

**EMERALD SHIRE COUNCIL
PEAK DOWNS SHIRE COUNCIL
CENTRAL HIGHLANDS DEVELOPMENT CORPORATION**

TOURISM INDUSTRY DEVELOPMENT PLAN

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&

PROACTIVE TOURISM SERVICES

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EXECUTIVE SUMMARY

This report comprises a Tourism Industry Development Plan for the combined areas of Emerald and Peak Downs Shires in the Central Highlands. The project was commissioned in late 2003 and has been funded by the Kestrel Coal Mine Community Development Fund.

The aims of the project are to:

- a) assist Emerald and Peak Downs Shire Councils to foster and develop a sustainable tourism industry, gain maximum economic and other benefits, and meet the challenges faced by the region.
- b) establish the foundation and direction for a focused, co-ordinated and united approach to the future development of tourism in the study area (the way forward).

Within this framework the main objectives are to:

- Encourage increased visitation;
- Encourage extended length of stay and visitor expenditure;
- Further develop the overall tourism product and enhance the range of experiences offered;
- Encourage a co-ordinated approach and support for tourism; and
- Develop/strengthen industry and stakeholder organisation linkages.

The visitor market is now far more 'travelwise', discerning, selective and value-conscious, and is becoming increasingly segmented as travellers constantly search for new experiences, with many seeking less commercialised destinations in which to spend their leisure time. As well, many leisure travellers are seeking specialised experiences in line with personal interests and hobbies.

The Central Highlands is an area of contrasts ranging from the coalfields, Carnarvon Gorge, the Gemfields, freshwater impoundments, and a large, diverse, agricultural industry.

The area is commonly referred to as a 'region', whereas it is an important sub-regional area within the large Capricorn Region, with the main Central Highlands tourism 'hooks' being:

- Carnarvon Gorge;
- Gemfields; and
- Lake Maraboon.

Although the Central highlands is experiencing growth in visitor numbers, evidenced by visitors to the information centre, product development has not kept pace, and in this context the area appears to be stagnating.

Furthermore, there are indications that in some instances visitor expectations from fossicking are not being met in the Gemfields, and priority action is needed to upgrade the visitor experience in this core product.

THE CHALLENGES

- Strengthening leadership;
- Building sub-regional unity;
- Upgrading and expanding the tourism product to provide new experiences;
- Bringing together the diversity of interests and the number of organisations involved;
- Encouraging a high level of professionalism and customer service standards in order to achieve maximum visitor satisfaction; and
- Creating increased awareness of the Central Highlands.

Emerald and Peak Downs Shires have sound potential for future tourism growth, but the key issue will be to 'hasten slowly', ensuring that visitors are offered quality products, facilities and experiences.

This study has clearly shown that the study area has now reached the stage where a period of consolidation is essential. Consolidation is therefore the underlying thrust of this Tourism Industry Development Plan, focusing on three main issues:

- 1) Strengthening industry leadership;
- 2) Improving product co-ordination; and
- 3) Capitalising on the full range of the assets of both Shires.

ACTION PLAN

This is the core of the Tourism Development Plan and establishes the foundation and direction for sustainable, future, long-term tourism growth. The plan has been primarily designed to cover the 3-5 year period 2004 – 2009.

THE TOURISM VISION

By the year 2009, Emerald and Peak Downs Shires will be collectively recognised as the heartland destination areas of the Central Highlands by providing a range of high quality experiences for mainstream, domestic and international and special-interest markets.

GOALS

1) Leadership Goal

To provide strong leadership and clear direction for tourism growth.

2) Industry Goal

To encourage co-operation, excellence in service standards, and high-quality tourism products and facilities.

3) Consumer Goal

To recognise the needs and aspirations of visitors, ensure that these expectations are satisfied, and marketing promises delivered.

4) Marketing Goal

To increase visitor numbers, length of stay and visitor spending by working with Capricorn Tourism and Tourism Queensland to raise the profile of the Shires and the attractions they offer.

To ensure a clear path is established for future industry development, the Action Plan contained in Chapter 8 builds on the Vision and broad Goals, and is aimed at focusing the efforts of all stakeholders.

This Action Plan brings together the recommendations included in the body of the report under a series of Strategic Objectives, together with suggested priorities, organisational responsibility, and alliances.

RECOMMENDATIONS

The Action Plan comprises 33 actions detailed in Chapter 8, covering:

Industry Structure, Leadership and Co-ordination

- Local Government tourism policies;
- Central Highlands Tourism;
- Capricorn Tourism; and
- The Need for a Paid Tourism Project Officer.

Product Development Needs and Opportunities

- The Need for a New Visitor Information Centre (VIC)
 - The Need to Upgrade the Sapphire Gemfields Experience
 - Opportunity to Develop Agricultural Tourism
 - Opportunity to Develop a Local Food Signature Dish
 - Opportunity for a Regional Interpretive Centre
 - Opportunity for Guided Tours of the Botanical Gardens
 - The Need to Create a High Profile for Capella
 - The Need to Highlight Capella Pioneer Village
 - The Need to Complete the Sealing of the Capella-Rubyvale Road
 - The Need to Upgrade Facilities at the Lilyvale Waterhole
 - The Need to Build the Special-Event Sector
 - The Need to Address Free Overnight Stopovers by Motorhomes and Caravans
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- Opportunity for Interpretation of the Coal Industry
- Pilot Program for Youth Involvement in Tourism
- The Opportunity to Establish Geocaching
- Opportunity for Product Packaging
- The Need to Upskill Operators

Market Development

- The Importance of Co-operative Marketing
- The Need for a Central Highlands Touring Map
- Marketing Issues

The Plan provides for an integrated approach and it is essential that recommendations are implemented in a systematic manner. Most importantly, time must be allowed for the recommendations to be implemented and for the results to become evident.

In formulating this Action Plan, the consultancy team recognises that there may be human resource and financial constraints on the implementation of the recommendations in accordance with the suggested timing and organisational responsibility. However, the key issue will be to steadily implement the recommendations as resources permit.

To give this Plan life and momentum, the goodwill and co-operation of all stakeholders will be a mandatory element. The vision can be realised over time, but this will only happen with steady application and firm commitment.

EXPECTED OUTCOMES

The expected primary outcomes of the Action Plan are:

- Higher levels of domestic and international visitors;
- Extended length of stay;
- Higher yield;
- High level of visitor satisfaction;
- Increased co-operation, networking and product co-ordination within the industry across the Central Highlands; and
- Increased economic, employment and other benefits over time for both Emerald and Peak Downs Shires.



1.0 INTRODUCTION

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The project was commissioned in late 2003 and has been funded by the Kestrel Coal Mine Community Development Fund.

1.1 PROJECT AIM AND OBJECTIVES

The aims of the project are to:

- a) assist Emerald and Peak Downs Shire Councils to foster and develop a sustainable tourism industry, gain maximum economic and other benefits, and meet the challenges faced by the region.
- b) establish the foundation and direction for a focused, co-ordinated and united approach to the future development of tourism in the study area (the way forward).

Within this framework the main objectives are to:

- Encourage increased visitation;
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- Further develop the overall tourism product and enhance the range of experiences offered;
- Encourage a co-ordinated approach and support for tourism; and
- Develop/strengthen industry and stakeholder organisation linkages.

1.2 METHODOLOGY

The study was conducted in the following ways:

1) Literature & Website Review

The consultancy team reviewed relevant reports, research data and other information including:

- Reports and data sourced from Tourism Queensland;
 - Tourism statistical data for the Capricorn Region and Central Highlands;
 - Promotional material; and
 - Shire and regional websites.
-

2) **Fieldwork**

Fieldwork involved an assessment of the overall product and specific components, including:

- Access;
- Natural and built attractions;
- Accommodation;
- Heritage;
- Primary industries;
- Events;
- Signage;
- Visitor Information Centres and services; and
- Support facilities and services.

In addition, the team has investigated potential linkages with adjoining areas.

3) **Research Data**

Research data and associated information included in this report is based on existing tourism data sourced from Tourism Queensland, The Bureau of Tourism Research, Capricorn Tourism, Central Highlands Development Corporation, and Central Highlands Tourism Organisation. Tourism trend information has been sourced from Rob Tonge & Associate's 2003 national tourism trend research program.

4) **Consultation**

Extensive consultation has been a key element of the study and was conducted in two ways to obtain the widest possible input from stakeholders:

a) Workshops

Workshops were held at Emerald, the Gemfields and Capella.

These workshops were very well supported with tourism, business, community and Council representatives attending, and produced high quality input to the study.

b) Interviews

Discussions were held with Tourism Queensland, the Environment Protection Agency, and the Department of State Development.

Within the study area interviews were conducted with tourism operators, representatives of Councils, visitor information centres and support businesses. These interviews were mainly on a face-to-face basis and where this was not possible, stakeholders were contacted by phone.

1.3 REPORT COMPILATION ISSUES

In parallel with this report prepared for Emerald and Peak Downs Shires, the consultants have been jointly conducting a similar tourism planning study for Belyando Shire, focusing on Clermont and environs.

Although Belyando Shire is in the Mackay Region, this Shire, in the context of tourism, must be considered an integral part of the Central Highlands.

Both studies have clearly shown that with the traffic on the Peak Downs and Gregory Highways, Belyando Shire, and specifically Clermont, need to be closely linked with Emerald and Capella and vice versa in the context of tourism, because each of the Shires offers different but complementary experiences that, in combination, have the potential to extend visitors' length of stay and therefore spending, increasing economic benefits across the two study areas.

For these reasons and to ensure compatibility of the Emerald/Peak Downs and Belyando Tourism Planning reports, the same format and some duplication of information occurs in both documents.

1.4 STUDY TEAM

- Rob Tonge - Rob Tonge & Associates (Project Co-ordinator)
- Graeme Lee - *Proactive* Tourism Services

ACKNOWLEDGMENT

Rowena Davies, Central Highlands Development Corporation, Maureen Burns, Central Highlands Tourist Organisation Inc. (trading as Central Highlands Tourism), Councillors and Council Officers from Emerald and Peak Downs Shire Councils and the many community and business representatives who provided invaluable input to the study.

DISCLAIMER

As this report contains forecasts and projections that can be affected by unforeseen variables, no guarantee, express or implied, is given that the projections herein will be achieved. Information in this report has been drawn from sources believed to be reliable, and on the best possible estimates. However, as independent verification is not possible, neither Rob Tonge & Associates and its staff, nor its team members, servants or agents, take responsibility for any errors which may occur, however caused.

This report is solely for the use of the party to whom it is addressed. We take no responsibility to any third party who relies on the whole or any part of our report unless authorised by us in writing to so use the report.

2.0 SITUATION ANALYSIS

2.1 TOURISM ENVIRONMENT

A number of factors have had, and are continuing to have, substantial impact on industry development:

GLOBAL ISSUES

- Globalisation
- Currency exchange rate fluctuations.
- Change in focus from traditional overseas markets to Asian countries and potential market development of China and India in the longer term.
- Increasing competition from overseas destinations including emerging destinations such as South Africa, Eastern Europe and South America.
- Advances in technology, particularly the communications sector.
- Threat of terrorism.

NATIONAL ISSUES

- Major structural and socio-economic change across Australia.
 - Large increases in Public Liability insurance.
 - Increased marketing efforts by State and Territory tourism authorities, resulting in strong interstate competition.
 - Deregulation of the domestic airline industry.
 - Shutdown of Ansett Airlines and emergence of Virgin Blue.
 - Privatisation of key airports and rail infrastructure.
 - Increased emphasis on planning for tourism, and sustainable industry growth.
 - Increased emphasis on training, particularly cross-cultural understanding.
 - Changes in domestic holiday travel patterns with the high growth in short breaks.
 - Greater emphasis on tourism development in regional Australia.
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2.2 FACTORS INFLUENCING FUTURE GROWTH AND DEVELOPMENT OF TOURISM

- Ageing of the population;
- Changes in household structure;
- Changes in income distribution;
- Increasing role of women in society;
- Declining job security;
- Increasing multi-culturalism in Australia's population;
- Decline of rural communities;
- Increasing use of the Internet;
- Increasing concern for the environment;
- Expectations of high standards of service;
- Shorter pre-trip planning time;
- Growth in caravanning;
- Growth in 4WD vehicle ownership;
- Emphasis on health and fitness;
- Changing holiday patterns;
- Increasing segmentation of the market;
- Increasing demand for learning experiences; and
- Growth in industrial tourism.

2.3 CENTRAL HIGHLANDS TOURISM INDUSTRY – OVERVIEW

This study was undertaken against a background of prolonged drought in the Central Highlands, increases in interest rates, impending local, state and federal government elections, a visitor market that is more segmented, discerning and demanding than ever before, a market that is constantly seeking new and meaningful experiences, and fierce competition across all sectors of the industry.

The Central Highlands is an area of contrasts ranging from the coalfields, Carnarvon Gorge, the Gemfields, freshwater impoundments, and a large, diverse, agricultural industry.

The area is commonly referred to as a 'region', whereas it is an important sub-regional area within the large Capricorn Region, with the main Central Highlands tourism 'hooks' being:

- Carnarvon Gorge ⁽¹⁾;
- Gemfields ⁽¹⁾; and
- Lake Maraboon ⁽²⁾.

Although the Central highlands is experiencing growth in visitor numbers, evidenced by visitors to the information centre, product development has not kept pace, and in this context the area appears to be stagnating.

(1) Identified by Tourism Queensland.

(2) Identified by Rob Tonge & Associate's National Tourism Trend Research Program

Furthermore, given the current 'state of play' within the Gemfields, and the indications that in some instances visitor expectations from fossicking are not being met, priority action is needed to upgrade the visitor experience in this Central Highlands core product.

On the credit side, this study has clearly shown that opportunities exist for both Emerald and Peak Downs Shires to continue to build tourism, making use of existing product assets. Accordingly, the fundamental challenges are . . .

- strengthening leadership;
- building sub-regional unity;
- upgrading and expanding the tourism product to provide new experiences;
- bringing together the diversity of interests and the number of organisations involved;
- encouraging a high level of professionalism and customer service standards in order to achieve maximum visitor satisfaction; and
- creating increased awareness of the Central Highlands.

In conducting this study one of the main issues identified is the limited human and financial resources needed to implement the Action Plan contained in this report. Irrespective of the recommendations it was possible to make, the implementation resource constraint was the overriding issue in formulating appropriate recommendations.

During the consultation process participants put forward a range of suggestions, needs and 'wish lists'. While a number of these suggestions form the basis of some of the recommendations, again this input had to be tempered in line with the resources available.

Emerald and Peak Downs Shires have sound potential for future tourism growth, but the key issue will be to 'hasten slowly', ensuring that visitors are offered quality products, facilities and experiences.

This study has clearly shown that the study area has now reached the stage where a period of consolidation is essential. Consolidation is therefore the underlying thrust of this Tourism Industry Development Plan, focusing on three main issues:

- 1) Strengthening industry leadership;
- 2) Improving product co-ordination; and
- 3) Capitalising on the full range of the assets of both Shires.

Despite the challenges facing both Shires, and given that firstly, the recommendations in this report are implemented, and secondly, that all stakeholders are willing to work cohesively towards the common goal, there is no reason why the tourism industry cannot grow and prosper – but it will take time.

