of both domestic and international visitors, but it is not exclusively for the benefit of visitors or the tourism industry alone. It is also about providing commercial and non-commercial opportunities that will promote community and personal development and self-fulfilment.

This region represents a unique opportunity for tourism in Queensland, offering a range of nature-based and cultural tourism experiences while at the same time providing the opportunity for local communities to improve their self-sufficiency through active involvement in the tourism industry.

While tourism development in Cape York and the Torres Strait needs to reflect market demands and commercial realities, unlike a traditional industry driven approach, communities will play a pivotal role in shaping the nature and direction of tourism product development in the region.

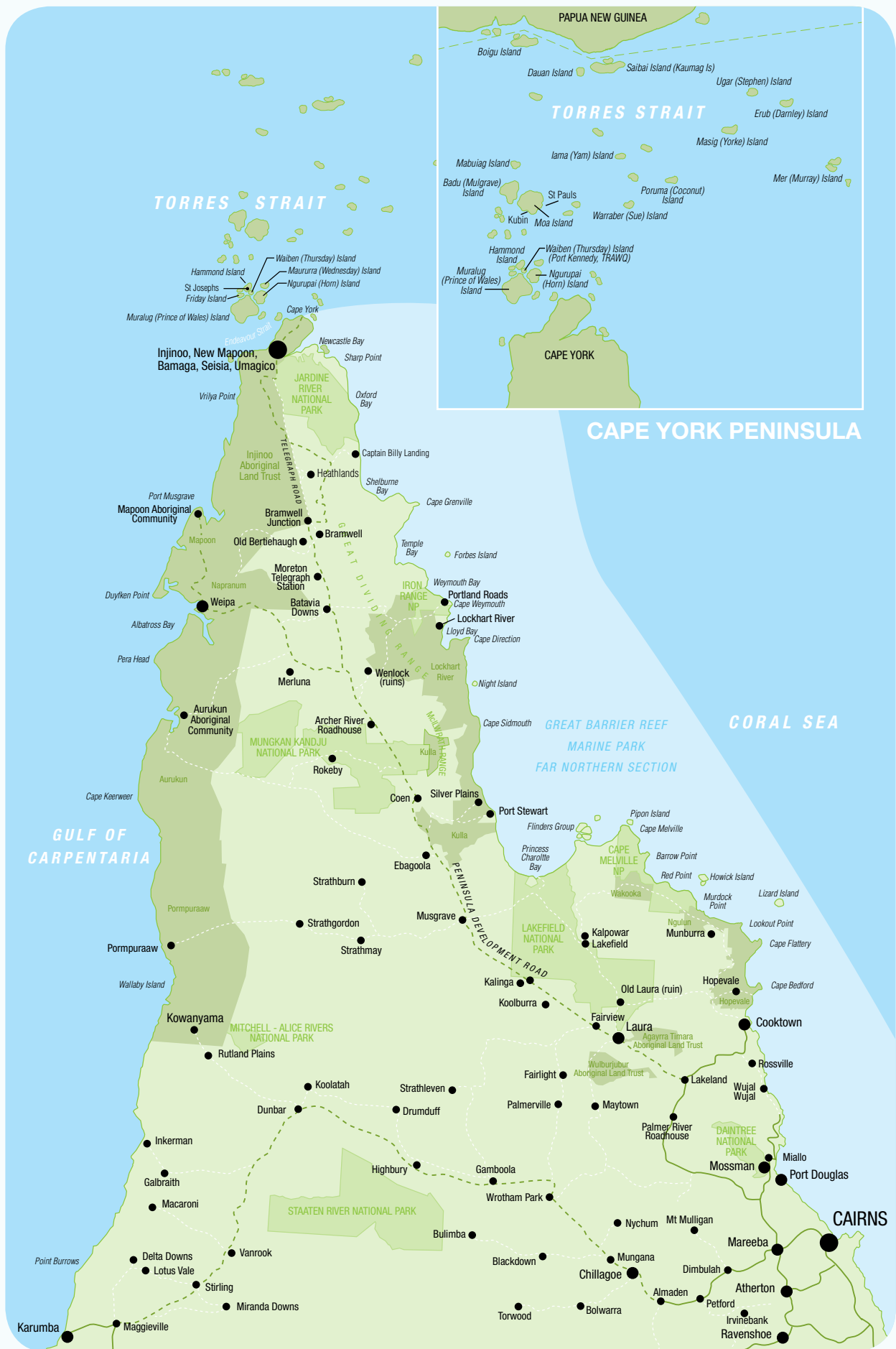
It is recognised that not all communities will want to be involved in tourism or necessarily have a tourism future. This Action Plan has been developed so as to support informed decision making by communities and individuals in those communities about their involvement in the tourism industry.

For those communities where there is a future for tourism, sustainable tourism development will contribute to the:

- Creation of employment, training, and career path opportunities, which in turn will assist in retaining young people in communities
- Creation of opportunities for the further development and cultivation of existing competencies and skills
- Generation of opportunities for locally owned and managed businesses
- Generation of export earnings
- Attraction of investment equity
- Growth in demand for the provision of public and private infrastructure development to support tourism

Linked to these economic, business and employment opportunities are a range of potential social and environmental benefits including:

- Ensuring the enduring integrity of Cape York and Torres Strait culture, traditions and history is preserved and protected
- Promotion of a greater awareness and appreciation and respect for Cape York and Torres Strait people and their cultures, histories, traditions, and environments
- Enhanced capacities in enabling preservation and sustainable management of land and sea ecosystems within Cape York and the Torres Strait
- Celebration of pride in Indigenous Cape York and Torres Strait culture and traditions particularly amongst the younger generations
- Greater community and individual motivations and aspirations to succeed
- Enhanced focus on education, training and career development
- Improved levels of self-esteem and affluence within the communities
- Reduction in social and health problems.



1.2 Background

The Cape York Peninsula and Torres Strait Tourism Development Action Plan is an initiative of the Queensland Government, working in partnership with government, industry and the community. The Action Plan has been developed under the guidance of Tourism Queensland and was funded by the Queensland Government as part of a broader Cape York Tourism Development Package. The Torres Strait section of the Action Plan was jointly funded by the Queensland Government, the Torres Strait Regional Authority (TSRA) and the Australian Government through the Great Tropical Drive project.

The Action Plan covers the Cape York Peninsula, bounded in the south by the Cook Shire boundary, the communities of Wujal Wujal on the east coast and Kowanyama on the west coast and the Mitchell and Nassau Rivers, and the islands and mainland island communities of the Torres Strait.

This remote part of Australia contains a wealth of natural areas that are of increasing attraction to the domestic and international tourism markets. It is home to a largely Indigenous population of Aboriginal and Torres Strait Islander people, a small population of non-Indigenous people, and a range of established and developing tourism businesses. In general these communities desire tourism development and see it as becoming an important part of their economy. However, tourism needs to be economically, ecologically, socially and culturally sustainable and therefore needs to respect the physical, social and cultural environment of Cape York and the Torres Strait while providing sustainable economic activity.

Tourism development in Cape York and the Torres Strait has the potential to assist in satisfying the growing demand of domestic and international tourists for authentic nature-based and Indigenous cultural experiences.

The Action Plan recognises that while in many ways Cape York and the Torres Strait are similar, they are different in several key areas. Similarities that will strongly influence the nature of tourism development are:

- Both regions are very remote with a small but substantial Indigenous population
- Communications can be difficult and seasonal influences are significant
- There is a desire for the sustainable use of the natural environment
- There is a desire for the protection of Indigenous cultural values and lifestyles
- There is a desire for local involvement in the tourism industry and to develop tourism services and products that will benefit regional economic development
- There is an existing long standing tourism industry in the regions that provides a good basis for new tourism product development
- Training is needed to develop a skilled workforce across all aspects of tourism with external specialist

management expertise needed to effectively guide tourism development

- Tourism developments should be small, low-key and be based on natural and/or cultural values
- Management of the impact of tourism is seen as a high priority that requires investment in infrastructure and human resources
- Partnerships with experienced operators are seen as desirable so long as they are effectively negotiated and managed
- Government has a key role to play in providing infrastructure and managing tenure and land access
- Communities will play a key role in establishing the direction and nature of tourism in their area in partnership with industry where appropriate.

The key differences are:

- The geography of the two areas will significantly influence the nature and style of tourism development and potential markets
- The Torres Strait is an archipelago of islands with few substantial land masses whereas Cape York occupies a huge area of land with small centres of population separated by large distances
- Cape York is accessible to the travelling 4WD market, while the Torres Strait depends largely on air access and to a lesser extent sea transport
- The Torres Strait has a strong Commonwealth Government presence via the Torres Strait Regional Authority (TSRA) which provides many of the functions of regional Government in addition to local government, whereas governance of Cape York is more diverse involving all levels of local, state and federal government, plus stronger input from the private sector

1.3 Complementary Queensland Government and Private Initiatives

Queensland Tourism Strategy (QTS)

The QTS lays the foundation for the coordinated and sustainable development of tourism in Queensland and gives industry and government the vision, goals, targets and actions to meet the challenges and opportunities facing the industry over the next 10 years. The issues identified in this Action Plan incorporate all of the themes of the QTS:

- Coordination, partnership and community engagement
- Investment, infrastructure and access
- Workforce development
- Developing and marketing a Queensland style visitor experience
- Natural environment and culture
- Future insights and research

Indigenous Tourism

The 2004 Tourism Queensland Indigenous Tourism Strategy (TQITS) notes that the maximum benefit for Indigenous people will not result from an exclusive interest in the cultural tourism sector, but from greater involvement at all levels in the mainstream tourism industry. The TQITS has informed the development of this plan and the Queensland Indigenous People in Tourism Strategy currently in development will reference the Cape York and Torres Strait Tourism Development Action Plan.

Cape York Peninsula Land Use Strategy (CYPLUS)

CYPLUS was developed in 1992 and included a range of strategies to guide the economic development on Cape York. Strategy 11 dealt specifically with tourism on the Cape and has been used as the underlying basis of this plan. Further information on CYPLUS can be found in Appendix 5.

CYPLUS is currently being reviewed; specifically economic and infrastructure strategies to identify constraints to development and possible actions. The Cape York and Torres Strait Tourism Development Action Plan is consistent with the directions envisaged in the CYPLUS review.

Art and Cultural Tourism Strategy

This strategy is a joint effort between Arts Queensland and Tourism Queensland which highlights the importance of Indigenous Art and Culture in the Queensland's tourism mix.

Other

Importantly, the Plan is also aligned with a number of key whole-of-government planning frameworks including:

- The Smart State Strategy
- Community Engagement Improvement Strategy
- Partnerships Queensland
- Cape York Partnerships Economic Development Policy Strategy
- Cape York Employment and Training Strategy
- Indigenous Business Capacity Building Program
- Indigenous Business Establishment Program
- *Cape York Peninsula Heritage Act 2007*
- Blueprint for the Bush
- Queensland Skills Plan

From Hand Out to Hand Up – Cape York Institute

The Cape York Peninsula and Torres Strait Tourism Development Action Plan through delivering better prospects, more real jobs and greater enterprise opportunities, will impact positively on social and economic development in Indigenous communities. This is consistent with the objectives of the Cape York Institute's Cape York Welfare Reform Project "From Hand Out to Hand Up".

1.4 The Consultation Process

1.4.1 Cape York

A review of the extensive range of previous surveys, studies and reports on Cape York was followed by consultations with communities, the tourism industry, key state agencies and other key stakeholders at formal and informal meetings across the Cape including in Cairns, Cooktown, Bamaga, Weipa, Mapoon and Aurukun. These meetings and consultations included discussions regarding:

- Current levels of tourism
- Existing and desired tourism infrastructure
- Community attitudes and aspirations towards tourism
- Potential attractions for visitors
- Skills that may be available or required within the community
- Land, tenure and native title issues
- Impediments to future tourism industry development

1.4.2 Torres Strait

The process commenced with broad community consultation in order to first understand their attitudes towards tourism development and to gauge the level of understanding of what tourism means and its implications for day-to-day community life.

Visits to, and/or consultations with representatives of all of the communities within the Torres Strait enabled an initial understanding of:

- The core values of each community
- Current levels of tourism
- Existing tourism infrastructure
- Other community infrastructure and needs which might be relevant to tourism development
- An understanding of the extent to which the community understands tourism
- Current community attitudes towards the development of tourism
- The appeal of each community and the potential attractions for visitors
- The skills and competencies that might be available within the community to participate within any tourism developments
- Land, tenure and native title issues that might exist within the community
- Community attitudes to working in partnerships with private investors.

Further details and analysis of the surveys, studies and reports reviewed during this study and reports on the consultations undertaken are available from Tourism Queensland in the form of a CD ROM.

