

# UNEARTHING ETHERIDGE: TOURISM DIRECTIONS PAPER

*'Positioning Etheridge Shire as a unique destination of choice  
for domestic and international visitors seeking memorable  
experiences in the Australian periphery.'*

Attention:  
Mr Ken Timms, CEO Etheridge Shire Council

**REPORT PREPARED BY:**

Associate Professor Brent Moyle  
Professor Karine Dupre  
Dr Sheila Peake  
Dr Truc Le  
Dr Anna Kralj  
Dr Elaine Yang  
Dr Margarida Abreu-Novais  
Dr Matthew Lamont

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# EXECUTIVE SUMMARY

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This project is a joint initiative between Griffith University and Etheridge Shire Council with the aim to position Etheridge Shire as a unique destination for domestic and international visitors seeking memorable experiences in the Australian periphery. This project also aims to assist Etheridge Shire in positioning tourism as a key pillar of the regional economy alongside agriculture and the resources sector.

In collaboration with Etheridge Shire Council, Griffith University researchers co-designed a process of community consultation consisting of stakeholders and a community (online) survey to understand residents' aspirations for tourism development in the region. Community consultation took place between December 2021 and April 2022. This Directions Paper presents the community consultation findings alongside a destination competitiveness analysis. These analyses informed a range of strategic directions presented in this paper for consideration by Council. Additionally, specific milestones were proposed and agreed upon with Council to facilitate the development of a subsequent Tourism Masterplan for Etheridge Shire (please see Section 11, Project Milestones).

This Directions Paper provides evidence that Etheridge Shire is fortunate to host to broad-ranging natural resources that hold significant tourism value, particularly the region's geological features. Etheridge Shire has a nascent tourism industry, with numerous natural and created tourism attractions located around the Shire, currently supported by a limited range of visitor accommodation. The region has also made commendable efforts to brand itself as a tourism destination using the *Unearth Etheridge* tagline associated with digital marketing, which presents significant opportunity to enhance competitive positioning. Critically, consultation revealed future tourism development has the support of Council and a majority of the local community.

Despite Etheridge Shire's strengths and potential as a competitive tourism destination, this Directions Paper uncovered numerous critical factors which potentially constrain tourism development in the region. These constraints include issues associated with:

- Road access into, and within Etheridge Shire;
- Gaps in essential services and infrastructure (i.e., medical, telecommunications);
- Labour shortages amongst service-based businesses;
- Range of visitor accommodation;
- Strategic alignment with the Tourism Tropical North Queensland regional tourism organisation (RTO) which Etheridge Shire is currently a member of;
- Issues with wayfinding and interpretive signage;
- A well-developed events strategy;
- Cooperation amongst businesses in working together to develop tourism products; and
- Well-developed service culture.
- Infrastructure and diversity of tourism experiences

This research found that with well-informed, strategic public and private investment, Etheridge Shire is exceptionally well-placed to emerge as a premier peripheral tourism destination that is appealing to a range of visitor segments. The key Directions stemming from this research are:

1. **Capitalise on endowed resources:** Etheridge Shire should enhance the value of its key natural resources (i.e., landscapes, hot springs) through improved information for prospective visitors, on-site interpretive signage, and integration of Indigenous perspectives.
2. **Diversify and enhance created resources:** Considerable additional tourism value for Etheridge Shire should be pursued through investment in innovative tourism facilities such as a tourist mine, museum or 'co-creative experience centre' showcasing the region's geological and mining heritage. Additional

tourism value should be sought by diversifying tourism products (including food tourism), visitor accommodation, events, and catering for active and diverse forms of mobility.