3.0 PUBLIC CONSULTATION WORKSHOP OUTCOMES

This section of the report highlights the perceptions and comments raised by participants at the public workshop sessions held at Emerald, Capella and the Gemfields.

3.1 EMERALD WORKSHOP: 14 Participants

- Key question at the Information Centre: *'What is there to see in Emerald?'* The issue is to encourage visitors to stop in town.
- Common questions asked by visitors:
 - Can we visit - Citrus Orchard?*
 - Coal Mine?*
 - Cotton farm?*

The challenge is how to organise these activities from town.

- Council has taken over public liability insurance for local events to allow these events to continue.
 - The coal industry is a major area of interest for visitors. Opportunities exist to explain the development and operation of this industry.
 - 1,500 motel beds in town.
 - Occupancy rates are low at weekends, apart from weddings and events.
 - Bulk of accommodation patronage is corporate (mines and agriculture).
 - New Emerald 2003 brochure has helped accommodation operators and has been well received by the public.
 - Lack of marketing of Emerald as a conference destination; limited venue capacity.
 - 2PH is the largest privately owned citrus orchard in the southern hemisphere.
 - Need for CHT, primary industry and mining groups to work together to develop agricultural and coal industry tours.
 - Night-time view of coal mines is spectacular and is much more impressive than in daytime.
 - Difficulty with farm tour activities because peak cropping season is the low visitor season. Little agricultural activity for visitors to see during the peak visitor season.
 - Major tourism attraction, Kiely's Farm, runs cotton industry video for visitors when no crop to see.
 - The Visitor Information Centre needs to show what there is to see and do in the district.
-

- Emerald is a good service centre for visitors but the message is not getting out enough.
- Emerald is an ideal base for 3-4 days to explore the Central Highlands. The Emerald VIC suggests tours to Gemfields, Capella, Springsure, Carnarvon, etc.
- Emerald does not sell itself well and needs to be more upfront about what the town has to offer. Investigate a PR campaign about crops, coal, Gemfields.
- Town is not truck-friendly – no free hot showers. Only one caravan park allows access to showers for \$3. Need easily accessible hot showers for a low-cost fee in Emerald to cater for intransit travellers.
- Visiting friends and relatives market is a key sector for the area but does not seem to be exploited.
- Botanic Gardens are another important attraction but guides and self-guided tours should be developed.
- Need to investigate the establishment of roadside viewing areas for coal mines.
- Council approval processes for operators need streamlining.

3.2 SAPPHIRE GEMFIELDS WORKSHOP : 18 Participants

- Identity not strong as a 'region' (Central Highlands);
 - Central Queensland needs to be seen as a mining attraction:
 - ☛ Sapphires : Gemfields
 - ☛ Petrified wood : Alpha
 - ☛ Thunder Eggs : Mt. Hay
 - ☛ Gold and Copper : Clermont
 - ☛ Coal : Across Central Qld.
 - Capricorn Tourism seen as aligned with the coast and do regular coastal promotions. Promotions for the Gemfields by the RTO are often conducted at the wrong time of the year for the Central Highlands.
 - Fossicking should be made more easy for visitors, e.g. rip up fossicking areas so it is easier for them to dig the fossicking sites. If this is possible the Dept. of Natural Resources and Mines would probably have to agree and facilitate it.
 - Visitors have high expectations of finding a sapphire. In reality it is hard work and success is not assured:
 - ☛ It has been reported to the consultants that some operators of tourist facilities 'salt' buckets of wash sold to visitors, which distorts reality and raises expectations to unrealistic levels;
 - ☛ It has also been reported that unscrupulous operators are damaging the reputation of the Gemfields in two ways: Firstly by building unrealistic expectations of the ease of finding sapphires, and secondly, by some swapping good stones for inferior stones during the cutting process. (**Note:** these issues could not be verified independently by the consultants either way).
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- Sustainable and progressive development of fossicking areas is needed.
- Public liability costs are a major impediment to tourism businesses and access to sites, which means operators can only take visitors to public lands in most cases.
- There is a need to educate the public about sapphire mining, e.g. the underground mine tours tell of nine weeks digging for no sapphires. The public is seeking instant gratification.
- People who are happy with a bucket of dirt are coming all year round. Serious fossickers visit only for three months but every year in many cases.
- There is a need for better print collateral for fossickers. The existing Government maps that are given with the Miner's Licence Kit are not very good:

Potential project: More up-to-date maps and walking trail maps. Need to be capable of quick and easy updating.

- The face of mining in Sapphire fields has changed dramatically:
 - ☛ 1970s 90% machinery mining 10% tourists
 - ☛ 2003 10% machinery mining 90% tourists
 - Interpretive centre could be established on the Gemfields to cover geological history, maps, interpretive matters. This would serve to:
 - ☛ Orientate visitors;
 - ☛ Give lessons in geology;
 - ☛ Encourage educational group tours; and
 - ☛ Identify the fossicking areas and where significant stones have been found.
 - Advertising needs to be truthful to give visitors confidence.
 - Operators on the Gemfields need to work co-operatively, e.g. mine tours, accommodation, fossicking tours.
 - The area suffered during 2003 from better competitive air packages to destinations like Cairns, which has cut into the Brisbane and Melbourne drive markets that go through the area to the Tropical North.
 - Melbourne is the key market as people leave Melbourne for its winter and travel to and through the Gemfields.
 - Gems and not the regional name (Central Highlands) are the key motivator:
 - ☛ People come to the Central Highlands for Carnarvon Gorge and sapphires.
 - ☛ Perhaps the name 'Sapphire Fields' not 'Gemfields' should be used as it has more impact and identifies a unique feature for the region, the sapphire, not just any gem.
 - Need to create alliances with other destinations. Carnarvon and Emerald are very important to the Gemfields for sending visitors from those areas.
 - Visitor information centres are important and accommodation houses should fax availabilities to the Emerald VIC.
-

- The tourist season starts after Easter, with July the peak. September school holidays mark the end:
 - ☛ The start is really the first cold snap in Melbourne and the southern markets. If a mild winter in Melbourne, the season is delayed and shortened.
 - ☛ Accommodation is fully booked in mid-July, which creates a problem.

Appearance of the area is poor, with many out-of-date and/or invalid signs that are confusing and ugly, promoting/directing to things that are closed or long gone:

- ☛ Many non-mining items litter the roadsides and should be removed, Miners Common should also be tidied.
- ☛ Toilets should be installed at fossicking sites as appearance is disgusting at present with no toilet facilities but plenty of evidence on the ground.
- A single map of all the fossicking areas should be made available to all visitors so they can get around. (The difficulty is the changing position of roads/tracks etc. in mining areas, and the maps are not accurate).
- There is a problem recommending particular gem businesses, tours or accommodation, where perceived bad operators are not recommended by others. However, this could cause legal problems:
 - ☛ A core of keen, committed operators exist. Those present the meeting covered tours, mining, gems and accommodation.
 - ☛ Very keen to clean up the image of the Gemfields.
- A potential project may be a co-operative, whereby only those who have similar ideas are recommended and work together (Legal entity).

3.3 CAPELLA WORKSHOP : 20 Participants

- Capricorn Tourism very rarely comes to Capella.
- Capella Agencies operates/houses visitor information in the shop but is not trained in correct visitor information display. How to best present brochures is the issue:
 - ☛ Needs Emerald and Clermont information to display and needs supplies regularly.
- Entry appearance to the town needs upgrading.
- Signage on the Pioneer Village needs improvement.
- Potential projects are a bird trail (200 species identified) and a geological trail.
- Upgrading of the Rubyvale–Capella Road to full bitumen would be an advantage for Capella as people would stop in the town and avoid the Rubyvale-Emerald back track movement before heading north. This may actually encourage travel to Capella that otherwise might not occur.
- Lilyvale Waterhole and the Peaks are key geographical features. Is there a possibility of working with the landholders to promote these?

- Capella Pioneer Village supported by Central Highlands VIC in Emerald, as part of an Emerald-based drive tour:
 - ☛ Emerald – Capella – Gemfields – Emerald.
 - ☛ Emerald – Capella – Clermont – Emerald
- Opportunities exist to see other regional attractions such as coal mines, Lilyvale Waterhole and then back to Emerald.
- Sunflower and sorghum fields near the Peaks (Margenta area) are spectacular but not well known scenic drive (Drive #2).
- Lilyvale Waterhole, cemetery and old town area could be better promoted.
- Capella Pioneer Village is open 9-12 noon Monday to Friday from March to October (tourist season), and on Sundays 10-12 noon.
- Volunteers an issue – difficult to get enough volunteers to operate the Pioneer Village, let alone a VIC as well, due to lack of human resources.
- High School is involved with community activities, perhaps the school could become involved in tourism.
- Cemetery and family history should be promoted – caravan park visitors are keen on the family history angle, according to operator.
- Motorhomes staying overnight on the main street free of charge is an issue. Do these people do any business in the town?
- Aquatic Centre doesn't have good signage:
 - ☛ The access off the Highway is poor and difficult if you are not a local.
 - ☛ Some signs have been put up by Shire Council but MRD signage is an issue still.
 - ☛ The same issue applies to the Cultural Centre and caravan park for signs by MRD.
- Capella is not mentioned on MRD signage on the Highway – Emerald – Clermont. Only on green and white directional signage in Emerald.
- Main street beautification under the control of Council Engineer. May address some of the signage matters.

3.4 CENTRAL HIGHLANDS TOURISM (CHT) WORKSHOP : 14 Participants

- Association started in the 1980s and currently has 71 members @ \$350 approximately.
 - The majority of retailers and food outlets in Emerald do not assist with promotion and don't recognise tourism economic benefit to their businesses.
 - The CHT needs to mount a campaign targeting the business sector to get them involved and to explain how tourism benefits the whole community.
 - The concept of a tourism levy could be investigated.
-

- Councils currently contribute 50¢ per head of population to both the CHT and Capricorn tourism.
- Comments on the Capricorn Regional Tourism Organisation:
 - ☛ Capricorn markets the Gemfields and Carnarvon Gorge only, and does not really market Central Highlands as a destination area.
 - ☛ Capricorn RTA does extensive target marketing in South-East Queensland and Northern NSW areas.
 - ☛ Capricorn Tourism is not looking after the Central Highlands. Wrong information in the material they publish (there was confusion over which particular publication/s and if in fact it was produced by Capricorn Tourism or a private company).
 - ☛ Some Central Highlands Councils see little point in staying within Capricorn Tourism. Duarunga Shire has no commercial tourism product/operators.
 - ☛ Capricorn Tourism sends quarterly reports to local Council CEOs but this information rarely gets passed on to tourism representatives/interests within Council.
 - ☛ Gemfest: one of the main Central Highlands tourism events – considering either Capricorn or Outback Regional Tourism Organisations for membership. At this stage the preference is for Outback RTO.
 - ☛ Regional and local tourism organisations need to improve communication and Councils have an important role to play in this issue.
- Emerald VIC has 23 volunteers at the present time and past numbers had a peak of 28-30.
- ACC funding in 2004/05 with focus on projects in rural areas and tourism will be an important project.
- Business and community groups need to have material given to them explaining the value of tourism, e.g. *'What Tourism Does for You'*. Possible survey through the VIC.
- Need for a paid Tourism Officer for the Central Highlands. Important to have activities co-ordinated so every Shire gets its fair share of support and that no single Council controls the activities.



4.0 SWOT ANALYSIS – EMERALD AND PEAK DOWNS SHIRES

4.1 EMERALD SHIRE

STRENGTHS

- ☺ Council support for tourism;
- ☺ Strategic location at the intersection of two main highways;
- ☺ Lake Maraboon - recreational fishing and water sports;
- ☺ Gateway to the Gemfields;
- ☺ Fossicking;
- ☺ Agricultural diversity;
- ☺ Commercial hub of the Central Highlands;
- ☺ Transport services : air/road/rail;
- ☺ Heritage Railway Station;
- ☺ Strategic Visitor Information Centre;
- ☺ Range and volume of accommodation;
- ☺ Botanical Gardens;
- ☺ Van Gogh Sunflower Painting;
- ☺ Kiely's Farm;
- ☺ Sporting facilities; and
- ☺ Ludwig Leichhardt history.

WEAKNESSES

- ☹ Temporary Visitor Information Centre;
 - ☹ Seasonality of tourism;
 - ☹ Difficulty gaining access to agriculture for tourism;
 - ☹ Perception in some sectors of the market that the Gemfields are 'worked out' for fossicking;
 - ☹ Poor visual appeal of the Gemfields;
 - ☹ Some publicity and operators creating unrealistic expectations of finding sapphires;
 - ☹ Emerald generally perceived as a service centre, not a tourist destination;
 - ☹ High cost of air travel to Emerald; and
 - ☹ Inconsistent service standards.
-

OPPORTUNITIES

- ☹ Development of a new Visitor Information Centre;
- ☹ Cleanup of the Gemfields;
- ☹ Development of a Central Highlands Interpretive Centre;
- ☹ Making more effective use of existing tourism assets;
- ☹ Development of agricultural and industrial tourism product;
- ☹ Improvement in communication between Council/CHT/CHDO/Capricorn Tourism.
- ☹ Production of a low-cost regional tourist map; and
- ☹ Promotion of Emerald as a venue for smaller conferences and sporting events.

THREATS

- ☹ Increasing competition for the drive market;
- ☹ Future interest rate uncertainty;
- ☹ Currency fluctuations impacting on inbound travel;
- ☹ Potential changes in Federal and State Government policies and programs;
- ☹ Potential changes in Local Government with the March 2004 elections;
- ☹ Increasing choice of options for leisure tourism;
- ☹ Changes in the workforce; increasing part-time and casual work; inherent fear of retrenchment, impacting on propensity to travel; and
- ☹ Threat of terrorism in Australia.

COMPETITIVE ADVANTAGES

- ☺ Strategic location : junction of two major highways;
 - ☺ Gateway to the Gemfields;
 - ☺ Lake Maraboon;
 - ☺ Central Highlands Visitor Information Centre; and
 - ☺ Range and volume of accommodation.
-

4.2 PEAK DOWNS SHIRE

STRENGTHS

- ☺ Council support for tourism;
- ☺ Located on the Great Inland Way;
- ☺ Cultural Centre;
- ☺ Aquatic Centre;
- ☺ Covered Arena;
- ☺ Pioneer Village;
- ☺ Proximity & access to the Gemfields;
- ☺ Main street parking areas;
- ☺ Range of accommodation;
- ☺ Established tourist drives around the Shire with supporting brochures;
- ☺ High quality promotional material for the town of Capella, the Cultural and Aquatic Centres and Covered Arena;
- ☺ Good reputation of the Cultural Centre within the entertainment industry – able to attract acts and entertainers of national and international significance;
- ☺ Cultural event hub for the Central Highlands;
- ☺ Agricultural and shearers' strike history;
- ☺ Lilyvale Waterhole; and
- ☺ Proximity to coal mines for potential roadside viewing by drive tourists.