PART A

An overview

2 Vision



2.1 Vision

Long term sustainable development of tourism on Cape York and the Torres Strait that respects and celebrates the culture, traditions and lifestyle of the Indigenous and non-Indigenous people, enhances environmental integrity and creates economic and social growth

2.2 Tourism Development Principles

The character of tourism development must be compatible with the following core community values:

- Involvement of Cape York and Torres Strait residents and communities in decision-making processes
- Respect for Cape York and Torres Strait people and their culture, histories, traditions and environments
- Enhance the understanding and appreciation of Indigenous people, and their culture, heritage and traditions
- Minimal impact on the environment, and implementation of sustainable environmental management practices
- Low social impact tourism that is in keeping with the 'character' of the regions and the aspirations of its residents
- Sustainable business activity levels that reflect clearly identified visitor demand and community values
- Creation of jobs and opportunities for personal advancement and fulfilment

2.3 Goals

The following goals have been identified as the focus of developing a sustainable tourism industry in Cape York and the Torres Strait:

2.3.1 Economic goals:

- Generate sustainable businesses, employment and a viable economy in regional areas
- Attract public and private investment in tourism
- Greater tourist and community infrastructure development

2.3.2 Social goals:

- Develop greater competencies and skills within communities
- Create employment and career paths which will help to keep young people in the region
- Establish businesses opportunities for residents to develop and achieve personal financial independence

2.3.3 Cultural goals:

- Ensuring that the integrity of Cape York and Torres Strait culture, traditions and history are preserved and protected
- Celebrate pride in traditional Cape York and Torres Strait culture and traditions (particularly amongst today's younger and future generations)
- Promote awareness, appreciation and respect for all peoples of Cape York and Torres Strait, their culture, history, traditions, and environment

2.3.4 Environmental goals:

- Preserve and sustainably manage land and sea ecosystems within Cape York and Torres Strait
- Minimise the environmental impacts of tourism
- Adopt environmentally sustainable and sensitive tourism infrastructure and design standards

PART A

An overview

3 Target Markets

3.1 Cape York

Visitation to Cape York is dominated by mature Australians, German-speaking Europeans, British, North Americans and New Zealanders travelling as part of a group or in hire vehicles.

Through improved infrastructure and destination promotion the opportunity to open new markets and increase current smaller markets such as fly-in fishing, cruising and specific themed touring will increase.

Improvements to road access will open the Cape to a wider touring market and present communities off the main track the opportunity to cater to the more adventurous 4WD traveller.

The main activities visitors are seeking while in Cape York are:

- 4WD
- Camping
- Exploring
- Fishing
- Swimming
- Relaxing
- Sightseeing

Niche Markets are small yet significant and include:

- Fly in/fly out fishing
- Fly in/fly out sightseers
- Self drive international camping
- Backpackers
- Bird watching – Iron Range and Lockerbie Scrub
- Hunting – pigs. Rifle and bow-hunters

Potential market segments include:

- Bird watching
- Diving
- Cruise shipping
- Super Yacht cruising
- Family members “War memories” tours

** For more detailed information refer to Appendix 2 – *Existing and Potential Markets Cape York*.

3.2 Torres Strait

The target market for the Torres Strait is the adventurous traveller who is prepared to travel to new regions to seek out unique experiences.

Potential new traveller markets to the region include:

- Fishing
- Luxury (e.g. Poruma Island Resort)
- Bird Watching
- Diving
- Cruise Shipping
- Super Yacht cruising
- Family member “War memories” tours – repeat US Market

** For more detailed information refer to Appendix 3 – *Existing and Potential Markets Torres Strait*.



The Northern Tip, Cape York

PART A

An overview

4 Key Strategic Priorities

The success of tourism in Cape York and the Torres Strait lies in the ability to recognise identified tourism opportunities and challenges (refer to Appendices 4 and 5) and to address them as the key strategic priorities in moving forward. The following strategic priorities are common to both Cape York and the Torres Strait and provide the basis on which the respective parts of the Action Plan (Parts B & C) have been developed.

Common priorities for both areas include:

- Enhanced public infrastructure to support tourism visitation
- Increased market awareness and understanding of the region
- Improved product development including tourism activities, accommodation and attractions across the region
- Improved knowledge of tourism and its implications for community life, cultural heritage and traditions within some communities
- Improved tourism support infrastructure, facilities and tourism shopping opportunities
- Effective cooperation between tourism stakeholders
- Credible research data, collection and monitoring
- Improved accessibility for visitors
- Improved skills and capabilities including customer service training
- Effective management of visitor environmental and social impacts
- Consistent and established destination image

Additional priorities for Torres Strait include:

- Enhance the appeal of Torres Strait as a visitor destination
- Appropriate use of limited freehold land to the benefit of tourism
- Greater spread of tourism product across the various communities within the region
- Improve destination marketing
- Greater use of available funding sources



Thursday Island, Torres Strait

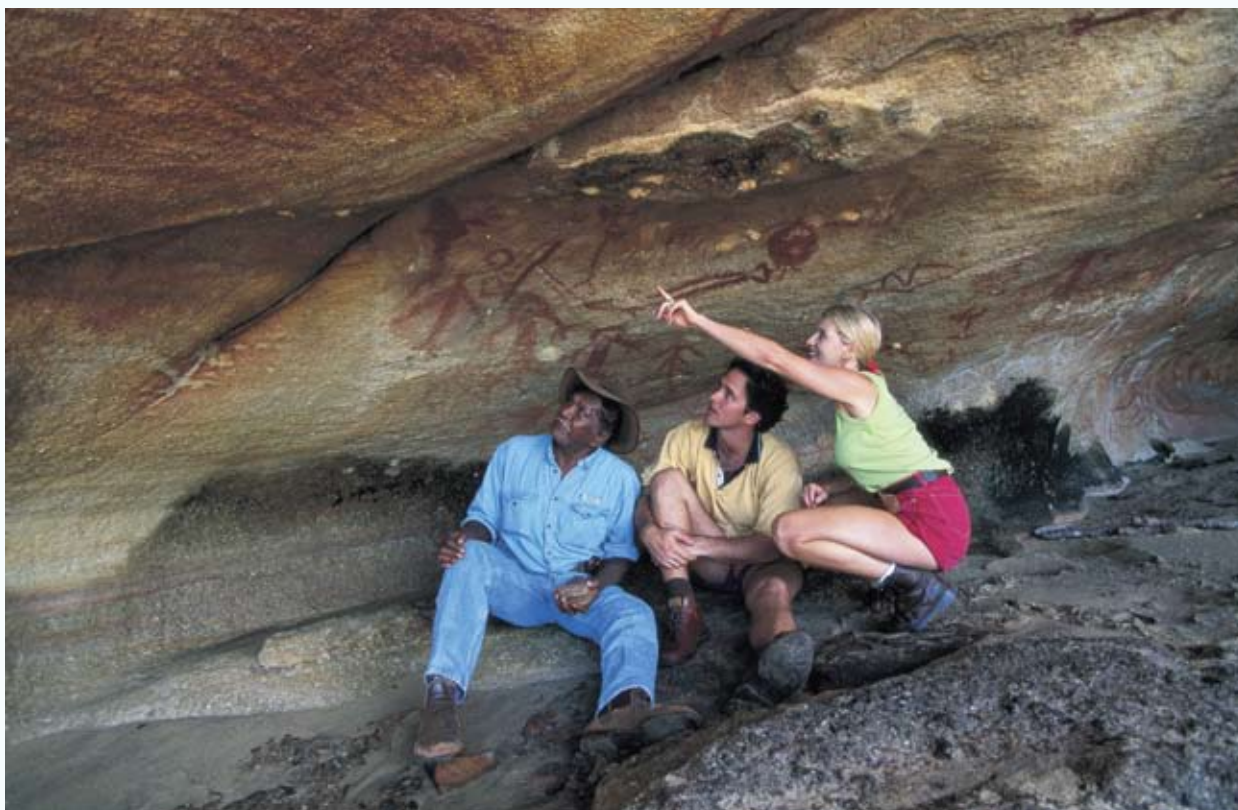
PART A

An overview

5 Strategies to Achieve the Vision

This Action Plan identifies key actions for both Cape York Peninsula and the Torres Strait which are grouped under the following strategies:

- Strategy 1** – Formalise leadership & coordination of tourism in the regions
- Strategy 2** – Improve community & industry tourism planning and knowledge
- Strategy 3** – Develop tourism products, experiences & supporting services
- Strategy 4** – Define and develop the destination marketing & promotional messages of Cape York/Torres Strait
- Strategy 5** – Develop and maintain tourism resources & infrastructure
- Strategy 6** – Improve workforce skills and capacity
- Strategy 7** – Attract the financial resources required to develop, maintain and upgrade tourism infrastructure and product, including identifying funding grants at Commonwealth, State and Local Government levels
- Strategy 8** – Effective dissemination of visitor information and utilisation of the existing distribution channels.
- Strategy 9** – Establish ongoing Cape York/Torres Strait specific tourism research programs



Aboriginal Cave Paintings, Cape York

PART A

An overview

6 Priority Actions

All recommended actions in the Plan are considered important to the long term sustainable development of tourism in the two areas and should be viewed as a package of linked and coordinated initiatives. However, several key actions are considered to be 'catalytic' in that they would provide the basis and impetus for the successful implementation of all actions.

#1 Priority Action for Cape York & Torres Strait

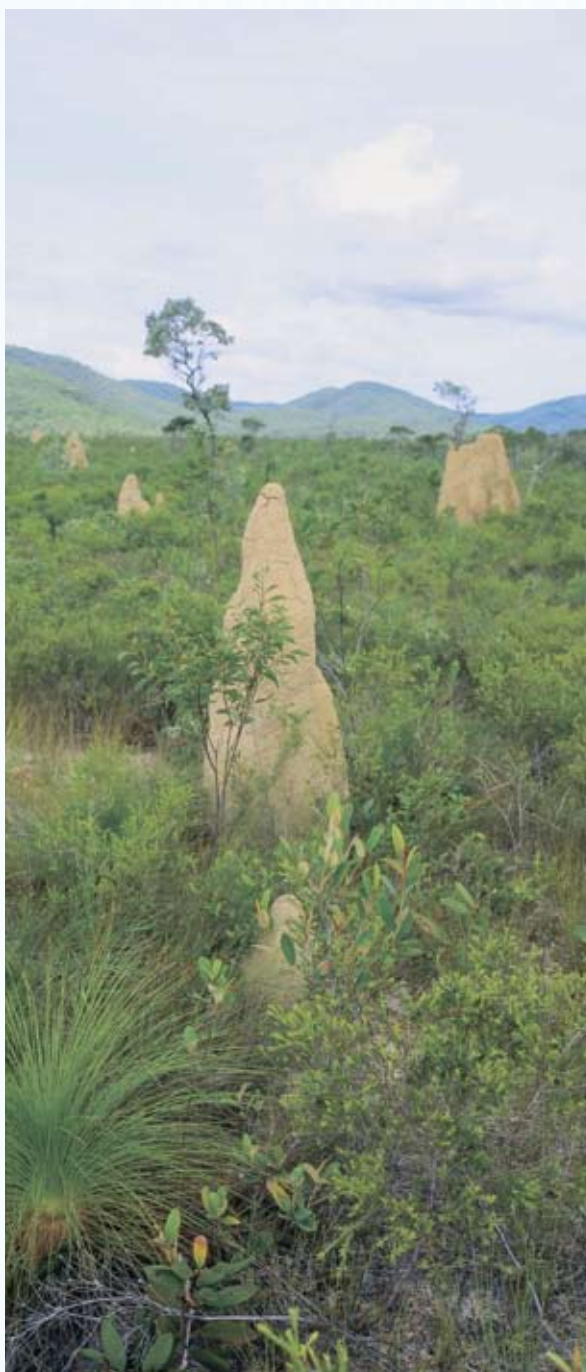
The priority one action for both the Cape York and Torres Strait to be completed by April 2008:

"Appoint fulltime Tourism Development Officers for Cape York and the Torres Strait and establish a Cape York Reference Group and Torres Strait Local Tourism Organisation."

These two positions would be responsible for overseeing the implementation of the Plans and together with the establishment of a Reference Group and Local Tourism Organisation ensure coordinated tourism planning, development and marketing activities in Cape York and the Torres Strait.

Other Priority Actions for Cape York & Torres Strait

The following priority actions for Cape York and Torres Strait will be progressively implemented and completed by December 2011. The nominated completion date is indicative only, and given the nature of many of these actions and their ability to be implemented through established programs, they can be implemented in a shorter timeframe. However, some actions require further consultation and more detailed planning and as a result will necessitate a longer implementation timeframe.