3. **Improve and leverage supporting resources:** Etheridge Shire should vigorously pursue public and private investment to improve essential infrastructure and services required by both visitors and local residents. In particular, improvements are needed to road networks, mobile phone and Internet services, health care and medical services, along with vendors of fuel and groceries. Further, assuming future visitation growth, Etheridge Shire should explore ways of leveraging local aerodrome facilities to improve accessibility into and out of the Shire.
4. **Enhance destination marketing:** Etheridge Shire should critically reflect on its relationship with Tourism Tropical North Queensland (TTNQ) and explore the potential for a 'dual mandate' with Outback Queensland Tourism Association (OQTA) as a major tourism gateway hub to the outback along the Savannah Way. Improved digital marketing should be pursued through targeted enhancements to the Uneath Etheridge website, more strategic use of social media, and considering how tourism branding synergies may be created through collaboration with neighbouring local government areas.
5. **Enhance understanding of tourism demand conditions:** Etheridge Shire Council should implement an annual visitor survey in order to better understand tourism demand-side market characteristics and to monitor visitor satisfaction and preferences in the longer term.
6. **Respond to key situational conditions:** Etheridge Shire must address a range of prevailing conditions that threaten to constrain future tourism development. These include a need for greater awareness among local residents of the economic, social and environmental benefits of well-planned tourism; a need for greater digital literacy and service delivery capabilities within tourism-oriented businesses; and addressing population migration and associated labour constraints faced by the broader local business community.

## Citing this Paper

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# 1. INTRODUCTION

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## 1.1 Tourism in Etheridge Shire

Etheridge Shire lies in the heart of the Savannah Gulf region, Far North Queensland at the base of Cape York Peninsula. The Etheridge Shire covers a vast area of 38,850 square kilometres from the Great Diving Range in the east to Gregory Range in the west. Etheridge Shire is dissected by the Gilbert River, the Einasleigh, the Etheridge, and smaller rivers of Robertson, Copperfield, and Oak. Etheridge Shire has existed as a local government entity since 1882.

According to the Australian Standard Geographical Classifications (ASGC), Etheridge Shire is classified as 'very remote,' situated five hours drive west of Cairns on the Savannah Way, which is a major inland route to the Gulf Country and the fishing destinations of Karumba and Normanton.

According to the 2020 Australian Population Census, Etheridge Shire has a population of 794 across 199 square kilometres. The Shire is comprised of four small, local communities plus outlying farming properties. Etheridge Shire's employment rate in 2016 was 94.9%, with 47.3% in beef cattle farming, 14.4% in Local Government administration and 8.3% in accommodation.

Historically a mining and agricultural area, Etheridge Shire is becoming exceptionally well-known for its diverse landscapes, ranging from sandstone gorges to volcanic caves, hot springs, gold, and gemstones. Within the region lie goldfields, base metal fields and gem fields. Until the late 1800s when beef cattle were introduced, fossicking for precious stones and gold mining were the dominant industries in Etheridge Shire. Mining paved the way for establishment of several communities, some of which no longer exist, such as Cumberland and Kidston, with the latter repurposed as a hydro-electric power generation facility.

By the early 1900s cattle farming had taken over as the primary industry. However, relics of the gold rush days are still evident in the Etheridge Shire, particularly in the settlements of Mount Surprise, Einasleigh, Forsayth, and Georgetown, which remain active places for fossickers. Today's prospectors still search for specimens such as coloured topaz, agates, sapphires, smoky quartz and other precious stones, as well as gold nuggets.

In recent years, Etheridge Shire has seen substantial growth in tourism, particularly domestic overnight visitation. According to Tourism Research Australia statistics, Etheridge Shire hosted 33,000 domestic overnight visitors in 2016, growing to 51,000 in 2020, and 79,000 during 2021, with exponential growth following the advent of the COVID-19 pandemic. The region features spectacular landscapes within peripheral areas of the Shire, and while the geological landscape is currently Etheridge Shire's primary driver of tourism, the region possesses other attractions that, if combined and promoted synergistically, have the potential to further stimulate tourism through more holistic experiences.

Etheridge Shire Council has set the ambitious goal of positioning Etheridge Shire as a unique destination of choice for domestic and international visitors seeking memorable experiences in the Australian periphery. Tourism is viewed by Council and key stakeholder groups as a critical vehicle for enhancing the sustainability and resilience of Etheridge Shire. Tourism is further seen as being capable of adding significant value to agricultural, mining and other sectors in the region. If further developed and promoted in a strategic manner by capitalising on the community's aspirations and a rigorous competitive analysis, tourism development could deliver enhanced economic, social and environmental outcomes by diversifying the region's economic structure by capitalizing on core strengths and adding significant value to traditional economic sectors.