WEAKNESSES

- ⊗ Town entrances (both directions) need improvement;
- ⊗ Generally perceived as simply a fuel/food/comfort stop;
- ⊗ Little information on the town approaches to highlight the Cultural and Aquatic Centres and Covered Arena;
- ⊗ Motorhomes over-nighting free of charge in main street parking area;
- ⊗ Limited visitor information services;
- ⊗ Pioneer Village needs greater prominence and more volunteers to operate; and
- ⊗ Seasonality of tourism.

OPPORTUNITIES

- ⊖ Continue to build Capella as an event venue;
- ⊖ Promote Capella as the cultural event hub of the Central Highlands;
- ⊖ Further develop the Pioneer Village profile and visual impact;
- ⊖ Complete sealing of the Capella/Rubyvale Road;
- ⊖ Continue with development of the Capella Creek Nature Walk;
- ⊖ Establish and maintain alliances with Emerald, Clermont and Gemfields information centres, and all other Central Highland centres;
- ⊖ Continue to support the Central Highlands Tourism and Capricorn Tourism;
- ⊖ Develop an Agricultural Heritage Interpretive Centre;
- ⊖ Work with mines and other appropriate shires to identify and develop a coal industry interpretive trail; and
- ⊖ Increase promotion of the Aquatic Centre's facilities to intransit visitors, VFR market and residents.

THREATS

- ⊖ Increasing competition for the drive market;
- ⊖ Future interest rate uncertainty;
- ⊖ Currency fluctuations impacting on inbound travel;
- ⊖ Potential changes in Federal and State Government policies and programs;
- ⊖ Potential changes in Local Government with the March 2004 elections;
- ⊖ Increasing choice of options for leisure tourism;
- ⊖ Changes in the workforce; increasing part-time and casual work; inherent fear of retrenchment, impacting on propensity to travel; and
- ⊖ Threat of terrorism in Australia.

COMPETITIVE ADVANTAGES

- ⊕ Event and Leisure cluster : Cultural, Aquatic Centres and Covered Arena;
- ⊕ Established tourist drive network;
- ⊕ Central location in the Central Highlands sub-region; and
- ⊕ Progressive and strong Council support.

5.0 INDUSTRY STRUCTURE, LEADERSHIP AND CO-ORDINATION

The Central Highlands tourism industry is at the stage in its development where it must consolidate its activities and use the gains made over recent years to establish a solid foundation for the next phase of its development.

Support from local government will remain crucial for the development of tourism in the region for some considerable time to come, and until the industry is able to take greater charge of its own affairs and become less reliant on the direct intervention and assistance from local government.

5.1 LOCAL GOVERNMENT

Local government is an integral part of tourism in the Central Highlands region. Due to the greater recognition of tourism as a key industry sector, the role of local government is becoming increasingly important in initiating, facilitating and supporting the development of tourism.

Under planning regulations, local authorities are required to approve policies for the use of land within their areas and to control land-use changes under the approved planning guidelines. Local authorities are therefore in a position to protect and conserve existing and potential attractions such as the outstanding natural landscapes, attractive towns, and locations with cultural, historical, or activity interest.

If these areas are to remain as visitor resources, their character needs to be recognised and subsequently protected and enhanced. It is therefore essential for local authorities to adopt policies which will prevent damage to resources as a result of unsympathetic changes in land-use or management.

The appeal of any particular area for visitors will reflect the range and scale of the resources the area possesses, both in terms of nature-based, built and other attributes, and the specific amenities provided.

Councils have the responsibility to ensure that those areas which form part of the product are kept to a high standard. This implies taking steps to retain the region's attractive characteristics and ensuring that future product development is of high quality, aesthetically pleasing, and sensitive to the local environment.

Each of the Central Highlands councils has addressed tourism in various ways, and while there are differences in emphasis from council to council, formation of the Central Highlands Tourism has been a major step forward in establishing co-operative efforts across the area.

The supporting role of local government has been instrumental in, and vital to, the growth of tourism in the region. As well as providing infrastructure support in the form of visitor information centres, parks and amenities for use by visitors, the Councils have also provided funding for tourism development and promotion.

The level of each Council's contribution is, to a large extent, dependent upon the constraints under which all Councils operate. However from the perspective of developing tourism for employment and economic development benefits, it is essential that individual Councils continue to provide this support and recognise this support within their own budgets.

Nevertheless, recognition of tourism as a driver of economic development needs to be reinforced, and there is the need for local government bodies to develop consistent core tourism policies across municipal boundaries. In developing this initiative, the objective should be to develop tourism policies that:

- Create an environment of certainty and predictability, encouraging private sector investment;
- Encourage the development and delivery of quality tourism product support infrastructure and services;
- Provide clear processes by which tourism applications are managed;
- Recognise the region's strengths, development needs and planning implications; and
- Reflect the views of relevant interest groups including environmental and community groups, peak industry bodies and tourism operators.

Tourism policies should be developed with due recognition of:

- The marketing and destination development role of the regional tourism authority, Capricorn Tourism;
- The regional product strengths identified in this strategy;
- The current role of tourism in each of the local government areas, its potential, role and direction; and
- The appropriate balance between environmental, heritage, cultural and lifestyle considerations and tourism development.

To assist Councils in the formulation of appropriate tourism policies, generic guidelines are given in Appendix 1.

RECOMMENDATION

Develop and adopt consistent local government core tourism policies across the Central Highlands.

5.2 ROLE OF TOURISM QUEENSLAND

The primary tourism industry development and marketing organisation for Queensland is Tourism Queensland. Its main role is to attract visitors from interstate and overseas to holiday in Queensland. In doing this, Tourism Queensland's activities also raise awareness of the various regions within Queensland, thereby encouraging Queenslanders to holiday in their own state.

Importantly, for the Central Highlands, Tourism Queensland supports and works closely with Capricorn Tourism. Also, Tourism Queensland's Road Tourism Unit works with the Great Inland Way Promotions Group Inc. on the Great Inland Way themed tourism route.

5.3 THE ROLES OF REGIONAL AND LOCAL TOURISM ORGANISATIONS

In addressing the local and regional tourism organisation structure, from the outset the different functions of local and regional tourism organisations need to be clarified.

Irrespective of type, location and resources, regional and local tourism organisations exist for five main reasons:

- 1) To encourage increased visitation;
- 2) To extend length of stay;
- 3) To maximise visitor spending;
- 4) To ensure visitors experience a high level of satisfaction with the product, services and experiences offered in the area; and
- 5) To encourage sustainable tourism development, thereby generating increased economic, employment and other benefits for the community.

LOCAL TOURISM ORGANISATIONS (LTOs)

Role:

A local tourism organisation is an inward focused organisation concerned with the issues and visitor experiences in the local area. An LTO is primarily a visitor-servicing organisation which should act as a facilitator working closely with Councils to upgrade facilities and services.

External marketing should be undertaken as a co-operative initiative with the Regional Tourism Organisation (RTO). External marketing is defined as any marketing activity undertaken outside the Capricorn Region.

The primary LTO responsibilities are:

- To promote tourism within the local area;
 - To be the peak body representing local tourism operators;
 - To work in close co-operation with local government;
 - To act as a focal point for all organisations and individuals involved in tourism in the local and sub-regional area;
 - To work in close co-operation with the RTO in all aspects of its activities;
 - To provide comprehensive, high quality visitor information services; and
 - To encourage operator support for the RTO.
-

REGIONAL TOURISM ORGANISATIONS (RTOs)

Role:

The regional tourism organisation (Capricorn Tourism) is the 'umbrella body' which covers several local government authorities and a number of local tourism associations, and provides the important link between local stakeholders and the state tourism authority (Tourism Queensland). The aim of the organisation is to enhance the image of the region and encourage increased visitation from external markets.

The two key RTO roles are:

- 1) To represent and promote the region **externally** to domestic and international target markets.
- 2) To provide leadership and strategic direction for the region's tourism industry.

The primary RTO responsibilities are:

- To facilitate co-operation, co-ordination and communication within and across all sectors of the regional tourism industry;
- To assist Councils and other stakeholder organisations in planning for the development of tourism; and
- To undertake destination development activities encompassing product and infrastructure development to achieve new/expanded attractions, experiences, facilities and services for visitors.

5.4 CENTRAL HIGHLANDS TOURIST ORGANISATION INC. (Trading as Central Highlands Tourism - CHT)

The CHT is categorised as a local tourism organisation and at the time of conducting this study, was supported by 71 members including Councils.

The organisation plays an important role in the development of the Central Highlands tourism industry and the CHT will need to be closely involved with the implementation of this Tourism Development Plan.

During the consultation process some concerns were expressed that the CHT is 'top heavy' with Council representatives. However, given the need and importance of ongoing local government support for tourism growth, the consultants are of the opinion no changes in representation are warranted at this point in time.

As with most local tourism organisations, human and financial resources are limited, therefore, it is essential the CHT continues to maintain close links with Capricorn Tourism, irrespective of any changes in the CHT committee.

An important part of the work of the CHT is improving understanding within the community and Council of the roles of the local, regional and state tourism organisations.

It is understood that a dual membership fee system was introduced in 2002/03, i.e. one fee paid to Capricorn Tourism with a percentage returned to CHT. However, it is further understood that CHT discontinued the dual membership system in 2003/04 due to problems associated with GST Registration and a number of CHT members choosing not to take up dual membership.

However, this system of membership funding has several benefits:

- One fee gives membership to both organisations;
- Avoids 'double-dipping';
- Members make only one payment;
- One administration of the process; and
- Saves CHT collecting memberships.

The consultants are of the opinion this system needs to be reconsidered By CHT members with the proviso that both parties must be certain about what each organisation is getting. The system should therefore be based on a clear and concise Memorandum of Understanding that also recognises the differences in resources, capacity and role of both organisations.

RECOMMENDATION

Consider reintroduction of the dual membership system based on a Memorandum of Understanding between Capricorn Tourism and Central Highlands Tourism.

5.5 CAPRICORN TOURISM

Capricorn Tourism is one of 14 regional tourism organisations (RTOs) across the State recognised and supported by the State Government through Tourism Queensland.

The consultation outcomes indicated the need for improved communication between Central Highlands Councils/stakeholders and Capricorn Tourism.

Like all regional tourism authorities, Capricorn Tourism provides regular reports to Central Highland organisations of activities and achievements. However, in several instances it appears the information is not getting through to the right people, and in other instances it seems the information is either skimmed or ignored.

Overall there seems to be a lack of understanding by those not directly involved in a tourism operation of the role of the regional tourism authority and what this organisation does for the Central Highlands.

The Central Highlands has good representation on the Capricorn Tourism Board. Even so, and apart from the reports submitted by the RTO, communication is a two-way process, and Central Highland stakeholders who doubt the worth of the regional organisation need to make the effort to communicate with Capricorn Tourism and find out about the work of the RTO.

In the same way there is an equal responsibility of Capricorn Tourism to regularly visit the Central Highlands to keep Central Highlands stakeholders informed of the RTO's activities and its destination development role.

In the 12 months from July 2002 to June 2003, Capricorn Tourism, in co-operation with Tourism Queensland, gained over \$12 million of publicity for the region, an increase of 300% over the publicity achieved in 2001/02 (\$3 million).

The publicity in 2002/03 included a substantial percentage for the Central Highlands.

Criticism is often levelled at the regional tourism authority without foundation. For example, during the consultation process Capricorn Tourism was criticised for inaccurate information in a promotional publication, whereas it was subsequently found that the publication was published by a private organisation. In cases such as this the regional tourism authority has no control whatsoever on publications produced by other organisations.

From discussions with the General Manager of Capricorn Tourism, Central Highland representatives on the Board and a brief review of the RTO activities and achievements, the consultants are of the opinion that Capricorn Tourism is working effectively for the Central Highlands.

Building and maintaining a close and harmonious working relationship with Capricorn Tourism is, and will continue to be, a crucial element in the Central Highlands.

RECOMMENDATIONS

- 1) *That CHT and Capricorn Tourism review existing lines of communication and seek ways they can be improved.*
- 2) *Encourage ongoing local government support for Capricorn Tourism.*

5.6 THE NEED FOR A PAID TOURISM PROJECT OFFICER

One main issue identified by this study is the very small number of people working in a voluntary basis, with sufficient time to drive the Central Highlands tourism industry forward.

If for whatever reason these dedicated stakeholders (the 'champions') are unable to continue in the role (this will inevitably happen at some time in the future), in all probability the further development of tourism in the Central Highlands will suffer to a substantial degree.

There comes a time in every area striving to encourage tourism, when it is necessary to move forward from voluntary efforts to a person employed full time to do the co-ordination and development legwork. The consultants are firmly of the opinion that the Central Highlands has reached this stage.

Furthermore, the consultants also believe that without a paid Tourism Project Officer it will be difficult to address most of the recommended actions in this Tourism Plan report. The need for a permanent Tourism Officer was first identified in the 1999 Central Highlands Tourism Plan prepared by the Central Highlands Development Corporation.

The consultants consider the appointment of a permanent Tourism Project Officer a priority issue and an essential element in achieving future tourism growth.

A three-year employment contract for this position is essential. There have been and continues to be, cases where a Tourism Manager or Tourism Project Officer has been employed with grant funding for only 12 months, whereas research in a number of localities has clearly shown that a 12-month contract is unrealistic, for the reason that despite the best efforts of the appointee, it takes time to properly and effectively implement initiatives to foster industry development and co-ordination. It also takes time for the appointee to gain the confidence of stakeholders.

Just at the time when this work is beginning to take effect, the 12-month funding runs out, employment ceases, and consequently, much of the effort cannot be driven forward and is wasted, and industry enthusiasm, support and alliances rapidly decline.

Experience in several areas where this situation has occurred indicates that subsequent efforts to revitalise the industry can take considerable time (in some instances 2 years), to regain momentum.

Although grant funding may be available to assist with the initial period of employment of a Tourism Project Officer, additional funding will be required for the implementation of the Tourism Industry Development Plan. Furthermore, this funding will need to be sustained.

Grant funding may be available for the initial period of employment, i.e. one year, but as funding needs to be sustained for a minimum of three years, project by project grants should be explored for Year 2. However, Central Highland Councils would subsequently need to seriously consider funding this Tourism Project Officer as a permanent position.

Currently it is estimated that the annual cost of this Officer would be \$80,000 - \$85,000 including salary, on-costs and vehicle.

Independence of this position is essential and while ideally the Tourism Project Officer should be responsible to Central Highlands Tourism, the CHT does not have the capacity at present to provide this management role. Consideration should be given to establishing a special management committee with the following or similar representation

Organisation	Representatives
Councils (CEOs)	2
CHT	2
CHDC	1
Total	5

Note: The title Tourism Project Officer has been selected for the purposes of this report. Another title, for example, Tourism Development Officer or Tourism Co-ordinator, may be deemed more appropriate for grant funding purposes.

RECOMMENDATION

Work towards employment of a Tourism Project Officer by mid 2005.



6.0 PRODUCT DEVELOPMENT NEEDS AND OPPORTUNITIES

6.1 THE NEED FOR A NEW VISITOR INFORMATION CENTRE (VIC)

Since the destruction by fire of the Central Highlands Visitor Information Centre in Emerald in 2000, this facility has been operated from a small demountable building.