Termite Mounds, Iron Range National Park, Cape York Peninsula

| Cape York | Torres Strait |
|---|--|
| <ul style="list-style-type: none"> Establish a local tourism reference group to facilitate regular communications on sub-regional tourism planning, development and marketing issues subject to community demand and availability on a quarterly basis (Action 2) | <ul style="list-style-type: none"> Establish a Torres Strait local tourism champion's program within Torres Strait towns/communities to promote communication and coordination between communities and provide support, mentoring and training for these local champions (Action 2) |
| <ul style="list-style-type: none"> Establish a local tourism champions program within Cape York towns/ communities to promote communication and coordination between the sub-regions and provide support, mentoring and training for these local champions (Action 3) | <ul style="list-style-type: none"> Conduct a tourism awareness and action identification program for those Torres Strait communities (both island and NPA) or cluster of communities that choose to engage in tourism (Action 3) |
| <ul style="list-style-type: none"> Conduct a tourism awareness and action identification program for Cape York communities (Action 4) | <ul style="list-style-type: none"> Develop an effective means of linking existing and new tourism assets and experiences together to enable greater marketability through cooperative efforts (Action 9) |
| <ul style="list-style-type: none"> Establish and implement a bush camping sites development program for Cape York on all land tenure types. Identify 3 priority camping site locations by the end of June 2008 and develop a map detailing all the camping sites by the end of December 2008 (Action 6) | <ul style="list-style-type: none"> Develop the Torres Strait brand within the context of the regional TNQ brand that engages existing and potential target markets and clearly illustrates to potential visitors the "personality" of the Torres Strait and its appeal as a unique and attractive travel alternative (Action 12) |
| <ul style="list-style-type: none"> Identify and develop new and redevelop existing visitor and tourism opportunities and facilities in: <ul style="list-style-type: none"> Great Barrier Reef Cape York national parks, with particular focus on day use, camping and walking facilities in the Lakefield, Iron Range, Jardine River and Mungkan-Kannju National Parks. To be completed by end of 2008 (Action 7) | <ul style="list-style-type: none"> Coordinate a Cape York and Torres Strait Tourism Development Action Plan training fund to support the capacity building of operators (Action 25) |
| <ul style="list-style-type: none"> Develop a Cape York brand within the context of the regional TNQ brand that engages existing and potential target markets and clearly illustrates to potential visitors the "personality" of the Cape and its appeal as a unique and attractive travel alternative (Action 14) | |
| <ul style="list-style-type: none"> Coordinate a Cape York and Torres Strait Tourism Development Action Plan training fund to support the capacity building of operators (Action 27) | |

Detailed implementation strategies for the above recommended priority actions will be developed by the Tourism Development Officers in partnership with the nominated lead agencies and other key agency, industry and community stakeholders.

Plan Timeframe

The timeframe for the implementation of the Cape York Peninsula and Torres Strait Tourism Development Action Plan has been broken into three stages.

Stage 1 – Implement the Number 1 Priority Action by April 2008– refers to Action 1 for both Cape York and Torres Strait.

Stage 2 – Progressively implement and complete the above Priority Actions of the Cape York Action Plan, and the Torres Strait Action Plan by December 2011.

Stage 3 – The timeframe for the implementation of the remaining Actions of both plans are to be developed by the lead agencies through a process of stakeholder consultation. It is possible that some of these Actions will be implemented as a flow-on from the implementation of the Stage 1 and 2 Actions (from 2011).

If opportunities arise to undertake any of the actions earlier and stakeholders are in agreement, the time frames can be brought forward.

PART A

An overview

7 Implementation, Funding and Review

7.1 Implementation

Tourism Queensland will oversee the implementation of the Action Plan. However, in recognition of the critical roles played by Tourism Tropical North Queensland (TTNQ) and the Torres Strait Regional Authority (TSRA) in tourism development in these regions, TTNQ will adopt joint lead agency status with TQ for the implementation of the Cape York section and the TSRA will take lead agency status for the implementation of the Torres Strait section. The fulltime Tourism Development Officer positions for Cape York and the Torres Strait will be responsible for the day-to-day implementation of the Plan.

In addition to the role of the lead agencies, the involvement of a number of other agencies and organisations¹ will be critical to the successful implementation of the Action Plan. They are identified alongside each action as relevant.

7.2. Funding

Funding the plan's implementation will be sourced through a variety of means dependant on the actions being undertaken.

Where additional funding is required to progress other actions, it will be the responsibility of the Tourism Development Officers to secure funding from various Government and private sources (See Appendix 7 for a full listing).

7.3 Review

This is a dynamic Action Plan with the flexibility for changes at any stage during its lifespan. However, it will be formally reviewed in three years or before if changes in the market or destination deem it necessary.

¹ Department of Tourism, Regional Development and Industry (Cairns Regional Centre and Indigenous Business Development in Brisbane), Queensland Parks and Wildlife, Department of Communities; Department of Education, Training and the Arts, Indigenous Coordination Centre (Cairns); Regional Organisation of Councils Cape York, Local Government authorities, Cape York Peninsula Development Association, Balkanu Cape York Development Corporation; Department of Education, Employment and Workplace Relations.



Silicon sands, Cape Flattery, Cape York Peninsula

PART B

Cape York Peninsula Tourism Development Action Plan

1 Introduction

This Action Plan has been developed to capitalise on Cape York's tourism attributes and attractions while at the same time addressing the challenges that tourism faces in the region (refer to Appendix 4).

The recommended actions support the development of a sustainable tourism industry in a young tourism destination. They recognise the underlying 'demand led' nature of the tourism industry and how Cape York is best able to 'supply' that demand with tourism products and services.



Beach at Lockhart River, Cape York Peninsula

PART B

Cape York Peninsula Tourism Development Action Plan

2 Cape York Peninsula Action Plan

Strategy 1

Formalise the framework for leadership & coordination of tourism in the region

Cape York has been subject to an extensive amount of economic and development planning, including the Cape York Peninsula Land Use Strategy (CYPLUS²), Cape York Partnerships (Indigenous) Economic Development Policy Framework and the Cape York Land Tenure and Management programs, and the *Cape York Peninsula Heritage Act 2007*. However, there is no tourism framework and limited resources to coordinate and implement the reports and their recommendations.

Sustainable and successful tourism development requires committed engagement from both community and government, including:

- The region's tourism stakeholders working together, pooling their resources and energies to promote the region, deal with industry-related issues and seek additional funding
- A Cape York Reference Group working with Tourism Tropical North Queensland (Regional Tourism Organisation) and Tourism Queensland (State Tourism Organisation)
- Extending the focus beyond promotion to developing tourism experiences, infrastructure, and support services within the region
- Need for tourism 'champions' in the community who not only know and advocate the tourism aspirations of their community, but understand that successful tourism development relies on regional coordination and cooperation and the establishment of strong regional tourism partnerships. Such tourism champions play a vital role in regionally dispersed communities where there is a strong sense of local community and progress is best achieved through regionally coordinated action

The following actions address the need for Cape York to develop its tourism leadership capacity and capabilities so as to take ownership of its tourism future.

² For further information on CYPLUS refer to Appendix 5

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|--|--------------------|
| 1. Appoint a full time Cape York Tourism Development Officer in TNQ region to implement this Action Plan (Priority 1) | TQ TTNQ DTRDI ICC DOC EPA/QPW DNRW ROCCY CYPDA Cook Shire Council Weipa Town Council Balkanu | By April 2008 |
| 2. Establish a local tourism reference group to facilitate regular communications on sub-regional tourism planning, development and marketing issues subject to community demand and availability on a quarterly basis in: <ul style="list-style-type: none"> • Cooktown/Laura/Hopevale/Rossville/Ayton/Wujal Wujal/Hann River • Kowanyama/Pormpuraaw/Musgrave • Weipa/Aurukun/Mapoon/Napranum • Coen/Lockhart River/Moreton/Bramwell • Northern Peninsula Area | TQ TTNQ DTRDI EPA & QPW TAFE DOC Balkanu ICC DNRW ROCCY CYPDA TSRA DRET QTIC | By December 2011 |
| 3. Establish a local tourism champions program within Cape York towns/communities to promote communication and coordination between the sub-regions and provide support, mentoring and training for these local champions | TQ (TDO) TTNQ | By December 2011 |



Fruit Bat Falls, Jardine River National Park, Cape York

Strategy 2

Improve community & industry tourism planning and knowledge

Communities across Cape York are at different stages of understanding the tourism industry and the local implications. Many residents have limited exposure to what it is like to be a tourist, and many 'businesses' are run for their community benefits rather than as private enterprise. It is ideal that each community understand the benefits and the implications of tourism, and that they embrace and support continuing development of the industry.

Tourism does not offer any short-term fixes but may offer some longer term opportunities for all Cape York communities. Ideally, development of tourism operations and associated support businesses will provide community residents with opportunities to develop skills, build career paths, and move towards personal fulfilment and increased financial independence.

In the short to medium term government and communities must recognise that tourism on Cape York will continue to be seasonal and in the early stages of business development may not provide enough income to sustain individuals for the whole year. As a result, tourism businesses may require some levels of income or business development support during start-up.

The following actions are targeted at ensuring wide spread community understanding of tourism and its implications, effective determination of community tourism aspirations, informed decision making and the formulation of specific tourism development actions for each community.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|---|--------------------|
| <p>4. Conduct a tourism awareness and action identification program for Cape York communities, comprising:</p> <ul style="list-style-type: none"> the importance of tourism, its character and its implications community tourism aspirations tourism appeal and opportunities community review of existing product and experiences infrastructure needs visitor management strategies support for exploratory fact finding missions to other emerging destinations/Indigenous communities where tourism has been successfully developed | <p>TQ (TDO) TTNQ Local Government TQ Tourism operators</p> | By December 2011 |
| <p>5. Coordinate an audit of existing agency business development programs to ensure they appropriately cater for tourism needs</p> | <p>DTRDI ICC DOC DEEWR IBA TTNQ TQ QTIC Balkanu Local Government</p> | By December 2011 |

Strategy 3

Develop tourism products, experiences & supporting services

Tourism is a 'people industry' involving the development and supply of a range of facilities, services and experiences to meet the needs, interests, aspirations and expectations of visitors.

The visitor experience continues from the moment of discovery, to arrival and until the moment of departure. A tourist destination must therefore be capable of meeting all the needs tourists might have prior to and during their visit.

Tourism product comprises the distinct and unique cultural and natural assets and attractions of the region together with support facilities such as accommodation, dining, entertainment and transport products.

The Cape York tourism experience must reflect core community values and the key attributes of the destination. Such an approach will not only ensure the protection of existing community values and thus elicit wide spread community ownership of the tourism experience, but also provide Cape York with a unique tourism offering which will be attractive to a growing market looking for new experiences, environments and cultures.

One of the most appealing attributes of Cape York as a destination is that of true wilderness. Consequently, there is not the same level of visitor demand for support facilities that are usually expected in alternative leisure destinations. Amenities are not expected to be of a luxury standard; clean, comfortable and value for money options are preferred. Whilst most visitors consider that camping adds to the experience, many also agree that a night or two of "simple luxuries" (warm shower, bed, cooked meal) are expected.

The provision of more accommodation options and including a dining option will encourage visitors to spend more money at each destination. Taking advantage of fresh local produce (e.g. seafood) is recommended. In any development, the cost to the visitor should be kept relatively low (otherwise the inexpensive camping option will be chosen).

Development of accommodation options should be monitored to ensure they do not negatively impact on the natural environment.

Mass tourism is not a feasible option for the Cape York Peninsula.



Touring Through Cape York

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|---|--|
| 6. Establish and implement a bush camping sites development program for Cape York on all land tenure types. Identify 3 priority camping site locations by end of June 2008 and develop a map detailing all the camping sites by the end of December 2008 | TQ TQ (TDO) EPA/QPW DNRW TTNQ ROCCY CYPDA Traditional Owners Local Government Private land owners | Three sites identified by June 2008 Develop map of all camping sites by December 2008 |
| 7. Identify and develop new and redevelop existing visitor and tourism opportunities and facilities in: <ul style="list-style-type: none"> Great Barrier Reef Marine Park Cape York national parks, with a particular focus on day use, camping, and walking facilities in the Lakefield, Iron Range, Jardine River and Mungkan-Kaanju National Parks | EPA/QPW GBRMPA TQ (TDO) TQ TTNQ CYPDA ROCCY Industry Traditional Owners | By December 2011 |
| 8. Deliver the Aussie Host training program in participating Cape York communities | QTIC TTNQ TQ (TDO) TQ DETA | From 2011 |
| 9. Identify business development needs of existing and potential operators, including those seeking arts and craft development and training support, and direct them to appropriate agencies and organisations for support | TQ (TDO) ICC Arts Qld TTNQ TQ DCITA DTRDI CYPDA Balkanu | From 2011 |
| 10. Develop and market a drive tourism route for Cape York | TTNQ DMR TQ TQ (TDO) | From 2011 |
| 11. Develop a Cape York events calendar, strategy and promotional campaign that encourages visitation to the Cape all year round | CYPDA TTNQ ROCCY Local Government | From 2011 |
| 12. Work with operators and develop a range of land/sea/air packages and self drive itineraries | TTNQ Industry | From 2011 |
| 13. Develop and deliver product distribution training | TTNQ Industry | From 2011 |

Strategy 4

Define and develop the destination marketing & promotional messages of Cape York

Cape York generally has a low tourism profile with limited market awareness about opportunities other than 4WD adventure trips. Marketing activities need to build awareness among national and international audiences, of the region as a whole, and its niche tourism options such as cultural tours, bird-watching and fishing.