The existing brochure displays and service are as comprehensive as is possible within the constraints of the limited space available in the building, and despite these constraints the VIC provided information to 63,000 visitors during the period 2001 – 2003. Since 2001 the number of visitors to the centre has increased by 36.5%.

While the annual VIC visitor growth rates fluctuate from year to year, the number of travellers calling at the information centre at Emerald continues to increase, and the above figures demonstrate the importance of this facility not only to Emerald Shire, but the Central Highlands sub-region, i.e. Emerald is the strategically positioned tourism support hub for the western gateway to the Capricorn Region.

At the time of conducting this study, Emerald Shire Council was finalising plans for a new VIC, and an application has been made for grant funding. The consultants regard the establishment of a new information centre to be a crucial element for the further development of the Shire and Central Highland's tourism industry, and strongly support the proposed new VIC and grant funding application.

RECOMMENDATION

Pursue the establishment of the new Emerald Visitor Information Centre as a high priority requirement.

6.2 THE NEED TO UPGRADE THE SAPPHIRE GEMFIELDS EXPERIENCE

From inspection of the Gemfields, and the issues raised at the public meeting, it is evident that for continued and solid tourism growth, the need exists to upgrade the Gemfields experience appeal to visitors.

The key issues are:

- 1) Visually, visitors expect mullock heaps and mining machinery. However, various areas have old car bodies and rubbish that bear no relation to mining and are creating a very poor expression of this important area. There are also a number of outdated signs of businesses no longer operating. A concerted effort is required to clean up Gemfield areas and maintain the Commons.
-

- 2) Lack of toilet facilities in the main fossicking areas has become a major issue with some areas being described as 'disgusting' and 'unhygienic'.

This issue needs to be treated as a matter of priority, and representation to the Department of Natural Resources & Mines should be made as soon as possible.

- 3) Concerns have been widely experienced regarding the need for Gemfield operators to maintain appropriate and expected standards in dealing with visitors. There is a core of committed operators who are providing quality and value visitor experiences but are concerned at the variation in standards.

Concerns have also been expressed that in some promotional material, visitors are being given unrealistic expectations of finding sapphires.

The consultants have reviewed the recently introduced *Tourism Services Act 2003*, *Tourism Services Regulation 2003*, and *Tourism Services Code of Conduct 2003*, and have had discussions with the Justice Department to ascertain what constraints (if any) could be applied in the Gemfields to ensure visitors receive a value experience. However, it was found that the Act only applies to inbound operators.

At the request of Gemfield operators at the consultation workshop, the consultants have researched the options available to ensure professional and ethical standards are maintained across the Gemfields.

The most appropriate option identified is the establishment of a Co-operative. In this way a Code of Practice and standards can be established, and only those businesses meeting these standards would be accepted into the Co-operative.

This would also have significant marketing advantages, for the reason that by encouraging visitors to patronise Co-op members (accredited), they would be assured of a quality, value and ethical experience.

Summary information for the operation of a Co-operative is given in Appendix 2.

- 4) From discussions with stakeholders, the fieldwork observations for this study, and given the issues identified by the consultants plus the range of other issues outside the scope of this report, it is evident there is a need for a comprehensive strategic plan for the Sapphire Gemfields, encompassing all the villages.

The consultants strongly support the commissioning of a Gemfields Strategic Plan.

RECOMMENDATIONS

- 1) *Undertake a clean-up program to remove rubbish, old car bodies and out-of-date signs from the Gemfields.*
- 2) *Make representation to the Department of Natural Resources & Mines to address potential health hazards in main fossicking areas due to the lack of toilets.*
- 3) *Form a Steering Committee to initiate the establishment of a Gemfields Operators' Co-operative (suggested title) to set appropriate standards of operation for members.*
- 4) *Initiate the process to commission a Sapphire Gemfields Strategic Plan.*

6.3 OPPORTUNITY TO DEVELOP AGRICULTURAL TOURISM

The large, diverse agricultural industry throughout the Emerald and Peak Downs Shires provides the basis and opportunity to create agricultural tourism as a major visitor experience.

Independent research ⁽¹⁾ conducted during the two-year period 2001-2003 identified strong and increasing demand by visitors for learning experiences as in industrial and agricultural tourism products and experiences in the form of observation, guided tours and interaction with the people directly involved. This trend is evident Australia-wide.

At present, agri-tourism product is limited and is primarily centred on:

- Kiely's Farm
- Farmstays
- Emerald Agricultural College Tours

It is understood that broadacre farm tours have been tried but were unsuccessful. Also, tours of the Cotton Gin have been discontinued.

It is not surprising that agricultural tourism in the study area has been less than successful. To date agri-tourism in the Shires has been unco-ordinated and dependent on individual travellers, whereas the effective way of developing this product is through organised tours taking in a range of agricultural experiences.

Opportunities include:

- Increasing the number and variety of farm tours;
- Inspections of processing/packing and farm-gate sales; and
- Interpretation of the different crops on site (signage) for people driving around the area.

⁽¹⁾ Rob Tonge & Associates National Tourism Trends Research Program 2001-2003.

Development of agricultural tourism will initially require a systematic approach involving an audit of primary producers to identify those who would be interested, and determining the most appropriate way of arranging inspections. This initiative will be time-consuming in the developmental stage and a special Agri-Tourism Steering Committee will need to be established, with representation from CHT, CHDC, Emerald Agricultural College, DPI and Councils. Emerald Agricultural College has indicated interest in assisting, and has a wide range of primary industry contacts.

Because this project would be a substantial expansion of the tourism product for the area and a boost for primary industry, grant funding should be sought for the research and development stage.

In developing the project the key issue is linking agricultural and cropping activities with visitation seasons.

The Table on page 29 illustrates the link between cropping and agricultural activities and the visitation cycle of the area. The visitor statistics are the average number of enquiries handled by the Emerald VIC over the three-year period 2001 to 2003 calendar years. These statistics are very helpful as they represent actual visitor enquiries rather than a sample of visitors, as is the case with other visitor research studies.

The number of visitors is important, but the value of these statistics is in the identification of peak, shoulder and low visitor seasons over a substantial period of years.

When this information is plotted against the cropping and agricultural activities in the area, it is easy to see which crops are being undertaken in relation to visitor activity. The Table indicates that there are potential opportunities to interpret and/or inspect the operations of farms that are engaged in mandarins, oranges, avocados, and other small crops, during the peak visitor season.

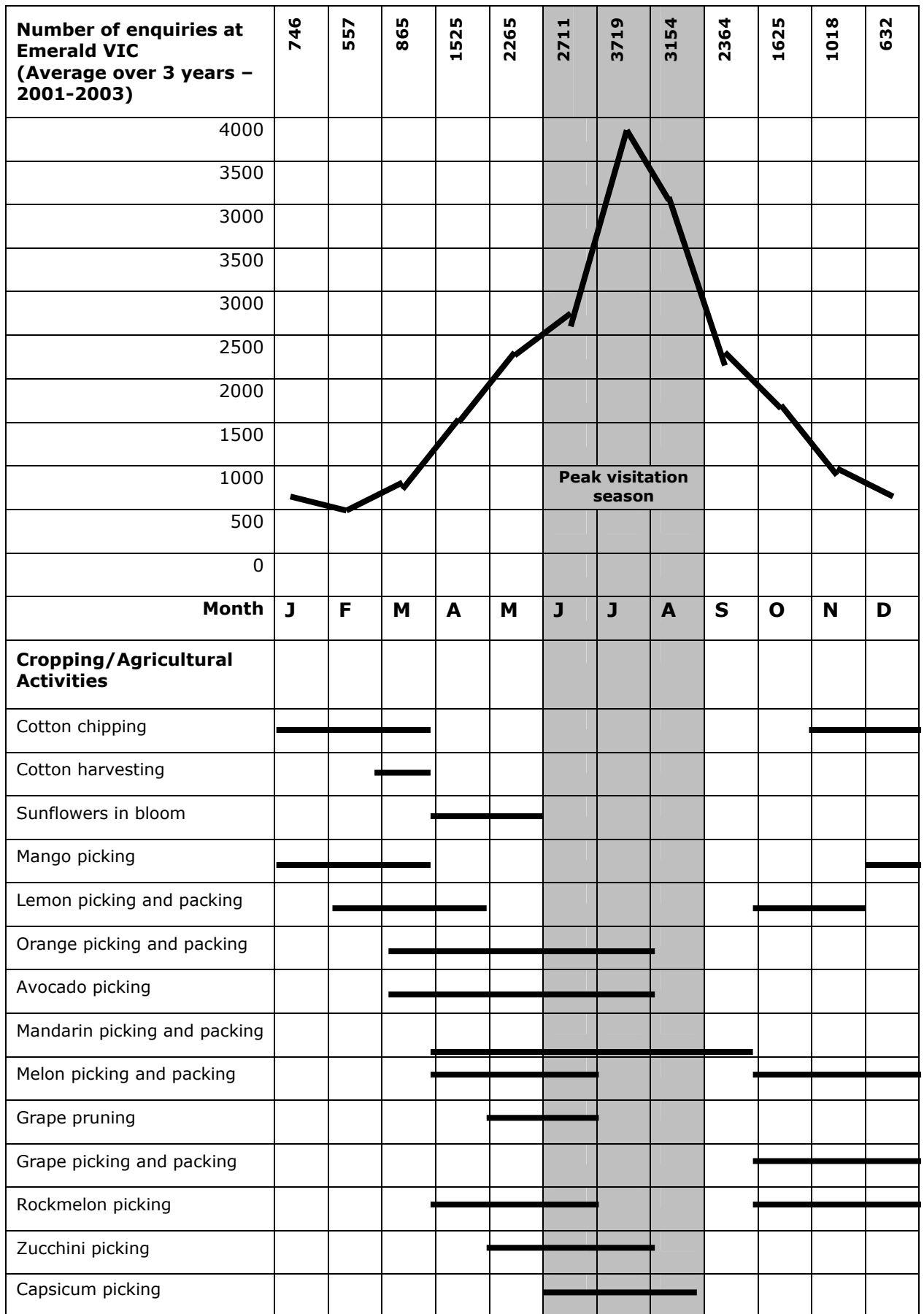
It may be possible to develop drive routes through the various parts of the Shires to encourage visitors to travel around the area to see particular cropping activities. There could also be an opportunity to work with willing property owners to have tours and/or agri-business visits by industry groups, or to encourage farm-gate sales of suitable produce.

It appears that opportunities exist to promote the agricultural and food aspects of the Shires during the April and May period, as many cropping/agricultural activities occur prior to the start of the peak visitor season.

The Table is based on a general cycle of farming activities that occurs within the area, but this can be altered by factors such as drought or unusual climatic events that provide opportunities for new crops outside the normal cycle, or the exclusion of normal activities.

RECOMMENDATION

Establish a Steering Committee and seek grant funding to develop agricultural tourism.



6.4 OPPORTUNITY TO DEVELOP A LOCAL FOOD SIGNATURE DISH

The Central Highlands produces a wide range of high quality food products, e.g. horticultural produce, red claw and beef. However, there is the need and opportunity to capitalise on these products for tourism. To achieve this objective the opportunity exists for the establishment of an event highlighting locally produced food.

Local/regional food is now widely recognised within the tourism industry as an experience sought by many visitors, and one way to place greater emphasis on the area's food products would be the creation of a signature dish (or dishes) specifically for the Emerald and Peak Downs Shires, focusing on these products. Local restaurants could then be encouraged to feature these dishes, giving visitors the opportunity to experience local food.

An example of signature dish promotion is described in a publication produced by the Department of Primary Industries titled '*Queensland's Menu – Queensland Food, Quality from Australia*' which details a number of signature dishes.

This initiative could possibly be established as a competitive event with categories for chefs and hospitality students, and held every two years either as a separate event, or combined with an existing event, the benefits of this event being:

- Promotion of the area's food products;
- The compilation over time of a Central Highlands Recipe Book based on local product;
- Publicity for the Shires; and
- Economic benefits.

RECOMMENDATION

Initiate action within the region's hospitality industry to develop a signature dish for Emerald/Peak Downs Shires.

6.5 OPPORTUNITY FOR A REGIONAL INTERPRETIVE CENTRE

Opportunity exists for the establishment of a Central Highlands Interpretive Centre at Emerald, adjacent to, or as an extension of, the Visitor Information Centre. It is proposed that this centre would showcase:

- the agricultural industry;
 - the coal industry;
 - the irrigation system;
 - the Gemfields; and
 - the Leichhardt explorer history.
-

Displays should be aimed at creating visitor interest by incorporating appropriate 3D exhibits, photographic and interactive displays/interpretation and learning experiences. Much of the displays should be able to be obtained at minimal cost through industry sector sponsorship. Developed on this basis, this centre would create a new, important attraction, thereby strengthening the tourism product of the Shire.

Another interpretive centre concept raised during the consultation process is the development of a specialised interpretive centre for the Gemfields covering the geology, mining techniques, fossicking, cutting of stones and the history of the Gemfields.

The consultants consider this project would be a worthwhile addition to the tourism infrastructure of the region, but only in the longer term. Other issues identified in the report need to be addressed prior to establishing a Gemfields interpretive centre. A Central Highlands interpretive centre adjacent to or adjoining the Emerald Visitor Information Centre covering the key features and attractions of the whole of the Central Highlands would provide a better solution to converting enquiries into visitation. The Central Highlands VIC at Emerald is the focal point of visitor enquiries and can be a very effective point of influence with visitors.

An interpretive facility that covered the Gemfields, coal, Carnarvon Gorge, agricultural industries and Lake Maraboon located at the VIC would showcase the whole of the Central Highlands with a view to encourage longer and dispersed stays in the region. From an operational perspective this display could be managed with little additional effort by the Visitor Information Centre staff, who man the VIC on a daily basis throughout the year.

However, while the consultants cannot justify a Gemfields interpretive centre at this point in time, the potential for this project should be reviewed within 3-5 years. With sufficient funds to develop, maintain and staff a specialised interpretive centre covering all aspects of the Gemfields, such a facility would be an important and valuable expansion to the region's tourism infrastructure. Issues of seasonality that would impact on the operations of a dedicated interpretive centre would need to be overcome.

RECOMMENDATIONS

- 1) *Initiate planning and costing for a regional Interpretive Centre at Emerald. Seek grant funding and sponsorship for developing the project.*
- 2) *Review the potential for a Gemfields Interpretive Centre within 3-5 years.*

6.6 OPPORTUNITY FOR GUIDED TOURS OF THE BOTANICAL GARDENS

Emerald's Botanical Gardens are impressive and are a major attraction for both visitors and residents. At present visitors are encouraged to take self-guided walks through the Gardens.

There is a high level of interest in botanical gardens, particularly for older age groups, and subject to volunteers being available, there is opportunity to reinforce the attraction appeal of this feature by conducting guided tours through the gardens during the peak tourist season months, June, July and August.

Tour guiding would require training of volunteers, particularly in interpretation, and could be co-ordinated by the visitor information centre. It is also envisaged that tour bookings would be made through the VIC.

RECOMMENDATION

Investigate the feasibility of conducting guided tours through the Botanical Gardens.

6.7 THE NEED TO CREATE A HIGH PROFILE FOR CAPELLA

For visitors, the impression of Capella is a typical small country town and a convenient fuel, food and/or comfort stop with good parking adjacent to the highway. Nevertheless, there is little on the highway to indicate the excellent facilities that have been established.

The key issues that need to be addressed are:

a) Entry Statements

Prominent entry statements are required on both the northbound and southbound approaches to the town. Approaching from the south, the town cannot be seen until nearing the outskirts, because of the terrain.

b) Landscaping

Good landscaping can become an attraction in itself and there are a number of places where landscaping is a feature, attracting many visitors and encouraging extended length of stay.

One such example of a small community that has become widely known for its landscaping along the highway, is Nebo.

The Urban Landscape Masterplan for Capella has the potential to create a significantly higher profile for the town. The consultants consider this initiative to be an important element in developing tourism and encouraging travellers to stop. However, it is recognised that limited water supply has been the main constraint in completing landscaping.

c) Capella Creek Nature Walk

The nature walk will be another good facility for the town and one that will strengthen tourism product and link in effectively with the Landscaping Masterplan.

When widely publicised, the bird trail associated with the nature walk should be of interest to a sector of the visitor market that is yet untapped in the Central Highlands.

Birdwatching is an activity rapidly growing in popularity with domestic and international visitors. The birdwatching sector is mainly couples in the over 40s age group.

d) Signage

There are four main signage issues that need to be addressed:

1) Tourism Entry Signage on the Highway

Although these signs attract attention, the consultants consider the slogan, '*Hospitality Hub of the Highlands*' does not do justice to Capella and the Shire. The graphics are good and have visual impact, but with the high quality facilities available, a more appropriate slogan would be '*Cultural and Event Centre of the Highlands*'.

2) Aquatic Centre

Currently the Aquatic Centre has no presence from the highway. A large, easy-to-read sign is needed on the highway approaches to Capella, or if this cannot be done, a large sign (bright yellow background to attract attention) on the wall of the Aquatic Centre fronting the highway.

3) Cultural Centre

Although the Cultural Centre has a sign adjacent to the highway, this has little visual impact. Again, the need exists for a much larger sign that includes wording such as, '*available for conferences, meetings and functions*', and is aligned to the highway.

4) Parking Area Information Board

A large information board installed in the town parking area would be a distinct advantage.

This information board should have two large panels; one with a Shire road map showing the Tourist Drives, and the other should be a town map showing the location of features of interest including:

- Pioneer Village;
 - Aquatic Centre;
 - Cultural Centre;
 - Covered Arena;
 - Motels and Caravan Park; and
 - Nature Trail.
-

RECOMMENDATIONS

- 1) *Establish prominent entry statements on the northern and southern approaches to Capella.*
- 2) *Continue to implement the Urban Landscape Masterplan and Nature Walk projects.*
- 3) *Change the slogan on the highway entry signage to 'Cultural and Event Centre of the Highlands'.*
- 4) *Install new signage adjacent to the highway for the Aquatic and Cultural Centres and a shire/tourism information board in the parking area.*

6.8 THE NEED TO HIGHLIGHT CAPELLA PIONEER VILLAGE

The Capella Pioneer Village occupies a large parcel of land adjacent to the railway line immediately opposite the commercial area of Capella. The Village is the primary tourism asset within the Shire, with other facilities such as the Cultural Centre, Aquatic Centre and Covered Arena focusing on culture, events and recreation.

The Village is like many others in Queensland in that it serves to preserve and display the history of the area for locals and at the same time trying to attract visitors from outside the district. In many cases what is of interest to local families because of their links to a museum or collection, holds considerably less interest to visitors, unless there is a really strong story that can be told that broadens the appeal of the attraction.

The type of material collected and its display also impacts on the appeal of museums and historical villages to visitors. Those attractions that have focused collection policies and display their collection in an orderly manner with relevant interpretation have a better chance of integration with the tourism industry and therefore appeal to visitors.

The Capella Pioneer Village has a focused collections policy, well presented and informative interpretation and interesting stories to tell, which sets it apart from many generalist museums that are found throughout rural Australia. The key stories that the Village sets out to interpret are broadly:

- Settlement of the area interpreted through the Peak Downs Homestead, Gordon Downs Store, and steam machinery used to develop the land;
- The 1891 Shearers' Strike interpreted through the Gordon Downs Woolshed;
- The railways impact on development of the town interpreted through rolling stock and railway buildings and equipment; and
- Broad-scale farming development interpreted through the Queensland-British Food Corporation, and machinery used for farming.

The stories are relevant to the district and of interest to visitors. The Village has a unique story to tell about the agricultural development of the region through the operations of the Queensland British Food Corporation, which paved the way for broad scale agricultural development of the Central Highlands. More could be made of this from a tourism perspective, as this is a little-known part of Queensland's agricultural history.

If the development of agricultural tourism is undertaken as recommended elsewhere in this report, then the Village, using the Queensland British Food Corporation story, could easily interpret the historical aspect of large-scale farming and land development within Peak Downs Shire.

There may be opportunity to strengthen Pioneer Village product with the inclusion of an Agricultural Heritage Interpretive Centre with interactive displays and 3D models. However, in review of current visitor numbers and volunteer constraints, a feasibility study would be required to determine potential and costs.

Compared to other museums in Central Queensland, the Village has a relatively low visitation rate despite the attractiveness of its setting and the stories it tells. One possible reason for this is the location of the Village behind the railway line. The landscaping between the Highway/railway reserve and the Village creates a visual barrier, particularly to Highway traffic from the south. Further, the orientation of the Village with the main entrance on its western boundary, shielded to the Highway by the Peak Downs Homestead, gives the impression that it is permanently closed.

Additional signage to the Village from the town and information about it in the town could encourage visitation. The installation of banners which are displayed at the Village when it is open, would assist in directing people from the Highway to the Village. The wheat silo, being the most visible structure in Capella, may be a potential signage location.

What is currently in need of attention is the promotion of the Village, its stories and to provide access to the Village during the peak visitor season, which is primarily the period from June through to September. Staffing of the Village has been identified as an issue, but there are no easy solutions to obtain more volunteers to operate the Village.

Consistency of opening times rather than extended hours is the key to attracting visitors. With a strong story and definite opening times that relate to visitor movement patterns, the Village can be promoted to visitors.

Cross-promotion of the Village with other attractions in the town, i.e. the Aquatic Centre, Cultural Centre and Covered Arena, could provide more visitors to the Village, if those assets were also better promoted to visitors to the Central Highlands and Capella.

Developing opportunities such as special openings for conference delegates attending the Cultural Centre venue or conferences held in Emerald or group/schools attending events at the Aquatic Centre and Cultural Centre, could also be a way to increase visitation and revenue.

Linking with the Blair Athol Mine tours is considered to be a priority to expose the Village to more visitors who are passing through the town.

The Visitor Information Centre at Emerald has a key role to play in this and the general promotion of the Capella area and Central Highlands. The continuing support provided by the visitor information service at the town's newsagency is also required to promote the Village.

More visitation to the Village though the tourist season should be possible with better signage, and linkages with other attractions in the town and region, particularly the coal mine interpretive trail recommended elsewhere in this report.

The museums of Central Queensland have access to a Museum Development Officer based in Rockhampton as part of a Queensland Museum initiative to offer professional assistance to museums in regional areas of the State.

Museums can ask for assistance in areas such as collection management and restoration of artefacts as well as issues covering operational matters such as succession planning.

RECOMMENDATIONS

- 1) *That the Capella Pioneer Village seeks out opportunities to work with other attractions in Capella and the Central Highlands for cross-promotion and the development of new activities at the Village, and that better signage directing visitors to the Village is implemented.*
- 2) *That the feasibility of an Agricultural Heritage Interpretive Centre as part of the Pioneer Village is investigated to determine potential and costs.*

6.9 THE NEED TO COMPLETE THE SEALING OF THE CAPELLA-RUBY VALE ROAD

It is understood that only one section of the road remains unsealed in Peak Downs Shire. It can be assumed that the unsealed section would be a deterrent to some visitors wishing to travel this route, particularly those in cars rather than 4WDs.

RECOMMENDATION

Complete the unsealed section of the Capella-Rubyvale road, as soon as possible.

6.10 THE NEED TO UPGRADE FACILITIES AT THE LILYVALE WATERHOLE

This is an interesting site and one of the features of the No. 3 self-drive tour in Peak Downs Shire. However, work is required to install proper picnic tables and seats and interpretive information.

Also, at the time of inspection, there was litter scattered on the lower level adjacent to the waterhole, and if visitors are to be encouraged to see this site, regular rubbish collection will be needed.

It is understood that Lilyvale Waterhole is on mining company land, which may impose constraints on the upgrading process. It is also understood that a memorial with the names of those interred at Lilyvale Cemetery is to be built on the road reserve rather than the site of the old cemetery.

While the old cemetery goes under water in times of flood, the consultants question the road reserve site because of the importance of heritage authenticity.

RECOMMENDATION

Seek co-operation from the mining company to upgrade facilities at Lilyvale Waterhole.

6.11 THE NEED TO BUILD THE SPECIAL-EVENT SECTOR

Events are an effective way of attracting visitors, and the Central Highlands has operated a number of successful, long-running events. The study had identified two issues that need to be addressed:

- 1) At present there are several different Central Highlands event calendars, i.e. Major Events list, Community Events list, Events Calendar produced by Capricorn Tourism and a comprehensive calendar four years out of date, on the website <http://members.tripod.com/centralhighlands/events/htm>. This out-of-date calendar should be removed from the Internet as soon as possible.

Efforts should be made to concentrate on one, comprehensive, up-to-date event calendar for the Central Highlands.

- 2) Comments made during consultation suggest there is little communication between the event organising bodies. Consequently, problems occur with clashing of event dates and availability of volunteers, particularly at a localised level.

The most appropriate way forward for the Central Highlands event sector is to continue to develop the existing main events.

To improve communication in the event sector the need exists for a Central Highlands Special-Event Forum held each year to bring committee representatives together, identify common problems and possible solutions, and to facilitate networking.

RECOMMENDATIONS

- 1) *Rationalise event calendars to have one comprehensive, up-to-date events calendar for the Central Highlands.*
- 2) *Arrange an annual Central Highlands Special Events forum to facilitate improved communication and networking between event organisers.*

6.12 THE NEED TO ADDRESS FREE OVERNIGHT STOPOVERS BY MOTORHOMES AND CARAVANS

This contentious issue was raised several times during the consultation process and it is apparent there is strong, divided opinion as to whether free overnight stopovers should be permitted.

At present insufficient valid data is available to enable Councils and communities to make informed decisions whether to allow or stop this practice.

Communities are concerned that if free overnight parking is stopped, businesses will suffer. This problem appears to be exacerbated by reports that some caravans and motorhomes have apparently stated that towns that stop free overnights will be bypassed by the caravan/motorhome sector.

The consultants have conducted preliminary research on this issue and from the limited information currently available, three factors have emerged:

- 1) It is an Australia-wide problem;
- 2) Expenditure by free overnights appears to be considerably less than those staying in caravan parks; and
- 3) On the basis of anecdotal evidence, some claims of expenditure by this sector of caravans and motorhomes cannot be substantiated and appear to be excessive.

Because of the limited amount of data available on this subject the priority need exists for a research program across the Central Highlands to determine the economic benefit and costs derived from allowing free overnight parking. This research should be a pilot program which could be applied in other regions, and grant funding should be sought for this project.

Advice should be sought from Tourism Queensland's Research Division on an appropriate budget for this study.

From discussions with the Executive Officer of the Caravan Industry Association, the Association is strongly against allowing free overnight parking, and is supportive of the above research program.

RECOMMENDATION

Seek grant funding for a pilot research program across the Central Highlands to determine the level of economic benefit and costs derived from free overnight stopovers.

6.13 OPPORTUNITY FOR INTERPRETATION OF THE COAL INDUSTRY

Interpretation of the coal industry is a major opportunity for tourism development within the Emerald and Peak Downs Shires, particularly if the interpretation covers all the aspects of the coal industry, that is, mining, rail transport and loading on to shipping for export.

Obviously not all these processes occur within either Emerald or Peak Downs Shires but each has a role to play as part of a co-ordinated approach to developing a new, educative and distinctly Central Queensland industrial tourism experience.

Staff at the Visitor Information Centre at Emerald regularly have success in altering the travel itineraries of many visitors, who on being informed of the free Blair Athol Mine tours, travel to Clermont to see the coal industry first hand, at the region's only coal mine that allows controlled public access.

Some of these visitors stay an extra day in the Emerald/Peak Downs Shires as a direct result of varying their travel plans to accommodate the Blair Athol Mine tours. While access to the mine to see mining operations is a significant opportunity for visitors, other opportunities exist that are currently not exploited.

The scale of operations, differing mining methods, logistics of transporting coal and the delivery to ships of particular grades and types of coal to meet specific customers' orders, could be easily interpreted across not only the Emerald and Peak Downs Shires, but also adjacent Shires that house significant mines and rail and port infrastructure.

The coal industry infrastructure is spread from mines within Peak Downs Shire through Belyando and Broadsound Shires across to the Mackay/ Sarina area with the Hay Point Coal Loading Terminal.

There is potential to create a very interesting attraction for visitors and to convert coastal road traffic from Mackay and Sarina past Coppabella and through the mining areas of Moranbah, Clermont, Dysart, and through Capella and Emerald.

From discussions held with the CEO of Belyando Shire the consultants have learned that Peak Downs Mine is planning a display in the information centre in the Council Offices at Moranbah. Further, Peak Downs Mine may be introducing tours.

The existing Blair Athol Mine tour is a key component of any coal interpretive trail. Access to mines, while desirable from a visitor's perspective, is in many cases incompatible with mine safety issues.

However, development of interpretive material and safe viewing locations external to mine sites, could be a means to tell the story and give an appreciation of the immense scale and complexity of the coal industry, to a public that does not come into contact with these features on a daily basis.

Anecdotal evidence from VIC staff and the operators of the Blair Athol Mine tours indicates that the coal industry is of interest to many visitors and that word of mouth is currently the primary means of promotion. Reaction to the mine tours is very positive and the experience beyond expectations in terms of the magnitude of the operations of the coal industry.

The story of the delivery of coal to Hay Point by Queensland Railways and the logistics of train transport of the various coal types for specific orders is not generally known. The size of the operation is also unknown to many people. Opportunities exist to tap into the wealth of knowledge of retired mine, train and port personnel that will create a truly unique and valuable tourism product and experience.

Being a travel decision point at the intersection of two major highways, Emerald has a significant role to play in the interpretation of coal, and the VIC at Emerald could be the venue for broad-scale interpretive displays.

The fact that the operations stretch over such an expanse of country, means benefits are shared and the established drive tourism market that Emerald and Peak Downs Shires and Central Queensland tourism market relies upon, gains a reason to stay and travel across the region.

This project offers benefits to all areas that it traverses from Blackwater to Emerald to Clermont to Moranbah to Mackay, and as a result, needs input from Central Queensland's two Regional Tourist Organisations, Capricorn Tourism and Mackay Tourism, to co-ordinate marketing activities.