TTNQ and TQ hold the primary role of marketing Cape York as a tourism region both within Australia and overseas. Individual operators generally promote themselves on a smaller scale (due to the costs involved) such as supporting caravan and camping shows in major metropolitan cities and Cape York Expos in Cairns. TTNQ is currently targeting the self-drive market through media familiarisations, a Cape York Information Guide and the caravan and camping shows. TQ includes Cape York as part of its national and international advertising campaigns.

“Branding” is a marketing term that refers to the feelings, images and emotions perceived by customers about a particular product or destination. The hallmark of a good brand is that it builds the trust of its customers, and it delivers on its promises. Research shows that people who have not been to the Cape had images of rivers, creeks, waterholes, rainforest and wildlife, especially crocodiles. Those who had been to the Cape had images of bulldust, large distances and road corrugations. Similarly concepts of wilderness are tempered by the reality of roadside litter, and community social issues.

TTNQ and TQ have undertaken a brand refresh for the Tropical North Queensland destination, the messages of which will encompass the Cape York, Torres Strait and Gulf Savannah regions. There is potential for the Cape York Peninsula to develop a strong sub-brand within the Tropical North Queensland parent brand starting with its key advantages and delivering the reality of the Cape York experience. Key components of a Cape York sub-brand would include:

- Challenge and adventure
- Isolation and remoteness
- A timeless and changing landscape
- A unique experience – the trip to the tip of Australia
- Getting away from it all
- A special fishing experience
- A unique cultural experience
- Cape York characters
- Engagement with traditional owners and Indigenous residents and nature on its terms

Promotional and marketing activities will be focused on:

- Growing existing markets, extending length of stay, encouraging repeat visitation, promoting greater dispersal throughout Cape York, create a stronger ‘shoulder’ season by extending the tourist season into the wet/ tropical season and engendering strong word of mouth referral recommendation
- Attracting high yield markets/segments relative to the destination
- Capturing markets that are presently visiting the broader Tropical North Queensland region
- Leveraging tourism networks through Tourism Queensland
- Positioning and promoting new and existing tourism operations on the Cape

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|--|--------------------|
| <p>14. Develop a Cape York brand within the context of the regional TNQ brand that engages existing and potential target markets and clearly illustrates to potential visitors the “personality” of the Cape and its appeal as a unique and attractive travel alternative. This would include:</p> <ul style="list-style-type: none"> • Joint marketing activities (TTNQ and TQ) • Development of brand guidelines • Development of destination ‘Hero’ images • Identification and development of unique experiences • Establishment of Visiting Journalists Program (international/ domestic) • Development of a media kit and workshops • Development and links to relevant Websites • Development of display material • Engagement with transport industry including charter aeroplanes, superyachts, 4WD clubs and cruise ships | <p>TTNQ Industry TQ EPA/QPW CYPDA</p> | By December 2011 |

Strategy 5

Develop and maintain tourism resources & infrastructure

The development of tourism in any destination requires significant investment in both hard (accommodation, attractions etc.) and soft (tour routes, signage, tour packages etc.) tourist facilities, supporting public infrastructure (roads, power, water, waste disposal etc.) and service capacities, so as to satisfy the needs of tourists and deliver the promised tourism experience. Communities that attract reasonable levels of tourism visitation need to ensure their infrastructure capacity planning anticipates future visitor numbers and length of stay.

There is a great deal of difference in levels of both basic public infrastructure and utilities and tourism infrastructure between the different communities within Cape York. The priority in some communities will be to first enhance basic community infrastructure capacities before looking to attract tourists. The introduction of tourism will therefore be gradual, and at different rates for each of the communities throughout the region.

The design and 'look and feel' of tourist infrastructure should reflect a strong Cape York character in keeping with the wilderness style of the Cape and the established Cape York 'brand' elements.

The Tropical North Queensland Regional Tourism Investment and Infrastructure Plan (RTIIP) will assist in identifying future infrastructure projects for the region over the next 10 years. The Tropical North Queensland RTIIP is estimated for completion by 2008/2009.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|---|--------------------|
| 15. Continue to improve the standard of dry weather access for tourism operators and communities using the Peninsula Development Road (PDR) and other key local roads through regular maintenance and upgrades ³ . Potential roads include: <ul style="list-style-type: none"> Aurukun Pompuraaw Injinoo Lockhart River | DMR Local Government TTNQ CYPDA ROCCY TQ ICC DOTARS | From 2011 |
| 16. In conjunction with local and regional planning processes, deliver priority tourism infrastructure needs as identified through the RTIIP. Key projects could include: <ul style="list-style-type: none"> Redevelopment of Pajinka site Development of the Mitchell River Loop Road Campgrounds at Kowanyama and Lockhart River Upgrade of Regional airports. (e.g. Bamaga-Weipa-Coen) | Local Government ROCCY ICC DOTARS CYPDA TTNQ TQ (TDO) TQ Airport managers | From 2011 |
| 17. Provide tourism input to the planning and development of basic community infrastructure and services to allow for expected tourism visitation | TQ (TDO) TTNQ Local Government ROCCY CYPDA | From 2011 |
| 18. Utilise available mechanisms to secure long term tenure, ILUAs and/or leasing of traditional lands for tourism developments and investors | TQ (TDO) TTNQ Traditional Owners DNRW ROCCY CYPDA | From 2011 |
| 19. Document mechanisms by which commercially sustainable tourism developments can be established on all tenure types. Examples include: <ul style="list-style-type: none"> Pastoral leases Mining leases Indigenous-controlled land | TQ (TDO) TTNQ Traditional Owners Trust Groups Weipa Town Council Rio Tinto DNRW ROCCY CYPDA | From 2011 |

³ Maximise the availability of the PDR before and after the wet season, giving the tourism industry and local communities an extended shoulder season for access (linked to the "spine and loop" strategy referred to in Action 15).

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|---|--------------------|
| 20. Develop and implement joint venture business opportunities that enable progressive partnerships between commercial tourism developers and operators and Indigenous communities/individuals/pastoral leaseholders | DTRDI TQ (TDO) TQ TTNQ Balkanu Traditional Owners Trust Groups | From 2011 |
| 21. Address infrastructure needs on the Cooktown waterfront in recognition of its importance as a key tourism asset by developing a strategic plan to upgrade marine moorings, slipway and harbour dredging | Cook Shire | From 2011 |
| 22. Upgrade the presentation, visitor facilities and information at all community airport terminals throughout Cape York as they serve as valuable 'entrance' & 'exit' points for the region | Local Government Airport Managers | From 2011 |
| 23. Identify options for overcoming difficulties and dangers at the Seisia jetty and boat ramp being presently utilised for both tourism and industrial purposes | TSRA NPA Regional Council DOT | From 2011 |



Silicon sands, Cape Flattery, Cape York Peninsula

Strategy 6

Improve workforce skills and capacity

Central to the success of a tourism destination is the ability to deliver all elements of the promised experience. It is not enough to have great tourism attractions, products and accommodation if they are not backed up by quality and friendly service.

The level of service supplied is a key determinant of the markets that can be attracted. The wilderness, adventure, culture and ecotourism experiences that Cape York is capable of offering need to be backed up by quality and friendly service that reflects the regional culture and hospitality.

Further tourism development in Cape York will require a strong focus on capacity building across all the diverse range of skills required in the industry from basic competencies in hospitality and service, guiding, environmental and cultural heritage interpretation skills, visitor health and safety, managing people with disabilities, to business development and management. Local tourism operators will also benefit from regular industry workshops on issues such as media training, cultural awareness, industry awareness, wholesale packaging, web-based marketing and integration with mainstream marketing.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|---|--------------------|
| 24. Ensure tourism needs are identified and pursued through the Cape York Employment and Training Strategy | DETA DEIR TTNQ QTIC TQ | From 2011 |
| 25. In conjunction with schools, TAFE and other agencies as appropriate; develop training 'Pathways' from school through vocational training to workplace opportunities | ICC DEEWR TAFE DETA | From 2011 |
| 26. Develop staff exchange opportunities between tourism agencies, organisations and operators | TTNQ TQ QTIC | From 2011 |
| 27. Coordinate a Cape York and Torres Strait Tourism Development Action Plan training fund to support the capacity building of operators | TQ (TDO) TQ DOC DETA DTRDI DEIR DEEWR TTNQ QTIC Cape York Institute CYPDA Industry | From 2011 |

Strategy 7

Attract the financial resources required to develop, maintain and upgrade tourism infrastructure and product

Investment in infrastructure and marketing is required to attract visitors and deliver promised experiences. However, attracting investment in tourism can be challenging. Initial development funds can be substantial and a long term commitment is needed to see sustainable profitable returns. The fickle and dynamic nature of tourism markets and the vulnerability to world political and economic events also need to be taken into account.

Governments and communities recognise the very real economic benefits that tourism is capable of generating, and are willing to facilitate growth in the industry. Nevertheless, governments and communities cannot create those economic benefits by their own efforts exclusively and ultimately private sector investment is required in one form or another, as it is private individuals and companies not governments or communities who generally deliver the tourism experience.

Private sector investment is predominantly influenced and directed by the potential for returns on investment, and protection against risk. Potential projects therefore need to be profitable, ultimately cash positive and sustainable.

Ideally, tourism will continue to develop on Cape York through the combined efforts and contributions of a range of government agencies, traditional owner groups, existing and new industry players and industry organisations, partnerships and relationships.

Successful tourism development within Cape York will require significant initial financial and other in kind assistance, in order to develop the destination to a level of capacity and competency that enables increasing numbers of long term private sector investors to feel confident about the long-term sustainability of tourism in the region.

A strategic focus is needed, directed at activities that will efficiently yield results and provide the best return on investment. Emphasis will need to be given to effecting leverage from the limited funds available through strategic partnerships and cooperative ventures particularly between those who control access to resources (such as land) and respected tourism operators with experience in remote tourism.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|---|--------------------|
| 28. Refer operators and communities to relevant Australian and State Government funding programs to assist with the implementation of this Action Plan and associated tourism development initiatives | TQ (TDO) TTNQ TQ DTRDI DOTARS ICC DEEWR IBA | From 2011 |
| 29. Prepare a Cape York Tourism Investment Prospectus outlining public and private investment opportunities and likely funding sources for distribution to potential tourism developers and potential joint venture partners | TTNQ TQ DTRDI CYPDA ICC Local Government IBA DEEWR DOTARS | |

Strategy 8

Effective dissemination of visitor information and utilisation of the established distribution channels

Tourism destinations must be capable of responding to information needs from potential and/or actual visitors on a number of levels, and be prepared to be part of the distribution channel network.

The dissemination of tourism information is vital to Cape York's ability to attract tourists. A comprehensive and coordinated approach including a variety of methodology is required.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|--|--------------------|
| <p>30. Develop and facilitate a Cape York wide approach to the dissemination of collateral and information i.e. throughout Visitor Centres, 4WD rental companies, commercial tour operators, visitor nodes (campgrounds etc) through the development of:</p> <ul style="list-style-type: none"> • Cape York branded 'hero' image display posters • Cape York Interpretation Manual • Local Interpretive signage • Effective communication of the Alcohol Management Plan (AMP) – including visitor responsibilities • Stinger and Crocodile Safety Signage • Cape York Information Guide (to be reviewed and expanded) • Cape York dedicated section within the framework of the TTNQ website • Cultural Awareness Protocols programs (electronic and print) • Communication system to better inform drivers of weather forecasts and road conditions • Familiarisation program for Cairns' based Visitor Information Centres and Booking Agencies | <p>TQ (TDO) TTNQ TQ</p> | <p>From 2011</p> |



Giant Ant Hill, Cape York

Strategy 9

Establish an ongoing Cape York specific tourism research program

Tourism markets are extremely dynamic and external influences are extremely frequent and fluid.

Effective and efficient tourism development is therefore significantly dependant on well researched, soundly based market monitoring, together with detailed ongoing demographic, psychographic and behavioural research.

Tourism research capabilities available to regional Australia are very limited and of limited value when viewed in the context of sub-regional and local perspectives.

Tourism development on Cape York presently depends largely upon anecdotal intelligence of existing tour operators and others. There is a need to build a greater robustness into the region by developing a continuing reliable data collection, collation, analysis, and interpretive system.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|---|--------------------|
| 31. Identify, and establish partnering arrangements with recognised research facilities e.g. CRC's, JCU, CREC | TTNQ TA TQ CRCST | From 2011 |
| 32. Establish ongoing access to existing sources of relevant research intelligence | TTNQ TA TQ CRCST | From 2011 |
| 33. Design and implement Cape York visitation research data capture systems i.e. Industry administered surveys | TTNQ TA TQ CRCST | From 2011 |
| 34. Utilise existing and new research to identify visitor profiles and regional data profiles | TTNQ TA TQ CRCST | From 2011 |
| 35. Establish mechanisms for interpretation of relevant research data and the distribution of this information to local industry operators and other stakeholders | TTNQ TA TQ CRCST | From 2011 |



Pajinka Beach, Cape York

PART C

Torres Strait Tourism Development Action Plan

1 Introduction

This Action Plan has been developed to capitalise on the Torres Strait's tourism attributes and attractions while at the same time addressing the challenges that tourism faces in the region (refer to Appendix 6).