RECOMMENDATION

That a cross-regional group is formed to work with the coal industry, Queensland Rail and the operators of the Hay Point coal loading facility to develop a co-ordinated coal industry interpretive trail.

6.14 PILOT PROGRAM FOR YOUTH INVOLVEMENT IN TOURISM

In the development of tourism throughout Australia, one sector that invariably tends to be overlooked in terms of participation is the youth of the community, whereas, young people have much to offer in ideas, energy, enthusiasm and talent, and, given the opportunity, can make a significant contribution.

It is suggested that a pilot program for youth involvement in tourism is established jointly by stakeholder organisations, the TAFE College and high school in partnership, to provide a mechanism for input and participation by young people in the region.

PROGRAM OUTLINE

Primary Objectives

The primary objectives of the program would be:

- 1) To enable students studying tourism to obtain a greater understanding of the industry;
- 2) To enable young people to have direct input into development of the tourism industry in the local areas and the region;
- 3) To enable young people to become better prepared to gain employment and broaden their horizons;
- 4) To assist students who wish to enter a career in tourism to make career path decisions; and
- 5) To create benefits for the community.

Program Establishment Options

As an initial basis for further consideration, options for the establishment of this program would be:

- To establish a youth or junior tourism association in its own right, facilitated and guided jointly by the participating partnership.
- To establish a youth tourism committee as part of an existing committee structure.
- To establish the proposed organisation as a special sub-committee of an established youth organisation in the area.
- The most appropriate groups would be students in Grades 10, 11 and 12, those attending TAFE courses, and young people of similar ages who are currently unemployed. However, age and other parameters should be decided by the facilitating bodies.

Role of the Proposed Organisation

It is envisaged that the main role of this youth organisation would be:

- To generate input and ideas for product development and marketing from the viewpoint of the younger generation;
 - To reinforce tourism subjects at educational institutions;
 - To assist tourism organisations in industry development and marketing; and
 - To participate where possible in promotional activities.
-

While most young people of secondary school age have time constraints during weekdays, they can become involved during weekends and holiday periods.

Ways Young People Can Become Involved

There are a number of ways in which young people can become actively involved through the program:

- Involvement in developing local tourism plans.
- Assistance with keeping product inventories up-to-date.
- Assistance with local distribution of promotional material.
- Conducting visitor surveys and other research.
- Volunteer services for visitor information centres.
- Assistance in maintaining communication with the community and tourism and business operators on behalf of the VIC and local tourism committee.
- Assistance in the planning, management and marketing of special events.

Training Needs and Opportunities

As an integral part of the program and to assist young people who wish to become involved, there would be the need to provide specialised training in the form of short courses in such subject areas as:

- Product knowledge;
- Interpersonal skills;
- Customer service;
- Operation of voluntary organisations and meeting procedures;
- Public speaking; and
- The role of the different sectors of the tourism and travel industries.

Benefits of the Program

The advantages of this program for young people would include:

- A meaningful contribution to community/tourism development.
 - Gaining an understanding of how the tourism industry works.
 - Practical 'hands on' training in various aspects of local and regional tourism.
 - Development of interpersonal skills.
 - Training and experience in meeting procedures and the role of tourism associations.
 - Gaining an understanding of the importance of customer service and creating customer satisfaction.
 - Self-development and pride in achievement.
 - Development of a pool of young people with the skills and knowledge to assist them to gain employment as the region's tourism industry develops.
-

The Establishment Process

The introduction and success of this program will depend on the level of interest from youth in the region, therefore, it is suggested that the next stages would be:

- to arrange and publicise the proposed program at a meeting to gauge the level of interest, and if sufficient interest is evident . . .
- to form a Steering Committee comprising representatives of Council, high school, TAFE and youth groups to establish the organisation, its objectives, operating procedures and organisational links.

With both the State and Federal Governments focusing on training and employment, grant funding should be sought for the establishment of this pilot program and for the required training.

RECOMMENDATION

Investigate the establishment of this pilot program for youth involvement in tourism, as a medium-term initiative.

6.15 THE OPPORTUNITY TO ESTABLISH GEOCACHING

Geocaching is an emerging product development/visitor activity opportunity that is rapidly becoming popular overseas and has only recently been introduced in Australia.

Geocaching is a term used to describe a high tech 'treasure hunt' based on the use of hand held Global Positioning System (GPS) equipment, which is now accurate to within approximately six metres, and is an activity that could be established at low cost by local tourism organisations in their respective Shires.

The 'cache' comprises a compact weatherproof container with a visitors' book together with several small, low-cost items such as promotional key rings, fridge magnets, small toys and other souvenir items. The caches are then placed in particular locations and the GPS co-ordinates are publicised.

Visitors undertaking this activity then have the task of finding these caches using GPS units. As each cache is found, geocaching protocol requires finders to sign the visitors' book and if they wish, to take any of the cache items, replacing them with similar items. Because devotees treat this activity hobby seriously, cache items are usually replaced.

Caches can be placed in various locations with differing levels of access difficulty, rated 1 – 5, with a rating of 1 being the easiest. A rating of 5 would usually require special equipment such as rock-climbing gear to access.

Geocaching can be publicised with low-cost brochures giving a general indication of the area and the GPS co-ordinates, or a special regional website giving the same information.

The Central Highlands, with its high level of fossicking opportunities, is ideally suited for the introduction of geocaching as a new, innovative product. As yet, few if any regions are aware of this opportunity, consequently, the Central Highlands has the potential to capitalise on becoming a leader in developing this visitor activity.

The introduction of geocaching in the region would create four main benefits:

- 1) Caches can be positioned in locations with different levels of access to cater for various segments of the market such as:
 - ☛ Families;
 - ☛ Bushwalkers;
 - ☛ Off-road recreation;
 - ☛ Adventure seekers; and
 - ☛ School groups.
- 2) Encouragement of dispersal of visitors around the Central Highlands.
- 3) Year-round leisure activity opportunity.
- 4) Caches can be established at low cost by local tourism organisations. Costs for each cache are usually around \$20 - \$30.

To gain maximum benefit, geocaching should be implemented on a whole-of-region basis.

The resources needed to establish this activity are the caches, time to position them, and a GPS unit to establish the co-ordinates.

GPS units are becoming widely used by various sectors, and a unit can usually be borrowed to enable geocaching product to be established.

Promotion of this activity is through normal visitor information distribution channels and websites. This initiative is one that could be initially established within six months, and the number of caches can then be increased over time.

If it is decided to implement this project it would be advisable for Central Highlands Tourism to register a special website www.chtgeocaching.com.au or similar title.

RECOMMENDATION

Consider developing and progressively introducing geocaching product throughout the region.

6.16 OPPORTUNITY FOR PRODUCT PACKAGING

There is an opportunity over time to develop co-ordinated packaging of products across the region. Given the small-scale nature of the majority of the region's tourism businesses and the resultant limited ability to make an impact as individual businesses, it is essential for operators to work together to provide the product that the area can produce using existing assets and delivering a product that visitors want.

The economies of scale in relation to marketing costs and also the ability to raise the profile of individual businesses through development of joint packages are key advantages from the operators' perspective, while the development of new, innovative and interesting product reflecting the region's attributes are advantages from the consumer's perspective.

The region's operators must be aware of what the market wants. They must also know other operators' products that are compatible with their own.

If packages are developed in accordance with market needs and promoted through key information centres, the Internet, Capricorn Tourism and Tourism Queensland, then the likelihood of success in the market is significantly enhanced.

Across the region opportunities can be created for themed special-interest packaging. The catalyst needed for this is the willingness and understanding of operators to participate and the desire to produce interesting joint product combining attractions, services and accommodation.

Development of tour packages for bus operators and their client groups can also increase the prominence of the area within source markets, subject to the availability of bulk accommodation.

The definition of packaging is the combining of two or more facilities/services/attractions as a single unit for sale to visitors to an area. The overall aim of any packaging is to produce an integrated, interesting product to encourage visitors to stay two or three days within the region. For packages to be developed the following must occur:

- Operators must be willing to work together and decide they will jointly sell and market a combined product;
 - Operators need to gain knowledge of what constitutes packaging, how to go about it, and the responsibilities involved as a partner in a packaging exercise;
 - Services/attractions offered have to be bought, i.e. the components of the package are not provided free-of-charge and therefore a commission to a travel agent, tour wholesaler or other retailing intermediary must be allowed in the costing;
 - The packages developed must have commercial appeal because they must meet the interest, demands and expectations of potential visitors; and
 - Accommodation is an essential component, and should be incorporated in packages to ensure extended visitation to an area, higher yield, and greater economic benefit.
-

At present, tourism activity in the Central Highlands centres on itinerary planning, i.e. tourist drives.

Packaging differs from itinerary planning because with itinerary planning non-commissionable attractions and products are promoted to encourage visitation, but the components are not necessarily available for purchase or the supply is not formalised between the suppliers.

However, packaging is a time-consuming exercise and considerable groundwork will be required. To ensure commercial and industry acceptance, the following process will need to be implemented before packages can be established as an integral part of the region's tourism industry:

- 1) A workshop for Central Highlands operators to create understanding of packaging, commission structures and distribution systems;
- 2) Identification of those operators who are willing to participate, and most importantly, have product which meets and can maintain the required standard of service and professionalism;
- 3) Negotiation with operators to establish component pricing and obtaining a commitment to maintain these prices for the package validity duration;
- 4) Package itinerary/activity development; and
- 5) Package pricing.

In conducting this initial process for package development, assistance should be sought from Capricorn Tourism, and through this organisation, Tourism Queensland.

RECOMMENDATION

Arrange a packaging workshop for Central Highlands Tourism and tourism-related operators to gauge interest in participation and explain the package development process.

6.17 THE NEED TO UPSKILL OPERATORS

The training of tourism operators is a difficult issue in which to match the stated needs and aspirations of tourism operators, with the realities surrounding the time constraints in attending training courses. The results of consultation and independent studies undertaken during the past two years are consistent in the following respects:

- Most tourism operators acknowledge the need to update their existing skills and gain new skills through training;
- Operators are less inclined towards formalised, structured and time-consuming courses that result in academic qualifications. Instead, they express a desire to obtain short, focused, action-orientated training;

- Many operators have great difficulty in balancing the demands of a seven-days-a-week tourism business, with the time commitment required for attending formalised classes; and
- The preference is for practical, subject-specific, intensive workshop format training requiring only a half or one-day time commitment, but with maximum 'how to' information.

In assessing the primary training needs for tourism operators, short, practical workshops are needed in the following subject areas:

- 1) Understanding the industry;
- 2) Industry trends and emerging markets;
- 3) Customer service including telephone techniques;
- 4) Marketing;
- 5) Packaging;
- 6) Australian Tourism Data Warehouse opportunities;
- 7) Product presentation at consumer shows;
- 8) Sector-specific, e.g. development and operation of host farms and B&Bs; and
- 9) Organising special events.

RECOMMENDATION

Facilitate the introduction of appropriate, short training programs in association with TAFE, Capricorn Tourism and Tourism Queensland.



7.0 MARKET DEVELOPMENT

The consultants have avoided restating a detailed market analysis for the Capricorn Region, as this tends to be biased towards the higher density coastal population centres. However, surveys conducted by Tourism Queensland at the Gemfields in July 2002 and at the Gemfields and Emerald in April 2003, give an indicative visitor profile and comparisons between the two survey periods:

- In April 2003 (early in the tourist season), almost two-thirds of respondents were from Queensland, whereas in July 2002, the peak season, approximately two-thirds of representatives were from interstate. Overseas visitors accounted for 10%-12%.
 - The most predominant visitor age group was 55+, with two-thirds of respondents in this age group in July 2002 compared with 47% in April 2003. Anecdotal evidence suggests that the lower percentage in 2003 may have been largely due to the poor superannuation and investment returns in that year for people on fixed incomes.
 - Most respondents were older working couples or retirees. In July 2002 these travellers accounted for 53%, whereas in April 2003 this age group accounted for only 30%. Again, this tends to confirm the constraints on travel experienced by those on fixed incomes.
 - Most respondents (approximately 60%) were first-time visitors to Emerald and the Gemfields.
 - Approximately three-quarters of respondents spent time at Emerald and Rubyvale, with 51% spending time at Sapphire (2003), and 37% at Anakie (2003), highlighting the importance of the Gemfields as a major attraction and of Emerald as the gateway to the Gemfields.
 - In 2003, 89% of respondents visited for holiday/leisure purposes, similar proportions to 2002.
 - Two-thirds of respondents stayed in caravans, cabins or tents.
 - The majority travelled by their own vehicle with one-quarter using motorhomes and campervans. Usage of motorhomes and campervans increased by 14% in April 2003 over the 2002 survey period, and indicates the growing popularity of the motorhome and campervan sectors.
 - Coach and rail travel was very low at 1%-2%.
 - The most popular activities were fossicking and visiting a gem gallery. Visiting Lake Maraboon and the Botanical Gardens were also popular.
 - Apart from visiting the Gemfields, one of the appealing aspects was the friendliness of local people.
 - Approximately 40% of respondents stated that their visit had exceeded expectations.
-

- Improvements suggested by respondents were:
 - ☛ Improved roads;
 - ☛ More tourism product;
 - ☛ Better public facilities and amenities;
 - ☛ More tourism information/promotion;
 - ☛ More/better camping facilities;
 - ☛ More/updated caravan parks;
 - ☛ Improved signage; and
 - ☛ More rest stops for motorists.

7.1 THE DRIVE MARKET

THE DOMESTIC DRIVE MARKET IN AUSTRALIA

- There were 48.0 million domestic drive market visitors in Australia in the year ended June 2003, representing 64% of the total domestic visitors in Australia.
- Following a consistent decline between the year ending June 2000 and the year ending December 2001, domestic drive market visitor nights spent in Australia have shown continued growth since the year ending June 2002.
- The total trip expenditure by domestic drive market visitors in Australia amounted to \$19.3 billion in the year ended June 2003. Drive market trips accounted for 48% of the total trip expenditure by domestic visitors in Australia.

THE DOMESTIC DRIVE MARKET IN QUEENSLAND

- The number of domestic drive market visitors to Queensland increased from 9.6 million in the year ended June 2000 to 10.2 million in the year ended June 2003, an average annual growth rate of 2.2%.
 - The average length of stay of drive market visitors in Queensland fell slightly, from 4.3 nights in the year ended June 2000, to 4.2 nights in the year ended June 2003.
 - Drive market visitors represented 62% of the total domestic visitors to Queensland in the year ended June 2003.
 - The overall increase in the number of drive market visitors to Queensland between the year ended June 2000 and the year ended June 2003 was primarily driven by increases in the number of longer tour (8-21 nights) and shorter tour (4-7 nights) visitors over this period (average annual growth rates of 6.1% and 3.6% respectively).
 - The longer tour market (8-21 nights) accounted for the largest proportion (34%) of the total drive visitor nights spent in Queensland in the year ended June 2003.
 - Intrastate visitors also accounted for a large proportion of the 8-21 night and 22+ night segments in the year ended June 2003 (45% and 29% respectively).
-

THE INTERNATIONAL DRIVE MARKET IN AUSTRALIA

- Over the three years to June 2003, visitors from New Zealand showed the largest increase in drive market visitation to Australia (average annual growth rate of 10.1%). Drive market visitation to Australia from the UK and Malaysia also increased during this period (average annual growth rates of 2.1% and 0.3% respectively).