The recommended actions support the development of a sustainable tourism industry in a young tourism destination. They recognise the underlying 'demand led' nature of the tourism industry and how the Torres Strait is best able to 'supply' that demand with tourism products and services.



View of Thursday Island

PART C

Torres Strait Tourism Development Action Plan

2 Torres Strait Action Plan

Strategy 1

Formalise leadership & coordination of tourism in the region

Fundamental to the successful development of tourism destinations is the presence, drive and coordination provided by tourism 'leaders' and 'champions'.

The tourism development experience of other regions within Australia clearly demonstrates that the greatest success is achieved where tourism leadership is provided from a regional perspective based on a strong working partnership between key regional tourism stakeholders. This model is about maximizing often limited human and financial resources and providing a united voice and strong advocacy for tourism across industry, government and the community.

This tourism leadership role is usually undertaken by a membership based Local Tourism Organisation (LTO) which currently does not exist in the Torres Strait. The LTO model is part of a well-established tourism structure/hierarchy involving the establishment of strong working partnerships between local government, tourism operators and regional, state and federal tourism organisations.

Linked closely to the role of the LTO, is the need to have tourism 'champions' in the community. These tourism champions not only know and advocate the tourism aspirations of their community, but also understand that successful tourism development relies on regional coordination and cooperation and the establishment of strong regional tourism partnerships. Such tourism champions play a vital role in regionally dispersed communities like the Torres Strait where there is a strong sense of local community but where progress is often best achieved through regionally coordinated action.

The following actions address the need for the Torres Strait to develop its tourism leadership capacity and capabilities so as to take ownership of its tourism future.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|--|--------------------|
| 1. Appoint a full time Torres Strait Tourism Development Officer to implement this Action Plan and establish a Torres Strait Local Tourism Organisation (TSLTO).(Priority 1) | TSRA (TDO) Torres Shire Council ACC DTRDI ICC TTNQ | By April 2008 |
| 2. Establish a Torres Strait local tourism champions program within Torres Strait towns/communities to promote communication and coordination between communities and provide support, mentoring and training for these local champions | TSRA (TDO) TSLTO TTNQ | By 2011 |

Strategy 2

Improve community & industry tourism planning and knowledge

Different communities within the Torres Strait are at different stages of understanding what is involved in developing a tourism industry, and what would be the likely demands on, and implications for, their community.

Unlike most destinations where industry is generally the key driver for tourism development, the Torres Strait's close knit community decision making structure suggests that tourism development in the region will see strong community ownership of tourism outcomes, with industry playing the role of a key partner. Such a community driven tourism model necessitates that the community develops the requisite skills and tools to guide wise tourism development while industry will need to adapt to the role of a business partner.

The following actions are targeted at ensuring wide spread community understanding of tourism and its implications, effective determination of community tourism aspirations, and the formulation of specific tourism development actions for each community.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|--|--------------------|
| <p>3. Conduct a tourism awareness and action identification program for Torres Strait communities (both island and NPA) or cluster of communities that choose to engage in tourism, which includes:</p> <ul style="list-style-type: none"> the importance of tourism, its character and its implications community tourism aspirations tourism appeal and opportunities community review of existing product and experiences infrastructure needs visitor management strategies support for exploratory fact finding missions to other emerging destinations/Indigenous communities where tourism has been successfully developed. recognition of Thursday Island as the administrative centre, tourism hub and gateway to the Torres Strait | <p>TSRA (TDO) Local Government Island communities TTNQ TQ</p> | By 2011 |
| <p>4. Coordinate an audit of existing agency business development programs to ensure they appropriately cater for tourism needs</p> | <p>TSRA (TDO) DTRDI QTIC TQ TTNQ</p> | From 2011 |



Coconut Island, Torres Strait

Strategy 3

Develop tourism products, experiences & supporting services

Tourism is a 'people industry' involving the development and supply of a range of facilities, services and experiences to meet the needs, interests, aspirations and expectations of visitors.

The visitor experience continues from the moment of discovery, to arrival and until the moment of departure. A tourist destination must therefore be capable of meeting all the needs tourists might have during their visit.

Tourism product comprises the distinct and unique cultural and natural assets and attractions of the region together with support facilities such as accommodation, dining, entertainment and transport products.

The results of the extensive background research and regional consultation conducted as part of this project provide clear direction for the development of the Torres Strait tourism experience which should strongly reflect core community values and the key attributes of the destination. Such an approach will not only ensure the protection of existing community values and thus elicit wide spread community ownership of the tourism experience, but also provide the Torres Strait with a unique tourism offering which will be attractive to a growing market of tourists looking to immerse themselves in new experiences, environments and cultures.

It is anticipated the Torres Strait will enjoy best results with the development of products and experiences strongly reflecting the following themes:

- Responsible and sustainable ecotourism
- The richness and uniqueness of the Torres Strait people and culture
- Authenticity, low impact and small scale
- Discovery, learning and fulfilling the needs of specialist niche markets e.g. ecotourism, adventure, education, cruise and fishing

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|---|--------------------|
| 5. Prepare a Regional Tourism Product Development Register detailing product development coordination and implementation strategies | TSRA (TDO) TSRA TTNQ TQ | From 2011 |
| 6. Deliver Aussie Host training program in participating communities | QTIC TSRA (TDO) TSLTO TQ | From 2011 |
| 7. Identify and develop key tourism development opportunities and visitor facilities for Torres Strait | TSRA (TDO) TSRA TSLTO TTNQ DTRDI TQ Industry | From 2011 |
| 8. Provide a referral service to those seeking arts and craft development and training support | TSRA (TDO) ICC Arts Qld DTRDI DCITA TQ | From 2011 |
| 9. Develop an effective means of linking existing and new tourism assets and experiences together to enable greater marketability through cooperative efforts. | TSRA (TDO) TSLTO TTNQ | From 2011 |
| 10. Examine opportunities to build shoulder season tourism activity levels and seek to extend season to full 12 months | TSRA (TDO) TSLTO TTNQ | From 2011 |
| 11. Develop a Torres Strait regional events calendar and strategy, and promotional campaign that encourages visitation all year round | TSRA (TDO) TSLTO TTNQ | From 2011 |

Strategy 4

Define and develop the destinational marketing & promotional messages of the Torres Strait

There is a truth in tourism marketing that there will never be enough financial or other resources to do all the things that should or could be done. There is a need therefore to take a strategic approach to selection of marketing targets and activities. Best results will be achieved by giving focus to markets with the highest yield, and market segments to which the destination has greatest appeal.

At the outset it is necessary to determine the marketing and promotional messages that are to be sent to the markets.

The key attributes of these messages are then encapsulated within the destination brand. The destination brand is then the centre-piece of all subsequent promotional activities.

Brand refers to the feelings, perceptions, emotions and values perceived by customers about a particular product or destination. A destination brand/image reflects the affinity and connection that visitors or potential visitors have with a place; its attributes, values and personality. This is what sets it apart from its competitors.

Although a Torres Strait brand has yet to be developed, key brand components could encompass the following:

- Idyllic tropical lifestyle; coconut palms, frangipani, hibiscus, traditional foods & spectacular sunsets
- Genuinely charming, friendly and engaging people, with a culture that has lived in the region for centuries, and the depth and richness of their spiritual beliefs
- Extensive coral reefs
- Tropical cuisine and service, prepared with traditional techniques and rituals
- Islands of different types such as volcanic, coral, mangrove, continental, sandy, uninhabited and inhabited
- Exceptionally clear waters, swimming and reef snorkelling
- Unique story telling through arts and crafts
- Island style fishing opportunities
- Pearling and war history
- Secluded island experience immersed within genuine community life

Promotional and marketing activities will be focused on:

- Growing existing markets, extending length of stay, encouraging repeat visitation, promoting greater dispersal throughout the Torres Strait, create a stronger 'shoulder' season by extending the tourist season into the wet/ tropical season and engendering strong word of mouth referral recommendation
- Attracting high yield markets/segments relative to the destination
- Capturing markets that are presently visiting the broader tropical North Queensland region
- Leveraging tourism networks through Tourism Queensland.
- Positioning and promoting new and existing tourism operations in the Torres Strait.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|--|--------------------|
| <p>12. Develop the Torres Strait brand within the context of the regional TNQ brand that engages existing and potential target markets and clearly illustrates to potential visitors the "personality" of the Torres Strait and its appeal as a unique and attractive travel alternative. This would include:</p> <ul style="list-style-type: none"> • Joint marketing activities (TTNQ and TQ) • Develop brand guidelines • Development of destination 'Hero' images • Identification and development of unique experiences • Establishment of Visiting Journalists Program (international/ domestic) • Development of a media kit and workshops • Development and links to relevant websites • Development of display material • Engagement with transport industry including charter aeroplanes, superyachts, 4WD clubs and cruise ships | <p>TSRA (TDO) TTNQ TSLTO TQ</p> | <p>By 2011</p> |

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|--|--------------------|
| 13. Identify then develop specialist programs to meet the needs of cruise line operators, and promote the Torres Strait as a cruising destination in its own right, as well as a stopping point. | TSRA (TDO) TTNQ TSLTO DTRDI TQ Cruise Operators | From 2011 |
| 14. Review and implement where appropriate the other promotional and marketing strategies and actions as recommended in the TTS business plan. | TSRA (TDO) TTNQ Tourism operators | From 2011 |

Strategy 5 Develop and maintain tourism resources & infrastructure

The development of tourism in any destination requires significant investment in both hard (accommodation, attractions etc.) and soft (tour routes, signage, tour packages etc.) tourist facilities, supporting public infrastructure (roads, power, water, waste disposal etc.) and service capacities, so as to satisfy the needs of tourists and deliver the promised tourism experience. Communities that attract reasonable levels of tourism visitation need to ensure their infrastructure capacity planning anticipates future visitor numbers and length of stay.

There is a great deal of difference in levels of both basic public infrastructure and utilities and tourism infrastructure between the different communities within the Torres Strait. The priority in some communities will be to first enhance basic community infrastructure capacities before looking to attract tourists. The introduction of tourism will therefore be gradual, and at different rates for each of the communities throughout the region.

The design and 'look and feel' of tourist infrastructure should reflect a strong Torres Strait character in keeping with a tropical island style and the established Torres Strait 'brand' elements.

The Tropical North Queensland Regional Tourism Investment and Infrastructure Plan (RTIIP) will identify and prioritise infrastructure projects for the region. The expected completion date is 30 December 2008.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|--|--------------------|
| 15. Address aircraft load limitations at the Horn Island Airstrip and upgrade presentation and visitor facilities to reflect its key role as an 'entrance' and exit point to the region | Torres Shire TSRA (TDO) FAC Airlines DOTARS DOT | From 2011 |
| 16. In conjunction with local and regional planning processes, deliver priority tourism infrastructure needs identified through the RTIIP (the TTNQ RTIIP process to be completed in 2008) | TSRA (TDO) Torres Shire Local Government TQ | From 2011 |
| 17. Provide tourism input to the planning and development of basic community infrastructure and services to allow for expected tourism visitation | TSRA (TDO) Torres Shire Local Government | From 2011 |
| 18. Utilise available mechanisms to secure long term tenure and/or leasing of traditional lands for tourism developments and investors | TSRA (TDO) Torres Shire DNRW | From 2011 |
| 19. Identify tourism implications in relation to a roll-on-roll-off Horn to TI ferry, and ensure appropriate consideration in the feasibility review | TSRA (TDO) Torres Shire DOT Ports Corporation | From 2011 |

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|--|--|--------------------|
| 20. Identify and address tourism transportation needs (particularly as regards transfers to, from and between islands and communities), including use of Seisia jetty and boat ramp, and transport options identified in the island Tourism Development Action Plans. | TSRA (TDO) Torres Shire Local Government DOT Seisia Island Council | From 2011 |
| 21. Where infrastructural issues have a potential impact on tourism, establish MOUs (Memorandum of Understanding) with councils and other managers of infrastructure to ensure tourism considerations are addressed. Issues would include, but are not limited to, mitigating erosion and potential inundation of islands due to climate change. | TSRA (TDO) DNRW Local Government | From 2011 |

Strategy 6 Improve tourism workforce skills and capacity

Central to the success of a tourist destination is the ability to deliver all elements of the promised tourism experience. It is not enough to have great tourism attractions, products and accommodation, it is essential these be backed up by quality and friendly service in all facets of the tourism offering.

The level of service supplied is a key determinant of the markets that can be attracted to a destination. Research reveals that tourists looking to immerse themselves in the type of authentic, adventure and ecotourism experiences the Torres Strait is capable of offering are prepared to pay a premium for such experiences, but these must be quality experiences from all perspectives. The idyllic settings, quality food and appropriate infrastructure will not be enough on their own to attract these premium paying tourists, these aspects must be backed up by quality and friendly service that reflects the unique island culture and hospitality. To ensure that quality service is an integral component of the Torres Strait tourism experience a focused training program recognising the specific needs of the region will need to be developed.