THE INTERNATIONAL DRIVE MARKET IN QUEENSLAND

- In the year ended June 2003, there were 302,802 international drive visitors to Queensland, representing 38% of the total international drive visitors to Australia.
- The largest international source markets for drive visitors to Queensland were New Zealand (25%), the United Kingdom (24%), Europe (excluding the UK and Germany (17%), Germany (9%), and the USA (7%).
- Forty-five percent (45%) of the international drive market visitors to Queensland were travelling as an adult couple in the year ending June 2003. Unaccompanied travellers accounted for a further 32%.
- Those who take driving holidays, particularly longer holidays, express a preference for 'real experiences' and 'local information', as they are motivated by the need to see something new and do interesting things.

7.2 THE IMPORTANCE OF CO-OPERATIVE MARKETING

Like many regional areas the Central Highlands tourism industry mainly comprises smaller operators with limited funds for marketing.

Experience over many years has shown that if an area such as the Central Highlands is to achieve success in promotion, co-operative marketing by operators is an essential element.

By pooling marketing dollars in promotional activities, thereby gaining economies of scale and creating a synergistic effect, the marketing efforts will have far greater impact in the fiercely competitive industry of today. Opportunities regularly occur for operators to participate in co-operative marketing programs through Capricorn Tourism and Tourism Queensland.

Operators need to adapt to the concept of working co-operatively. Potential joint referral or product development opportunities may exist whereby operators in both coastal and hinterland areas need to work together for their mutual benefit.

The importance of a co-operative approach by tourism stakeholders in the Central Highlands cannot be over-emphasised.

The introduction of 'how to' workshops on this subject and other aspects of the industry outlined earlier as part of the Action Plan implementation process will assist operators to expand their knowledge of product development and marketing, and gain a greater understanding of the co-operative opportunities available.

The CHT needs to actively encourage Councils and operators to participate in appropriate co-operative marketing campaigns and activities.

From time to time industry sector groups invariably endeavour to undertake external (out-of-region) promotional campaigns. It has been proven that in most cases these ad hoc efforts are inadequately funded, and have little if any long-term impact in the marketplace. It is also essential that stakeholders only support regional marketing activities initiated by the CHT or Capricorn Tourism.

RECOMMENDATION

Actively encourage a co-operative marketing approach by tourism stakeholders.

7.3 THE NEED FOR A CENTRAL HIGHLANDS TOURING MAP

Various maps are available for part of the Central Highlands, nevertheless, the need exists for a detailed map of the Central Highlands sub-region. This type of map should be A3 size with the map on one side and maps of each main town on the reverse, produced in 2-4 colours and in a large quantity in pads, distributed through VICs, accommodation, attractions, service stations and any other high visitor volume outlets.

An excellent example is the sub-regional map of the South Burnett in South-East Queensland. This map (sample supplied to CHT) was produced approximately two years ago and has proved to be very popular with visitors.

Consideration should be given to incorporating the information currently contained in the A4 flyer 'Way to Go' in the regional map.

Sponsorship should be sought to help defray production costs, However, the map should not be 'loaded' with advertisements.

This map should replace some of the smaller A4 maps produced in local areas.

RECOMMENDATION

Produce an A3 size touring map of the Central Highlands sub-region.

7.4 MARKETING ISSUES

Although understandably the CHT and Councils wish to promote the Central Highlands and their respective local government areas, experience clearly shows that it is pointless for any sub-regional area Council or community to attempt to 'go it alone' in promotion, given the level of competition for market share across the nation.

The Central Highlands is no exception. There is simply not enough promotional funding available to have meaningful and sustained impact in the visitor market.

For this reason the CHT should conduct **all** out-of-area promotional activities in co-operation with Capricorn Tourism. In this way maximum cost benefit and impact can be obtained, and the way is opened for co-operative opportunities with Tourism Queensland.

In conducting the consultation with Tourism Queensland and Capricorn Tourism representatives, the main message was that Central Highland stakeholders need to concentrate on product development, as new and expanded product is the priority need for the area to facilitate tourism growth.

The need for this approach was confirmed from the fieldwork, consultation and research conducted by the consultants for this study.

Because of resource constraints, no changes are recommended to the promotional activities of the CHT relative to existing target markets.

In the long term however, and subject to sufficient resources being available, there is potential to consider targeting the following three niche markets, in addition to the recreational fishing market:

1) Aviation Tourism

Emerald Airport provides opportunity to develop aviation tourism in the Central Highlands as a destination for pilots touring in light aircraft.

It is estimated that there are over 22,000 licensed pilots in Australia and many undertake recreational flying and touring with friends to regional destinations, particularly by pilots building flying hours and experience to gain a commercial licence. Also, some aero clubs regularly arrange visits to different destinations.

Emerald Airport offers potential to tap into the aviation recreational and touring markets by the development of short itineraries and packaging. Generally, this is a higher-yield market, and one way to publicise the Central Highlands in this regard is through the Aircraft Owners & Pilots Association which publishes a regular journal for members nationwide.

2) Sports Tourism

The Central Highlands has many sporting facilities and sports organisations. By working with facility owners/managers and representatives of sporting organisations, there would be potential for organised sporting events to be developed during times when the facilities are not normally used.

The area's golf courses are potential venues for packaging tours. As an example, in one region a golf club and a local motel operator have joined forces to develop golfing packages.

3) Conferences

Opportunity exists to promote both shires as venues for conferences. Capella has the venue for large conferences, with Emerald providing the major part of the accommodation requirement.

Emerald has smaller capacity venues and accordingly, can target smaller conferences.

By conducting joint promotions targeting this sector, both shires can gain benefit.

RECOMMENDATION

Progressively target the aviation tourism, sports and conference niche markets as resources permit.



ACTION PLAN

8.0 ACTION PLAN

This section comprises the core of the Tourism Development Plan and establishes the foundation and direction for sustainable future long-term tourism growth. The plan has been primarily designed to cover the 3-5 year period 2004 – 2009.

It is important for all stakeholders to adopt a vision statement and primary goals as the basis for future sustainable development of the tourism industry. The suggested Vision and Goals are as follows:

8.1 THE TOURISM VISION

By the year 2009, Emerald and Peak Downs Shires will be collectively recognised as the heartland destination areas of the Central Highlands by providing a range of high quality experiences for mainstream, domestic and international and special-interest markets.

8.2 GOALS

1) Leadership Goal

To provide strong leadership and clear direction for tourism growth.

2) Industry Goal

To encourage co-operation, excellence in service standards, and high-quality tourism products and facilities.

3) Consumer Goal

To recognise the needs and aspirations of visitors, ensure that these expectations are satisfied, and marketing promises delivered.

4) Marketing Goal

To increase visitor numbers, length of stay and visitor spending by working with Capricorn Tourism and Tourism Queensland to raise the profile of the Shires and the attractions they offer.

To ensure a clear path is established for future industry development, the Action Plan contained in the following pages builds on the Vision and broad Goals, and is aimed at focusing the efforts of all stakeholders. The Action Plan brings together the recommendations included in the body of the report under a series of Strategic Objectives, together with suggested timing, organisational responsibility, and alliances.

The Plan provides for an integrated approach and it is essential that recommendations are implemented in a systematic manner as resources become available.

While this section is a blueprint for action, most importantly, time must be allowed for the recommendations to be implemented and for the results to become evident.

Also, the consultants are of the opinion that a key factor in the implementation of this Tourism Industry Development Plan will be the appointment of a Tourism Project Officer.

To give this Plan life and momentum, the goodwill and co-operation of all stakeholders will be a mandatory element. The vision can be realised over time, but this can only happen with steady application and firm commitment.

Note: Recommendations in the following pages of the Action Plan are given in suggested order of priority. This sequence differs from the recommendation sequence in the body of the report which broadly groups the recommendations in subject areas rather than timing.

8.3 IMPLEMENTATION

An essential part of the implementation process will involve monitoring progress on at least a quarterly basis to ensure the overall plan is on-track to achieving the objectives.

In formulating this Action Plan, the consultancy team recognises that there may be human resource and financial constraints on the implementation of the recommendations in accordance with the suggested timing and organisational responsibility. However, the key issue will be to steadily implement the recommendations as resources permit.

It is equally important that strategies are reviewed at regular intervals so they can be adjusted if necessary in accordance with external influences which may arise, such as changes in the national economy or the visitor market, or in state/federal tourism policies. Nevertheless, it must be kept in mind that constant changes or an ad hoc approach will invariably lead to confusion, loss of direction, and waste of resources.

8.4 EXPECTED OUTCOMES

The expected primary outcomes of the Action Plan are:

- Higher levels of domestic and international visitors;
 - Extended length of stay;
 - Higher yield;
 - High level of visitor satisfaction;
 - Increased co-operation, networking and product co-ordination within the industry across the Central Highlands; and
 - Increased economic, employment and other benefits over time for both Emerald and Peak Downs Shires.
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8.5 PERFORMANCE INDICATORS

The following indicators should be monitored on an annual basis to evaluate performance of the region's tourism industry:

- Visitor information centre enquiries;
- Visitor numbers at attractions;
- Accommodation occupancy rates;
- Tourism-generated employment;
- Economic activity generated by tourism;
- New private sector development;
- Upgrading of existing tourism facilities;
- Visitor satisfaction levels; and
- Level of community support.

Given the limited resources available, detailed analysis of performance indicators will not be possible. Nevertheless, basic information and surveys, together with observation, can give a clear indication of industry performance.

ACTION PLAN SUMMARY

STRATEGIC OBJECTIVE 1

To strengthen industry leadership, and improve communication and co-ordination.

ACTION	Refer Section	Timing	Organisational Responsibility	Partnerships / Alliances	Resourcing
Local Government Tourism Policies: 1) Develop and adopt consistent local government core tourism policies across the Central Highlands.	5.1	Priority	Councils	CHT / CHDC	Councils
Central Highlands Tourism Organisation: 2) Consider reintroduction of the dual membership system based on a Memorandum of Understanding between Capricorn Tourism and Central Highlands Tourism.	5.4	For 2004/05	CHT	Capricorn Tourism	CHT Capricorn Tourism
Capricorn Tourism: 3) CHT and Capricorn Tourism to review existing lines of communication and seek ways they can be improved. 4) Encourage ongoing membership support for Capricorn Tourism.	5.5 " "	Priority Ongoing	CHT / Capricorn Tourism CHT	Capricorn Tourism Capricorn Tourism	CHT / Capricorn Tourism CHT / Capricorn Tourism
The Need for a Paid Tourism Project Officer: 5) Work towards employment of a Tourism Project Officer by mid 2005.	5.6	By June 2005	CHT	Councils / Capricorn Tourism / CHDC	<ul style="list-style-type: none"> · Grant Funding · Special Project Grants · Councils · Other Sponsorship

STRATEGIC OBJECTIVE 2

To upgrade and expand the Shire's tourism product.

ACTION	Refer Section	Timing	Organisational Responsibility	Partnerships / Alliances	Resourcing
<p>The Need for a new Visitor Information Centre (VIC):</p> <p>5) Pursue the establishment of the new Emerald Visitor Information Centre as a high priority requirement.</p>	6.1	Priority	Emerald Shire Council	<p>CHT</p> <p>Other Central Highland Councils</p>	Councils
<p>The Need to Upgrade the Sapphire Gemfields Experience:</p> <p>6) Undertake a clean-up program to remove rubbish, old car bodies and out-of-date signs from the Gemfields.</p> <p>7) Make representation to the Department of Natural Resources & Mines to address potential health hazards in main fossicking areas due to the lack of toilets.</p> <p>8) Form a Steering Committee to initiate the establishment of a Gemfields Operators' Co-operative (suggested title) to set appropriate standards of operation for members.</p> <p>9) Initiate the process to commission a Sapphire Gemfields Strategic Plan.</p>	6.2	Priority	Emerald Shire Council	Gemfields Operators	Emerald Shire Council
	" "	Priority	Council & Dept. Of Natural Resources (DNR)	Gemfields Operators	DNR
	" "	Priority	Gemfields Operators	CHT / CHDC	Gemfields Operators
	" "	2004	CHDC	Gemfields Stakeholders	Grant Funding

STRATEGIC OBJECTIVE 2 (Continued)

ACTION	Refer Section	Timing	Organisational Responsibility	Partnerships / Alliances	Resourcing
<p>The Need to Build the Special Events Sector:</p> <p>10) Rationalise event calendars to have one comprehensive, up-to-date events calendar for the Central Highlands.</p> <p>11) Arrange an annual Central Highlands Special Events forum to facilitate improved communication and networking between event organisers.</p>	<p>6.11</p> <p>“ ”</p>	<p>Priority</p> <p>Late 2004</p>	<p>CHT</p> <p>CHT</p>	<p>Event Organisers VICs</p> <p>Event Organisers Capricorn Tourism</p>	<p>CHT VICs</p> <p>CHT Low-cost Workshop Fee</p>
<p>Opportunity for Guided Tours of the Botanical Gardens:</p> <p>12) Investigate the feasibility of conducting guided tours through the Botanical Gardens.</p>	<p>6.6</p>	<p>2004</p>	<p>Emerald Shire Council CHT</p>	<p>CHT</p>	<p>Voluntary Tour Guides</p>
<p>The Need to Address Free Overnight Stopovers by Motorhomes & Caravans:</p> <p>13) Seek grant funding for a pilot research program across the Central Highlands to determine the level of economic benefit and costs derived from free overnight stopovers.</p>	<p>6.12</p>	<p>2004/05</p>	<p>CHT / CHDC</p>	<p>Councils Caravan Industry Assn. Tourism Qld.</p>	<p>Grant Funding</p>

STRATEGIC OBJECTIVE 2 (Continued)

ACTION	Refer Section	Timing	Organisational Responsibility	Partnerships / Alliances	Resourcing
<p>The Need to Create a High Profile for Capella:</p> <p>14) Establish prominent entry statements on the northern and southern approaches to Capella.</p> <p>15) Continue to implement the Urban Landscape Masterplan and Nature Walk projects.</p> <p>16) Change the slogan on the highway entry signage to '<i>Cultural & Event Centre of the Highlands</i>'.</p> <p>17) Install new signage adjacent to the highway for the Aquatic and Cultural Centres and a shire/tourism information board in the parking area.</p>	<p>6.7</p> <p>" "</p> <p>" "</p> <p>" "</p>	<p>2004/05</p> <p>As resources Permit</p> <p>2004/05</p> <p>2004/05</p>	<p>Peak Downs Council</p> <p>Council</p> <p>Council</p> <p>Council</p>	<p>Dept. of Main Roads</p> <p>Capella Community</p> <p>Dept. of Main Roads</p> <p>Aquatic & Cultural Centres</p>	<p>Council</p> <p>Council</p> <p>Council</p> <p>Council</p>
<p>The Need to Highlight Capella Pioneer Village:</p> <p>18) That the Capella Pioneer Village seeks out opportunities to work with other attractions in Capella and the Central Highlands for cross-promotion and the development of new activities at the Village, and that better signage directing visitors to the Village is implemented.</p>	<p>6.8</p>	<p>2004/05</p> <p>Ongoing</p>	<p>Management Committee</p>	<p>Council</p> <p>Clermont Museum</p> <p>CQ Museum</p> <p>Dev. Officer</p>	<p>Pioneer Village</p>