There is very little in the way of special tourism or hospitality skills and competencies presently available within the outer island communities and different communities are at different stages of readiness to develop these capabilities. In addition, no training presently is undertaken to educate local community members in the areas of business and financial management, visitor administration and management, or to encourage and promote a high standard of tourism service.

Tourism in the Torres Strait will require a strong focus on capacity building across all the diverse range of skills required in the industry from basic competencies in hospitality and service, guiding, environmental and cultural heritage interpretation skills, visitor health and safety, managing people with disabilities, to business development and management.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|--|--------------------|
| 22. Ensure tourism needs are identified and pursued through the Torres Strait Employment and Training Strategy | TSRA (TDO) TSLTO DETA QTIC TTNQ | From 2011 |
| 23. In conjunction with schools, TAFE and other agencies as appropriate, develop training 'Pathways' from school through vocational training to workplace opportunities | TSRA (TDO) TAFE ICC DEWR | From 2011 |
| 24. Develop staff exchange opportunities between tourism agencies, organisations and operators | TSRA (TDO) TSRA TTNQ TQ | From 2011 |

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|--|--------------------|
| 25. Coordinate a Cape York and Torres Strait Tourism Development Action Plan training fund to support the capacity building of operators. | TSRA (TDO) TQ DOC DETA DTRDI DEIR DEWR TTNQ QTIC Industry | By 2011 |

Strategy 7

Attract the financial resources required to develop, maintain and upgrade tourism infrastructure and product

Investment in infrastructure and marketing is required to attract visitors and deliver promised experiences. But attracting investment in tourism can be challenging. Initial development funds can be substantial and a long term commitment is needed to see sustainable profitable returns. The fickle and dynamic nature of tourism markets and the vulnerability to world political and economic events also need to be taken into account.

Governments and communities recognise the very real economic benefits that tourism is capable of generating, and are willing to facilitate growth in the industry. Nevertheless, governments and communities cannot create those economic benefits by their own efforts exclusively and ultimately private sector investment is required in one form or another, as it is private individuals and companies not governments or communities who generally deliver the tourism experience.

Private sector investment is predominantly influenced and directed by the potential for returns on investment, and protection against risk. Potential projects therefore need to be profitable, ultimately cash positive and sustainable.

Ideally, tourism will develop within the Torres Strait through the combined efforts and contributions of a range of government agencies, existing and new industry players and industry organisations, partnerships and relationships.

Successful tourism development within the Torres Strait will require significant initial financial and other in kind assistance, in order to develop the destination to a level of capacity and competency that enables long term private sector investors to feel confident about the long-term sustainability of tourism in the region.

A strategic focus is needed, directed at activities that will efficiently yield results and provide the best return on investment. Emphasis will need to be given to effecting leverage from the limited funds available through strategic partnerships and cooperative ventures.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|---|--------------------|
| 26. Refer operators and communities to relevant Australian and State Government funding programs to assist with the implementation of this Action Plan and associated tourism development initiatives | TSRA (TDO) DTRDI DOTARS TQ ICC DEWR IBA Other funding bodies | From 2011 |
| 27. Prepare a Torres Strait Regional Tourism Investment Prospectus for distribution to potential tourism developers and joint venture partners where appropriate | TSRA (TDO) TQ DTRDI ICC IBA Local Government | From 2011 |

Strategy 8

Effective dissemination of visitor information and utilisation of the established distribution channels

Tourism destinations must be capable of responding to information needs from potential and/or actual visitors on a number of levels, and be prepared to be part of the distribution channel network.

Due to tourism in the Torres Strait being in its infancy, there is an excellent opportunity to develop distribution channels in line with the development of the areas tourism brand and identity.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|---|--------------------|
| 28. Establish Torres Strait visitor information distribution capacities at major gateways and hubs i.e. Horn Island, NPA and Thursday Island | TSRA (TDO) TSLTO TTNQ TQ | From 2011 |
| 29. Develop and maintain key stakeholder databases, and establish easy access lines of communication | TSRA (TDO) TSLTO TTNQ | From 2011 |
| 30. Develop a Torres Strait Information Guide including cultural protocols for visitors addressing issues including, but not limited to: <ul style="list-style-type: none"> • Cultural protocols • Alcohol management • Visitor safety (e.g. crocodiles and marine stingers) | TSRA (TDO) TSLTO TTNQ | From 2011 |
| 31. Design and implement a “selling the action plan” project targeting key stakeholders in the tourism industry, communities and government agencies (this project to also include selling the value of a viable tourism industry) | TSRA (TDO) Torres Shire TTNQ | From 2011 |
| 32. Review and implement where appropriate the other visitor information strategies and actions specified in the draft TTS Business Plan | TSRA (TDO) | From 2011 |



4WD Track, Horn Island, Torres Strait

Strategy 9

Establish an ongoing Cape York and Torres Strait specific tourism research program

Tourism markets are extremely dynamic and external influences are extremely frequent and fluid.

Effective and efficient tourism development is therefore significantly dependant on well researched, soundly based market monitoring, together with detailed ongoing demographic, psychographic and behavioural research.

Tourism research capabilities available to regional Australia are very limited and of limited value when viewed in the context of sub-regional and local perspectives.

Tourism development within the Torres Strait will initially depend upon anecdotal intelligence of existing tour operators and others. There is a need to build a greater robustness into the region by developing a continuing reliable data collection, collation, analysis, and interpretive system.

| Recommended Action | Key Stakeholders | Strategy Timeframe |
|---|-----------------------------------|--------------------|
| 33. Identify, and establish partnering arrangements with recognised research facilities e.g. CRC's, JCU, CREC | TSRA TSLTO TTNQ TA TQ | From 2011 |
| 34. Establish ongoing access to existing sources of relevant research intelligence | TSRA TSLTO TTNQ TA TQ | From 2011 |
| 35. Design and implement Cape York visitation research data capture systems i.e. Industry administered surveys | TSRA TSLTO TTNQ TA TQ | From 2011 |
| 36. Utilise existing and new research to identify visitor profiles and regional data profiles | TSRA TSLTO TTNQ TA TQ | From 2011 |
| 37. Establish mechanisms for interpretation of relevant research data and the distribution of this information to local industry operators and other stakeholders | TSRA TSLTO TTNQ TA TQ | From 2011 |



Poruma Island Resort, Torres Strait

Appendices

Appendix 1

Glossary of Terms

| | |
|--------|--|
| AMP | Alcohol Management Plan |
| CREDC | Cairns Regional Economic Development Corporation |
| CYPDA | Cape York Peninsula Development Organisation |
| CYPLUS | Cape York Peninsula Land Use Strategy |
| DEIR | Department of Employment and Industrial Relations |
| DEEWR | Australian Department of Education, Employment and Workplace Relations |
| DETA | Department of Education, Training and the Arts |
| DMR | Department of Main Roads |
| DNRW | Department of Natural Resources and Water |
| DOC | Department of Communities |
| DOT | Department of Transport |
| DOTARS | Department of Transport and Regional Services |
| DTRDI | Department of Tourism, Regional Development and Industry |
| EPA | Environmental Protection Agency |
| ICC | Indigenous Coordination Centre |
| ILUA | Indigenous Land Use Agreement |
| LTO | Local Tourism Organisation |
| NPA | Northern Peninsula Area |
| QPWS | Queensland Parks and Wildlife Service |
| QTIC | Queensland Tourism Industry Council |
| ROCCY | Regional Organisation of Councils Cape York |
| RTO | Regional Tourism Organisation |
| TA | Tourism Australia |
| TAFE | Technical and Further Education |
| TDO | Tourism Development Officer |
| TNQ | Tropical North Queensland |
| TTNQ | Tourism Tropical North Queensland |
| TQ | Tourism Queensland |
| TSRA | Torres Strait Regional Authority |
| TSLTO | Torres Strait Local Tourism Organisation |

Appendix 2

Existing and Potential Markets Cape York

Cape York's main markets continue to be the mature Australian domestic adventurer, together with German-speaking Europeans, British, Americans and New Zealanders travelling as part of a tour group or in hire vehicles.

People want to go to Cape York for an adventure, and for the sense of achievement of making it all the way to the top. Other motivating factors include the scenery, the unspoilt environment, the excellent fishing and bird watching opportunities, and simply 'getting away from it all'.

Tourism is a demand driven and a highly competitive industry.

Effective destination marketing is vital for sustainable tourism destination development and management. But tourist markets are dynamic and have become increasingly sophisticated, discerning, and value conscious.

Furthermore, tourist markets at all levels are constantly being subjected to extensive tourism marketing and promotion from competing destinations throughout Australia and the rest of the world.

Mainstream promotional and marketing systems usually require significant investment. Effective access to established tourism distribution systems is also highly competitive, volatile and expensive.

Promotional and marketing activities therefore need to be strategically focused, financially efficient and capable of performance measurement.

Effective and efficient marketing initiatives must encompass:

- Comprehensive knowledge of existing visitors and of the reasons the destination is appealing to them
- Detailed market research and appreciation of potential target markets, what are their interests, and strategies as to how the destination might deliver on meeting these needs

- The unique and appealing attributes of the destination's tourism products that deliver competitive advantage
- The best methods, people and organisations to work with to promote and sell destination visits and experiences

Cape York is already proven to have high destination appeal, albeit thus far only to limited numbers of past and continuing tourism markets that have been fortunate enough to become alert to the existence and attractions of the destination.

Nevertheless, informed knowledge of both Australian domestic and international leisure tourist markets indicate that sustainable market interest exists for the experiences that the region offers or can potentially offer.

The region also stands to benefit from the additional advantage and potential leverage by increasingly tapping into the high levels of visitation (and repeat visitation) to the broader Cairns and Tropical North Queensland region.

Research commissioned by TTNQ has identified specific segments within both Australian domestic markets and international markets where Cape York holds special appeal. These are summarised as follows:

Existing Domestic Markets

The following table outlines the profiles of segments within Australian domestic markets currently visiting the TNQ region, where there is some existing interest and appeal in Cape York. Significant opportunity exists to grow sustainable visitation from these markets by targeting increased length of stay and / or repeat visits to the region.

Domestic Visitor Segments

| Holiday Type | Geographic Source | Travel Party | Type of Transport | Special Interest |
|--|--|--|-----------------------------------|---|
| Adventure Seekers | Sydney Melbourne Brisbane Intra state Qld | Singles Young Couples Mid-life Older Couples Groups | 4WD Drivers Fly Fly / Drive | Nature-based Adventure |
| Grand Tour/Big Tour (around Australia tourers) | Australia | Couples | Drive | 4WD Touring Fishing Adventure Culture / Heritage |
| Visiting friends and relatives (VFR) | Interstate Intrastate | Families Couples Singles | Fly / Drive | Rest / Relax Shopping Dining |
| Fishing | Sydney Melbourne Brisbane Intra state Qld | Singles Groups Mid-life Older Couples | 4WD Drivers Fly Fly / Drive | Fishing |
| Education | Interstate Intrastate | Singles Couples | Fly / Drive / Coach / Rail | Educational courses Nature-based adventure |

Further details of source markets, demographics, motivations, decision making processes and drivers can be found in "Visitors to Cape York Peninsula – A market Research Report" November 2001, and "Cape York Peninsula Visitor Survey July to October 2002" copies of which are included in volume 2.

These reports highlight that the profile of Cape York Visitors is mainly self-drive, couples and families (two adults and children) between 45 and 64 years of age. Young couples between the ages of 26 to 35 are the region's secondary market.

The reports also observed that Queensland provides the largest market source of visitors to Cape York Peninsula, with a significant proportion represented by the regional local market; i.e. Cairns, Townsville, Mackay. New South Wales and Victoria are the next largest source markets. International visitors account for fewer than 10% of total visitor numbers.

The main length of stay varies between one to two weeks and two to three weeks with just under 20% staying more than four weeks.

The top five stated motives for travelling to Cape York are,

- never been before
- adventure
- fishing
- go to the Tip, and
- Four-wheel driving

Visitors' main activities while in Cape York are:

- Four-wheel driving
- Camping
- Exploring
- Fishing
- Swimming
- Relaxing
- Sightseeing

Niche Markets are small yet significant and include:

- Fly in/ fly out fishing
- Fly in/ fly out sightseers
- Self drive international camping
- Backpackers
- Bird watching – Iron Range and Lockerbie Scrub
- Hunting – pigs. (Rifle and bow-hunters)

A Tourism Queensland survey undertaken in 2003 "Exploring non-visitors' perceptions of Cape York" gave some insight into perceptions and expectations of the Cape York visitor experience. That report indicated that potential visitors appear to rely on hearsay and guesswork when asked to describe their expectations of the facilities and infrastructure at Cape York.

Some think, and indeed hope, that there will be next to nothing in the way of built accommodation and amenities, as they want to experience a truly natural holiday. People generally expect to camp during their Cape York holiday, although some, particularly females and those with children, would hope to spend at least some of their time in a cabin or motel. They are unlikely to book accommodation in advance as they do not want to feel 'locked in' to arrive at a certain place on a certain day.

Potential visitors expect to find the odd fuel stop and general store on their way to the top of Cape York, but they would attempt to take as much as possible with them to avoid paying higher prices in remote areas.

Visitors generally expect to participate in activities like fishing, bird watching, and exploring either by foot or car. While they do not generally have a great desire for organised activities in Cape York, there is some appeal for organised activities such as fishing charters and guided tours.

Potential visitors generally anticipate driving all the way to the top of the Cape, even those living in Melbourne. There is little awareness of options such as flying part or all of the way there, but there is evidence that this may be an appealing option for some.

Safety is an obvious concern for those considering travelling to Cape York, including concerns about crocodiles, flooding and isolation. One of the main ways people plan to deal with these safety concerns is to travel in a group with at least two vehicles.

Existing International Markets

The following table outlines the profiles of segments within international markets currently visiting the TNQ region, where there is some existing interest and appeal in Cape York. As with the domestic markets, significant opportunity also exists to grow volume visitation from these markets by targeting increased length of stay and/or repeat visits to the region.

Key International Markets

| Source | Sector | Target Priority (1 High – 5 Low) |
|-----------------------------|-------------------|-------------------------------------|
| United Kingdom | Self challengers | 1 |
| | Youth market | 4 |
| Germany | Active explorers | 1 |
| | Backpacker/Youth | 4 |
| Europe (excl. UK & Germany) | Active explorers | 1 |
| | Backpacker/ Youth | 4 |
| USA | Adventure seeker | 1 |
| Japan | Fishermen | 3 |
| NZ | Active Explorers | 3 |

Further detailed existing and potential market analysis is available by reference to the Great Tropical Marketing Plan report prepared for TTNQ in 2005, a copy of which is provided in volume 2.

Key marketing issues are that there is relatively low market awareness of the appeal of Cape York as a destination. Marketing activities need to be tailored towards building destination awareness in conjunction with development and distribution of niche touring options such as culture, adventure and fishing.

The following list additionally identifies potential or emerging international visitor market segments which, after further investigation, may offer additional prospects for development:

- Bird Watching – older / high disposable income / singles and small groups from US, Europe and Japan
- Recreational / Sport Fishing – singles and small groups from Europe and US
- Diving – singles and small groups from US, Japan and Europe (There has been very little in the way of promotion, and accordingly there is little recognition in all markets as yet, of existing and potential opportunities for dive experiences north of Port Douglas)
- Cruise Shipping – older / high disposable income / singles and couples from Australia, US, Europe (scheduled cruises along the east coast of the Cape have been increasing in frequencies in recent times)
- Super Yacht cruising
- Family member "war memories" tours – repeat US Market

Appendix 3

Existing and Potential Markets Torres Strait

Tourism is a demand driven and a highly competitive industry.

Effective destination marketing is vital for sustainable tourism destination development and management. But tourist markets are dynamic and have become increasingly sophisticated, discerning, and value conscious.

Furthermore, tourist markets at all levels are constantly being subjected to extensive tourism marketing and promotion from competing destinations throughout Australia and the rest of the world.

Mainstream promotional and marketing systems usually require significant investment. Effective access to established tourism distribution systems is also highly competitive, volatile and expensive.

Promotional and marketing activities therefore need to be strategically focused, financially efficient and capable of performance measurement.

Effective and efficient marketing initiatives must encompass:

- Comprehensive knowledge of existing visitors and of the reasons the destination is appealing to them
- Detailed market research and appreciation of potential target markets, what are their interests, and strategies as to how the destination might deliver on meeting these needs
- The unique and appealing attributes of the destination's tourism products that deliver competitive advantage

- The best methods, people and organisations to work with to promote and sell destination visits and experiences

The Torres Strait is already proven to have high destination appeal, albeit thus far only to a relatively small number of past and continuing tourism markets that have been fortunate enough to become alert to the existence and attractions of the destination.

Nevertheless, informed knowledge of both Australian domestic and international leisure tourist markets indicate that sustainable market interest exists for the experiences that the region offers or can potentially offer.

The region also stands to benefit from the additional advantage and potential leverage of tapping into the current and sustained high levels of visitation (and repeat visitation) to the broader Cairns and Tropical North Queensland region.

Research commissioned by TTNQ has identified specific segments within both Australian domestic markets and international markets where the Torres Strait and Northern Peninsula Area (NPA) region hold special appeal. These are summarised as follows:

Existing Domestic Markets

The following table outlines the profiles of segments within Australian domestic markets currently visiting the TNQ region, where there is some existing interest and appeal in the Torres Strait. Significant opportunity exists to grow sustainable visitation from these markets by targeting increased length of stay and/or repeat visits to the region.

Domestic Visitor Segments

| Holiday Type | Geographic Source | Travel Party | Type of Transport | Special Interest |
|--|---------------------------------|--|-------------------------------|---|
| Adventure Seekers | Sydney Melbourne Brisbane | Singles Young Couples Mid-life Older Couples Groups | Fly / Drive | Nature-based Adventure |
| Indulgence / Spa | Sydney Melbourne Brisbane | Young Couples Mid-life Older Couples | Fly / Drive | Rest / Relax Self discovery |
| Grand Tour/Big Tour (around Australia tourers) | Australia | Couples | Drive | 4WD Touring Fishing Adventure Culture / Heritage |
| Visiting friends and relatives (VFR) | Interstate Intrastate | Families Couples Singles | Fly / Drive | Rest / Relax Shopping Dining |
| Honeymoon | Sydney Melbourne Brisbane | Couples | Fly | Rest / Relax Nature-based Adventure |
| Education | Interstate Intrastate | Singles Couples | Fly / Drive / Coach / Rail | Educational courses Nature-based adventure |
| Island Holiday | Sydney Melbourne Brisbane | Families Couples Singles | Fly / Drive | Beach Relaxation Nature-based |

Further detailed existing and potential market analysis is available by reference to the Great Tropical Marketing Plan report prepared in 2005 a copy of which is provided in volume 2.

Existing International Markets

The following table outlines the profiles of segments within international markets currently visiting the TNQ region, where there is some existing interest and appeal in the Torres Strait. As with the domestic markets, significant opportunity also exists to grow volume visitation from these markets by targeting increased length of stay and / or repeat visits to the region.

Key International Markets

| Source | Sector | Target Priority (1 High – 5 Low) |
|-----------------------------|-------------------------|-------------------------------------|
| United Kingdom | Self challengers | 1 |
| | Youth market | 4 |
| Germany | Active explorers | 1 |
| | Backpacker/Youth | 4 |
| Europe (excl. UK & Germany) | Active explorers | 1 |
| | Backpacker/ Youth | 4 |
| USA | Adventure seeker | 1 |
| NZ | Active Explorers | 3 |
| United Kingdom | Comfort adventures | 2 |
| USA | Sophisticated traveller | 4 |

Further detailed existing and potential market analysis is available by reference to the Great Tropical Marketing Plan report prepared in 2005, a copy of which is provided in Volume 2.

Key marketing issues are that the Torres Strait as a destination has low profile and limited current market awareness of appeal and product availability. Marketing activities need to be tailored towards building destination awareness in conjunction with development and distribution of niche touring options such as culture, adventure and fishing.

The following list additionally identifies potential or emerging international visitor market segments which, after further investigation, may offer additional prospects for development:

- Bird Watching – Older / high disposable income / singles and small groups from US, Europe and Japan
- Recreational / Sport Fishing – Singles and small groups from Europe and US
- Diving – Singles and small groups from US, Japan and Europe

- Cruise Shipping – Older / high disposable income / singles and couples from Australia, US, Europe
- Super Yacht cruising
- Luxury Travel
- Family member “War memories” tours – repeat US Market

Appendix 4

Cape York – Attributes, Attractions and Challenges

Cape York is often described as “one of the last frontiers” and offers a unique visitor experience of natural, cultural and historical diversity. Visitors are attracted by its sparse population, dramatic seasonal variation, limited infrastructure, national parks and Indigenous cultures. However, these drawcards may also be major constraints to tourism development.

Changes should be incremental and ensure that Cape York retains its wild and remote character.

Key Destination Attributes

In the minds of potential visitors, Cape York appears to have a ‘dual personality’; it is described as isolated, remote, rugged and dangerous, yet at the same time, it is seen as beautiful, pristine and serene.

Cape York has an extroverted, energetic, adventurous ‘personality’. It is undoubtedly a place for action and adventure. Making it to the top is seen as a great achievement, due to the perceived dangers and risks of travelling through the region.

Some of the main attributes of the Cape York region are:

- The Cape York region is one of the largest wilderness areas in the world and is one of the most isolated regions in Australia. The majority of the area is essentially rugged landscape, and this wide wilderness area is inhabited by just over 10,000 people. The dusty tracks contrast dramatically with the abundant river systems, crystal clear creeks and spectacular waterfalls
- This is a vast area of unexplored wilderness, magnificent national parks, sacred Aboriginal sites, unexplored rainforest, rugged mountains and swampy marshlands. This is a land of climatic extremes where the creeks run dry, or ten feet high
- Cape York is considered the last Australian frontier and a must-do drive to the Tip by many Australians
- It is an ideal 4WD adventure destination with few sealed roads. It is one of Australia’s great drive adventures
- The region is home to many Indigenous populations and embraces 40,000 year old Indigenous tradition and culture
- There are numerous significant cultural sites such as Quinkan Rock Art Reserve

- The Western Cape fronting the Gulf of Carpentaria is very different from Eastern side where the crystal clear waters of the Great Barrier Reef lap its shores
- It is truly one of the world's last accessible wilderness areas, and a place where you can literally stand on the tip of a continent
- Residents are genuine people with interesting and colourful personal stories
- About 70% of Cape York's biologically diverse regional ecosystems are within the protected area estate which includes a diversity of landscapes and vegetation communities such as heathlands, grasslands, rainforests, eucalypt woodlands, melaleuca swamps, and mangrove forests
- The region features towering termite nests, fast-flowing rivers and remote camping and wilderness lodges
- In addition to its rich Indigenous heritage, the Cape has a historically important and rich past including the early European explorers, settlers and the Pacific War
- Cooktown, which is easily accessible from Cairns, is one of Australia's most historic towns
- Bushwalking, Indigenous culture, four-wheel driving, wildlife, fishing, bird-watching and camping are key attributes of the region
- Near Laura are Split Rock and the Quinkan Aboriginal Rock Art Galleries, which feature some fabulous Aboriginal rock paintings. In June of every odd numbered year, there is the Laura Aboriginal Dance and Cultural Festival, a taste of Aboriginal culture
- Weipa is home to Rio Tinto which mines for bauxite in the area, and offers tours around the workings. The area also offers excellent camping and great fishing
- There are several reputable 4WD TNQ tour companies offering visitors Cape York 4WD adventure tours from Cairns on a seasonal basis. They also work with the regional airlines and small cruise lines to offer fly one way – cruise or drive the other. These operators service both domestic and international markets
- The involvement of indigenous people is growing with several communities and individuals starting tour operations and interpretive services for the visitors. One outstanding example is the involvement of the Mapoon community on the Western Cape with their Turtle Conservation tourist program
- The indigenous art of Cape York is world rated and opportunities exist to fully explore this niche opportunity by hosting "art classes in Cape York" hosted by Indigenous artists
- Fishing enthusiasts from all over the world fish the waters of Cape York. It is considered world class in fishing circles. The tourism industry based on fishing is highly sophisticated and caters well for this market
- There are many large Indigenous community centres along the Cape

- The region is subjected to monsoonal conditions and as a result there are some seasonality considerations that affect visitation to the region. The main visitor season on the Cape is currently between May and November however communities and industry are exploring opportunities to expand and widen the 'shoulders' of the visitor season
- With the exception of Cooktown and Weipa, and to some extent the NPA, tourism infrastructure is relatively minimal
- The Peninsula Developmental Road in the south is the commencement of the 734km drive to the tip of Cape York

Key Attractions and Activities

The core essence of any tourism destination is its 'competitive advantage'; the collation of those elements, unique to the location and the resident community that set it apart from other locations and competitively satisfy tourist needs and aspirations.

Primary markets for the Cape York region will continue to be seasoned travellers. Key activities and attractions of the destination experience that are already reasonably well recognised (principally within the Australian domestic market) will continue to be focused towards the key destination attributes outlined above.

It is likely one of the main targets for many first time visitors will always be the "trip to the tip" but there are significant opportunities to develop itineraries and provide infrastructure that encourage deviations. This may also provide opportunities for repeat visitors who no longer need to get to the Tip but may prefer exploring a particular area or theme. This will in many instances require both soft infrastructure (itineraries, marketing, and themes) and/or hard infrastructure (road and track upgrades and maintenance, campgrounds and toilets, signage etc).