STRATEGIC OBJECTIVE 2 (Continued)

ACTION	Refer Section	Timing	Organisational Responsibility	Partnerships / Alliances	Resourcing
<p>Capella Pioneer Village (Continued):</p> <p>19) That the feasibility of an Agricultural Heritage Interpretive Centre as part of the Pioneer Village is investigated to determine potential and costs.</p>	6.8	2005	Management Committee	Council CQ Museum Dev. Officer	Grant Funding
<p>The Need to Complete the Sealing of the Capella-Rubyvale Road:</p> <p>20) Complete the unsealed section of the Capella-Rubyvale Road, as soon as Possible.</p>	6.9	Subject to Council Budget	Council	Gemfields	Council
<p>The Need to Upgrade Facilities at the Lilyvale Waterhole:</p> <p>21) Seek co-operation from the mining company to upgrade facilities at Lilyvale Waterhole.</p>	6.10	Subject to Mining Company	Council	Mining Company	Council
<p>Pilot Program for Youth Involvement in Tourism:</p> <p>22) Investigate the establishment of this pilot program for youth involvement in tourism, as a medium-term initiative.</p>	6.14	2005	CHDC Project Officer 'Tracks to the Future' Program	CHT High School TAFE	Project Funding

STRATEGIC OBJECTIVE 2 (Continued)

ACTION	Refer Section	Timing	Organisational Responsibility	Partnerships / Alliances	Resourcing
<p>Upskill Operators:</p> <p>23) Facilitate the introduction of appropriate, short training programs in association with TAFE, Capricorn Tourism and Tourism Queensland.</p>	6.17	2005/06	<p>CHT Capricorn Tourism</p>	<p>Tourism Qld TAFE</p>	Grant Funding
<p>Opportunity for Product Packaging:</p> <p>24) Arrange a packaging workshop for Central Highlands Tourism and tourism-related operators to gauge interest in participation and explain the package development process.</p>	6.16	2006	CHT	<p>Capricorn Tourism Tourism Qld.</p>	<p>Sponsorship Grant Funding</p>
<p>Opportunity to Develop Agricultural Tourism:</p> <p>25) Establish a Steering Committee and seek grant funding to develop agricultural tourism.</p>	6.3	2006/07	Steering Committee	<p>Primary Producers DPI CHDC Emerald Ag. College</p>	Grant Funding
<p>Opportunity to Develop a Local Signature Dish:</p> <p>26) Initiate action within the region's hospitality industry to develop a signature dish for Emerald/Peak Downs Shires.</p>	6.4	2006/07	Hospitality Industry	<p>DPI Agri-Tourism Steering Committee CHDC</p>	<p>Hospitality Industry Food Producers Sponsorship</p>

STRATEGIC OBJECTIVE 2 (Continued)

ACTION	Refer Section	Timing	Organisational Responsibility	Partnerships / Alliances	Resourcing
<p>Opportunity for a Regional Interpretive Centre:</p> <p>27) Initiate planning and costing for a regional Interpretive Centre at Emerald. Seek grant funding and sponsorship for developing the project.</p> <p>28) Review the potential for a Gemfields Interpretive Centre within 3-5 years.</p>	<p>6.5</p> <p>" "</p>	<p>2006/07</p> <p>2007</p>	<p>Council</p> <p>Gemfield Operators</p>	<p>Industry Sector Gemfield Operators CHT</p> <p>CHT Council DNR</p>	<p>Grant Funding Sponsorship</p> <p>Grant Funding for Feasibility Analysis</p>
<p>Opportunity for Interpretation of the Coal Industry:</p> <p>29) That a cross-regional group is formed to work with the coal industry, Queensland Rail and the operators of the Hay Point coal loading facility to develop a co-ordinate coal industry interpretive trail.</p>	<p>6.13</p>	<p>2007/08</p>	<p>Working Group</p>	<p>Mining Industry Mackay Tourism Capricorn Tourism CHT CH LTOs</p>	<p>Sponsorship Grant Funding</p>
<p>The Opportunity to Establish Geocaching:</p> <p>30) Consider developing and progressively introducing geocaching product throughout the region.</p>	<p>6.15</p>	<p>2008/09</p>	<p>Local Tourism Organisation</p>	<p>CHT</p>	<p>Local Tourism Organisation</p>

STRATEGIC OBJECTIVE 3

To reinforce marketing of the Central Highlands.

ACTION	Refer Section	Timing	Organisational Responsibility	Partnerships / Alliances	Resourcing
<p>The Importance of Co-operative Marketing:</p> <p>31) Actively encourage a co-operative marketing approach by tourism stakeholders.</p>	7.2	Ongoing	CHT	Capricorn Tourism Tourism Qld.	CHT
<p>The Need for a Central Highlands Touring Map:</p> <p>32) Produce an A3 size touring map of the Central Highlands sub-region.</p>	7.3	Priority	CHT	Local Tourism Organisations Councils	CHT
<p>Marketing Issues:</p> <p>33) Progressively target the aviation tourism, sports and conference niche markets as resources permit.</p>	7.4	As Resources Permit	CHT	Capricorn Tourism Tourism Qld. Local Tourism Organisations	CHT

APPENDIX 1

GUIDELINES FOR THE FORMULATION OF LOCAL GOVERNMENT TOURISM POLICIES

MODEL OBJECTIVES

In establishing a tourism policy, Council has as its major objectives:

- 1) To recognise tourism as a social and economic force and as a major employer within the Council area.
- 2) To foster and create a community awareness of the benefits of tourism within Council's area.
- 3) To ensure Council will guide and influence the development of tourism in the local government area.
- 4) To provide the basic facilities and infrastructure sufficient to encourage appropriate tourism development.
- 5) To ensure facilities within the area are adequate to cater for visitors and residents.

MODEL POLICY DOCUMENT

The following policies provide a broad basis for consideration and adoption by Council to guide and direct the development of tourism throughout its local government area, and to ensure a consistent approach to this development:

- 1) Council will work closely with the Central Highlands Tourism Organisation, Capricorn Tourism, Tourism Queensland, and other relevant tourism and community organisations and government departments, in all aspects of tourist development.
 - 2) Council will include in its standing committees a sub-committee which includes tourism.
 - 3) Council will endeavour to provide an adequate budget allocation for tourism expenditure.
 - 4) Council will endeavour to assist (financially and by other means) tourism organisations or events which have the potential to develop tourism in the area.
 - 5) In the formulation of its planning regulations Council will have regard to the requirements of tourism development.
 - 6) Council, in its review of planning instruments, i.e. strategic plans, town plans and development control plans, will take into consideration policies on tourism and other leisure related issues.
 - 7) In the preparation of by-laws and regulations Council will have regard to their impact on tourism and the balanced development of its local government area.
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- 8) Council will encourage appropriate tourism product development and investment throughout the area, and will facilitate the development application process.
- 9) Council will encourage a high standard of design and aesthetics in all forms of tourism development.
- 10) Council will ensure the welfare of the whole community is taken into account when supporting tourism development and the provision of facilities.
- 11) When considering tourism developments Council will consider the social, cultural, economic and environmental impact of the proposal within the area.
- 12) Council will ensure that where sensitive environmental, historic or cultural areas exist, these areas will be adequately protected in relation to development or usage.
- 13) Council will initiate the provision of facilities sufficient to cater for destination and day-trip visitors to appropriate areas within its boundaries.
- 14) Council will seek financial involvement from other sources whenever possible in the provision of tourist facilities.
- 15) Council will encourage a high standard of landscaping of residential and commercial centres within the area.
- 16) Council will, where practicable, support the establishment of regional parks and the enhancement of specific natural features, conserve areas of outstanding beauty, and recognise items of heritage significance.

More specific policies may relate to such issues as:

- Visitor information services and distribution;
 - Licensing of seasonal entertainment and attractions;
 - Scenic routes and lookouts;
 - Use of historic buildings for tourism purposes;
 - Proposals for specific areas of land;
 - Traffic flows resulting from tourism development;
 - Levels of environmental impact; and
 - Protection of areas of outstanding scenic beauty.
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APPENDIX 2

CO-OPERATIVES

There are more than 230 registered co-operatives in Queensland operating in industries as diverse as sugar, dairy produce, horticultural, taxis, housing, retailing and recycling.

A co-operative is an autonomous association of persons who voluntarily join together to meet their common economic, social and cultural needs and aspirations through a jointly owned and democratically controlled enterprise. It may be formed to provide goods or services to its members or to supply goods or services to the general public.

Co-operatives belong to, and are operated for, the benefit of members who generally share investment and operational risks, benefits gained, or losses incurred.

Co-operatives are based on values and self-help, self-responsibility, democracy, equality, equity and solidarity, and members highly value and practise honesty, openness, social responsibility and care for others.

The nature and extent of co-operatives' are dependent upon member support such as the amount of capital subscribed, the personal efforts of directors and officers, and members' patronage of their co-operative.

Co-operatives are unique. They differ from incorporated associations primarily because they can be formed to establish a business that makes a profit for its members. Unlike private companies, co-operatives do not have a limit on membership numbers. Their one-member, one-vote system also differs from public companies where voting rights are linked to share ownership.

A co-operative allows members to engage in both social and economic activities. Co-operatives have a low failure rate because the member service criteria provide for a localised focus of activity.

There are two types of co-operatives:

- 1) Trading co-operatives whose rules allow it to give returns or the distribution of surplus or share capital.
- 2) Non-trading co-operatives whose rules prohibit it from giving returns or distribution on surplus or share capital other than the nominal value of the shares (if any). They may or may not have a share capital.

A co-operative is a body corporate. It can be formed by five people or corporations and is registered under the *Co-operatives Act 1997*. OFT provides the Registry of Co-operatives for Queensland and:

- provides advice on legislative and practical matters in relation to the formation, operation, merging or winding up of a co-operative;
 - approves disclosure statements for members' information;
 - maintains a register of co-operatives under the *Co-operatives Act 1997*. This covers registration of their rules, and all alterations, special resolutions, audited financial reports, lists of directors and officers, and charges given over their assets in order to secure any borrowing by the co-operative; and
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- provides search facilities for persons wishing to search registers or documents or to obtain copies of available documents.

HOW CO-OPERATIVES DIFFER FROM OTHER BUSINESS STRUCTURES

Seven principles of co-operation are central to the operation and establishment of co-operatives.

These are:

1) Voluntary & Open Membership

Anyone has the opportunity to accept the responsibilities of membership.

2) Democratic Member Control

Active co-operative of members, each having one vote.

3) Member Economic Participation

Operations of co-operatives are focused on servicing the members' needs. If it is a trading co-operative, surpluses are normally distributed to members in proportion to business done with the co-operative.

4) Autonomy and Independence

Co-operatives are autonomous. Self-help organisations controlled by their members.

5) Education, Training & Information

Co-operatives provide education and training for their members, elected representatives, managers and employees so they can contribute effectively to the development of their co-operative.

6) Co-operation among Co-operatives

Local, state, national and international networks enhance the co-operative movement.

7) Concern for the Community

Co-operatives work for the sustainable development of their communities through policies accepted by their members.

ADVANTAGES OF A CO-OPERATIVE

- **Service.** The co-operative form of enterprise is specially suited to meeting the collective needs of members, whether they are producers, consumers or workers.
 - **Democratic control.** Each member has an equal say in co-operative matters (i.e. one member, one vote).
 - **Economies of scale.** A co-operative can mean increased buying/selling power and reduced processing/handling costs.
 - **Taxation benefits.** These may be available through the mutuality concept.
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SAPPHIRE GEMFIELDS MEETING

10/11/03

NAME	BUSINESS / ORGANISATION
Rowena Davies	CHDC
Kim Tompson	Gemfest, P&C, ME
Fred Wild	ESC
Peter Brown	Rubyvale Gem Gallery
Michael Taylor	Rubyvale Holiday Units
Les Hayes	Sapphire Trading Post
Brenda Pittaway	Sunrise Cabins Caravan Park
Neville Pittaway	Sunrise Cabins Caravan Park
Andrew Jarrett	Sapphire Safaris, Fossickers Rest
Ann Jarrett	Sapphire Safaris, Fossickers Rest
Anne Hatte	Ramboda Homestead B&B
Jim Hatte	Ramboda Homestead B&B
Kym White	Miners Heritage
Ola Hobin	Bedford Gardens
Sharyn O'Brien	The Big Sapphire
Rae Walmsley	Gem Air Caravan Park, Willows Gemfields
Steve Walmsley	Gem Air Caravan park, Willows Gemfields
Maureen Burns	CHT

CAPELLA PUBLIC MEETING

11/11/03

NAME	BUSINESS / ORGANISATION
Peter Hackshaw	CEO, Peak Downs Shire Council
Bruce McGruar	Owner General Store
Tim Littleton	Police
Leanne Littleton	Hairdresser
Paddy Dries	Bowls Club
Tony Richmond	Caravan Park
Sharon Richmond	Caravan Park
Cr. Mick Shaw	Peak Downs Shire Council
Geoff Braun	Capella Agencies / Golf Club
Harold Braun	Capella Agencies / Info. Kiosk
Brad Greenhalgh	Capella Aquatic Centre
Cr. Laurie Walker	Peak Downs Shire Council
Andy Plunkett	Capella Pioneer Village
John Hallam	Ampol & Bottlebrush Motel
Nicki Tate	Coffee Shop & Gallery
Rowland Tate	Coffee Shop & Gallery
Cr. David Brimblecombe	Peak Downs Shire Council
Jenny Lanyon	Contractor
Cr. Maureen Burns	Peak Downs Shire Council

EMERALD MEETING

12/11/03

NAME	BUSINESS / ORGANISATION
Rowena Davies	CHDC
Dennis Daly	Emerald Maraboon Motor Inn
Ngaire Merrifield	VIC co-ordinator
Linda Lucas	VIC volunteer / teacher
Glen Wass	VIC volunteer
Ken Self	VIC volunteer
Maureen Burns	CHT
Paul Shelton	Main Roads
Ron Chudleigh	CQACC
John Wildermuth	Bull Creek Farmstay
Carol Wildermuth	Bull Creek Farmstay
Fred Wild	ESC
Denis Kiely	Kiely's Farm
Marie Reid	Pioneer Cottage

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VISITOR GUIDES

- The 2003-2004 Central Queensland Holiday Planner
 - Emerald Shire Visitors Guide
 - Discover the Sapphire Experience
 - Great Inland Way
 - Queensland's Central Highlands, Carnarvon Gorge and Sapphire Gemfields.
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WEBSITES

- www.centralhighlandstourism.org.au
 - www.capricorntourism.com.au
 - www.greatinlandway.org.au
 - www.gemfields.com
 - www.emerald.qld.gov.au
 - www.chdo.com.au
 - www.peakdowns.qld.gov.au
 - www.belyando.qld.gov.au
 - www.gemhunters.com.au
 - www.fossicking.com.au
 - www.sapphires.com.au
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