The attractions of Cape York region are truly multi-faceted, and more detailed examination highlights a number of key themes that are common across the entire Cape York region. These themes provide a means of organising and telling the stories of Cape York, consistent with the values of the region and its people. Four themes are suggested:

An enduring culture (CULTURE)

This is predominantly about ongoing Aboriginal cultural traditions on Cape York but it might have some regard for emerging non-Aboriginal traditions. The important messages are about ancient, ongoing, enduring and evolving relationships with the land. The telling of the stories is dependent on the willingness of the individuals and communities concerned but might include:

- Stories of the Cape
- Art/archaeological sites
- Dance
- Contemporary arts
- Cape York bush tucker

The Great Adventure (ADVENTURE)

Without trivialising its history, the story of Cape York is largely about human endeavours in a challenging landscape. These stories have a connection and resonance with present day visitors on an adventure of their own. By drawing out the stories of earlier adventures it is possible to create both relevance and an understanding of Cape York. It also serves to remind that the stories need to be about people rather than events. This may require the re-examination of source material to draw out more people stories. (For example it is of some interest that more than 100 aircraft crashed on Cape York during World War II but it is of more interest to know about the crew of these aircraft, who survived, how they survived and how they were rescued.)

The Great Adventure can be told through the following sub-themes:

- The trip to the tip: from the Jardines to Overland Telegraph Line, the first car in 1928, through to the present day – the ongoing changes in modes of transport
- A timeless landscape (Aboriginal perspectives): the traditional owners' ongoing interaction with the landscape over tens of thousands of years, land and sea, living with the seasons
- On the charts: the story of exploration, the sea explorers (Janszoon, Torres, Cook and Bligh), the overlanders (Leichhardt, Kennedy, Mulligan, Hann etc)
- Hard times: European settlement from the Jardines to the pioneer pastoral stations such as Butcher Hill, Old Laura and Lakefield – isolation and survival
- Passing through: the road and Overland Telegraph Line builders, gold miners, World War II army and air force, pearlers. Generally short but significant engagements with Cape York
- Contemporary lifestyles (Aboriginal and non-Aboriginal): What is it like living on Cape York today?

The nature of wilderness (NATURE)

In keeping with the two themes above, the nature of wilderness should be explored via human interaction with the environment. This could include Aboriginal stories relating to landscape, wildlife or climate, early settler interaction, scientific discovery and perhaps through exposition in literature. Stories will relate to:

- Flora and fauna
- Geology and landscapes
- Fire and water
- Climate

Responsible behaviour (NURTURE)

This theme covers all aspects of a safe, respectful and responsible visit to Cape York and includes:

- Respecting country: visitor codes of behaviour
- Respecting culture (predominantly Aboriginal but also non-Aboriginal): protocols and cross cultural understanding
- Alcohol Management Plans: understanding, compliance, support
- Staying safe: self reliance, crocodiles, stingers
- Understanding: appreciating the social setting of Cape York communities – history, challenges, issues and solutions

Key Challenges

Building on a destination's key attributes and attractions is just one part of the tourism development process. There also needs to be recognition of those destination challenges which, if not appropriately addressed, could constrain future sustainable tourism development. Key challenges for tourism in the Cape York region are as follows:

- Relative destination immaturity with tourism activity and facilities within the region still reasonably limited
- Relatively few, and limited range of, accommodation facilities
- Limited detailed awareness or understanding of the region within markets
- Relatively low level of public infrastructure in some of the communities to support tourism visitation
- Limited number of structured tourism activities, attractions, accommodation and support facilities
- Potential impact of rising fuel prices on the region's current drive tourism market.
- Limited availability of freehold land
- Limitations on use of pastoral leases
- Low level knowledge of tourism and its implications for community life, cultural heritage and traditions within some communities
- Relative lack of tourism shopping
- Low levels of cooperation between tourism stakeholders
- Lack of consistent and established destination image
- Virtual absence of credible research data or monitoring facilities
- There is a significant imbalance of product supply across the various communities within the region
- Limited industry resources available for destination marketing
- Very little training in customer service skills has been undertaken on the ground at many communities within the region

- Limited sources of available funding, with limited capacities. Limited availability of appropriately skilled and reliable human and other support resources available on the ground at many communities within the region
- Time and money are major factors presently preventing people from visiting Cape York. The amount of planning and preparation required for the trip is often seen to be expensive and a considerable effort
- Other barriers include lack of suitable travel companions, life stage (having young children), and simply having so many other amazing places to visit all over Australia
- Seasonality of access to resources. Access to many of the resources on Cape York Peninsula is restricted to the drier months of the year (i.e. May to November). The combination of high rainfall and the standard of roads to many isolated sites results in access not being possible during the wet season
- Limited and costly internal air services within Cape York Peninsula, making it difficult and expensive for visitors to travel by air directly between localities within the region
- Managing the impacts of visitation on natural assets may become an issue as tourist numbers increase on Cape York Peninsula. Visitor numbers may, in some areas, need to be controlled in order not to impact on sensitive natural areas. These impacts include:
 - Increased erosion and destruction of vegetation by vehicles
 - Pollution caused by ineffective waste disposal
 - Destruction of coastal fore dunes by vehicles

The continued growth of tourism in the region will require effective management and monitoring in order to ensure ecological sustainability.

Appendix 5

Cape York Peninsula Land Use Strategy

Cape York Peninsula has been the focus of extensive research and consultation regarding tourism, with the most comprehensive work being undertaken as part of the Cape York Peninsula Land Use Strategy (CYPLUS).

CYPLUS was established as a joint initiative of the Queensland and Australian Governments in 1992 to provide a vehicle for the development of regional land and land-related resource use objectives within the context of Australian and Queensland Ecologically Sustainable Development policy. CYPLUS consisted of three stages:

- Stage 1 which involved data collection, issues identification, and analysis of opportunities and constraints for existing and future land use
- Stage 2 which involved the development of the Stage 2 Report Our Land Our Future (CYRAG 1997) which was a strategy for land and resource use in the form of a vision, principles, broad policies and mechanisms for the implementation of these policies

- Stage 3 CYPLUS implementation phase which effectively is still on-going

Stage 2 of CYPLUS resulted in the development of an overall vision for Cape York and included five specific economic strategies to guide economic development on the Cape. CYPLUS Strategy 11 is the Tourism Strategy for Cape York which provided the following objectives:

- A well-coordinated, non-intrusive, low impact and culturally appropriate industry which provides employment for Cape York Peninsula residents
- Accurate portrayal of the resources and values of the area and promotion of the understanding and appreciation of and respect for the land and its people
- Understanding of the effects of recreational fishing on fish stocks and ecology
- More flexible tenure arrangements which permit and encourage tourism development
- Diversification including a possible cruise ship industry
- Improved involvement in and influence over the tourism industry by Indigenous people
- Integration with other industries such as grazing and mining

On the basis of these objectives the CYPLUS Tourism Strategy specified the following ten key desired outcomes:

- Appropriate protocols for working with stakeholders
- Appropriate management structures and arrangements
- Presentation of accurate and appropriate information
- Appropriate infrastructure
- A high quality tourism product
- A well-managed tourism asset
- An industry with well trained staff
- A comprehensive itinerary
- A comprehensive research base
- Indigenous access and benefits

As a result of the extensive research, consultation and negotiations undertaken in the development of CYPLUS, including the CYPLUS Tourism Strategy, the Strategy's Objectives and Outcomes remain just as valid today as they did over a decade ago. For that reason the CYPLUS Tourism Strategy has been adopted as an underlying basis for the development of this Action Plan.

Appendix 6

Torres Strait – Attributes, Attractions and Challenges

The Torres Strait is relatively unknown as a tourism destination. As home to Australia's "other" Indigenous culture it offers a range of tourism and cultural experiences not normally associated with Australia.

The remoteness and geography of the Torres Strait has meant that its communities were not subjected to many of the experiences that European settlement inflicted on Aboriginal people.

Any tourism development must engage and complement the culture, nature and lifestyle of the people of the Torres Strait.

Key Destination Attributes

The core essence of any tourism destination is its 'competitive advantage'; the collation of those elements, unique to the location and the resident community that set it apart from other locations and competitively satisfy tourist needs and aspirations.

The key tourism attributes of the Torres Strait region that provide a competitive advantage include the following:

- The northern most extremity of Australia with a distinct and unique cultural diversity
- Idyllic tropical and island lifestyle with warm friendly locals
- Virtually unknown by many Australians and therefore has the mystery of waiting to be discovered
- Rich untapped potential in the cultural, fishing, bird watching and other niche market segments
- The Torres Strait links the Coral Sea to the east with the Arafura Sea in the west making it an appealing region for the cruise ship industry
- There are convenient and regular air and sea links and on-carriage connections to key Australian mainland centres
- These idyllic tropical islands, some of them sitting on their own coral reefs or volcanic outcrops, have virtually no tourist infrastructure but the opportunity to experience life in an isolated island community is exactly what makes the islands so appealing to visitors
- Islanders are incredibly hospitable and proud of their culture. Visitors can find themselves learning how to weave a basket, cook in traditional style or be invited along on a local fishing trip
- The Gab Titui Cultural Centre on Thursday Island is a place for visitors to discover the rich cultures of the Indigenous people of the Torres Strait. It is the region's first public keeping place for historical and cultural artefacts, as well as both modern and traditional art
- In addition to its rich island culture, the Torres Strait also has a historically important and rich past from the first European explorers to the last World War

- Japanese pearling links are prominent. Although smaller than in the past, the pearling industry remains a key industry within the region
- Thursday Island, as the administrative and tourism hub for the region, is reasonably well supplied with visitor accommodation, transport access and other service facilities
- Some of the outer islands have established tourist accommodation (e.g. Poruma, Warraber and Masig) and others have experienced some level of tourist visitation
- All but two of the inhabited islands have airstrips and there are several airlines operating light aircraft in the Torres Strait. All have scheduled services and visitors can charter a plane, boat or helicopter

Key Attractions and Activities

Primary markets for the Torres Strait region will be seasoned and sophisticated travellers. The destination must have seamless integration between the destination brand components and the promise and delivery of experiences. Key activities and attractions of the destination experience are/can be as follows:

- Exceptional fishing
- Unique local arts and crafts
- Idyllic island lifestyle
- Rich and varied histories of the islands of the region
- Significant World War II history
- Rich local culture, heritage and traditions and the intricacies of the different clans within the region
- Colourful and skilled local dance troupes
- Fantastic scuba diving experiences
- Sensational sunsets and beach barbecues at full moon
- Beachcombing
- Awesome star gazing
- Intricate local weaving
- Taste sensations of traditional cooking
- Local art, and particularly paintings based on story telling
- The stories at sacred sites
- The drama, joys and tragedies of the pearling history

Key Challenges

Building on a destination's key attributes and attractions is just one part of the tourism development process. There also needs to be recognition of those destination weaknesses which, if not appropriately addressed, could constrain future sustainable tourism development. Key challenges for tourism in the Torres Strait are as follows:

- Relative destination immaturity with tourism in the Torres Strait region still only in its infancy
- Limited and relatively difficult and high cost of access
- Relatively few, and limited range of accommodation facilities

- Lack of regional information
- Relatively low level of public infrastructure in some areas to support tourism visitation
- Relative shortage of structured tourism activities, attractions, accommodation and support facilities
- Limited availability of freehold land
- Low level of community knowledge of tourism and its implications for community life, cultural heritage and traditions
- Low market awareness of the region
- Relative lack of tourism shopping
- Low levels of cooperation between tourism stakeholders
- Lack of consistent and established destination image
- Virtual absence of credible research data or monitoring facilities
- Significant imbalance of product supply across various communities within the region
- Limited destination marketing undertaken to date
- Very little training in customer service skills has been undertaken locally
- Limited sources of available funding, with limited capacities. Extremely limited availability of appropriately skilled human and other support resources



Pearl Farm, Friday Island, Torres Strait

Appendix 7

Funding

The following includes sources of funding from various Government and private sources for Indigenous business development:

- Aboriginal and Torres Strait Islander Arts Fund
- Arts Queensland Small and Major Grants
- Business Entry Point
- Business Resource Centre
- Business Ready Program Indigenous Tourism (BRPIT)
- Commercial Ready
- Department of Education, Employment and Workplace Relation (DEEWR)
- Easy Grants
- Envirofund
- First Start
- Indigenous Business Australia
- Indigenous Business Development
- Indigenous Business Chamber of Australia
- Indigenous Communities and the Environment Grant Programs and Funding
- Indigenous Coordination Centres
- Indigenous Land Corporation
- Indigenous Partnerships Program
- Indigenous Regional Arts Development Fund (IRADF)
- Indigenous Small Business Fund (ISBF)
- Office of Indigenous Policy Coordination (OPIC)
- Office of the Registrar of Aboriginal Corporations (ORCA)
- Natural Heritage Trust
- New Enterprise Incentive Scheme (NEIS)
- Recreational Fisheries Grants Program
- Regional Business Development Scheme (RBDS)
- Regional Partnerships Program
- Torres Strait Regional Authority (TSRA)