## 1.2 Purpose and Structure of this Directions Paper

In 2021, Etheridge Shire Council engaged members from the [Griffith Institute for Tourism](#) at Griffith University to critically assess tourism to Etheridge Shire and consult with the local community to understand their aspirations for tourism to shape the future of their region. The core aim of these processes is to shape a pathway for long term sustainable and resilient development of the tourism sector in Etheridge Shire. This Directions Paper forms the foundation for a Tourism Masterplan, which will articulate a 10-year vision for the sustainable development of tourism in Etheridge Shire.

This Directions Paper is structured according to ten key sections. Following this introductory section, Section Two describes the research methods used to access secondary data and inform consultation with community and stakeholder groups. Given the already strong economic focus on mining and agricultural within Etheridge Shire, Section Three focuses on 'regions in transition', drawing on case studies to articulate principles which underpin the coexistence of the mining and agricultural sectors with tourism. Section Four presents a critical analysis of tourism within Etheridge Shire as it currently stands, identifying current characteristics of the current townships, essential business and community facilities, visitor accommodation, road, rail and air access, existing tourism attractions and current as well as future visitation to the Etheridge Shire.

Section Five presents the findings from the community and stakeholder consultation processes. A range of data sources are drawn upon including qualitative data gathered through interviews with community stakeholders, and quantitative data collected via an online community survey. Section Six critically examines the destination competitiveness of Etheridge Shire as a tourism destination, design to assist Council to determine unique market position in relation to the key regional competitors. Section Seven reviews the prevailing tourism and policy landscape, identifying key regional, state and national tourism priorities. Section Eight draws upon the key findings of this paper to present a comprehensive range of directions and strategic actions for Council to consider. Section Nine identifies funding opportunities for major infrastructure projects, which could be considered by Council to further develop tourism experiences in the region. Section Ten concludes the Directions Paper and provides a transition to the Tourism Masterplan.



# 2. COMMUNITY CONSULTATION AND RESEARCH METHODS

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This Directions Paper is informed by a range of research methods intended to contextualise Etheridge Shire's current position as a tourism destination, and to understand the community's aspirations for strategic tourism development and promotion into the future. The research approach constituted three distinct phases, deploying a 'sequential mixed methods' approach which draws upon quantitative and qualitative data to address a diverse range of research objectives.

The overarching purpose of this sequential mixed methods approach was to capture key stakeholders' perceptions of tourism in Etheridge Shire in their own words (qualitative methods, e.g., interviews), and to understand the community's aspirations for future tourism on a broader scale (quantitative methods, i.e., community survey). Combining these different research methods ultimately delivers a comprehensive, holistic foundation of evidence capable of informing a future Tourism Masterplan for Etheridge Shire. The details of this research approach are explained in the ensuing sections.

## 2.1 Phase 1: Site visit and Scoping Interviews with Key Stakeholders

An initial site visit was conducted by Associate Professor Moyle in June 2021 to determine the suitability of Etheridge as a case study. Following this initial visit, a team our tourism, architecture and graphic design specialists from Griffith University visited Etheridge Shire in December 2021 to analyse the region's tourism attractions and consult with key stakeholders. This visit investigated existing tourism offerings, community perceptions of tourism, tourism challenges and opportunities, and sought to understand the working relationship between the Council, local community, and tourism providers.

Following the visit by the specialist team, desktop document research, community consultation, and further site investigations were undertaken to identify existing strengths and weaknesses in the Shire's tourism industry and opportunities for potential tourism development in the future. This process underpinned the development of this Directions Paper and the Tourism Masterplan intended to set the foundation for further strategic development of a sustainable and resilient tourism sector for Etheridge Shire.

## 2.2 Phase 2: Desktop Review

Phase Two comprised desktop research which focused on three key areas: regions in transition, destination competitiveness, and tourism policy and planning. The first desktop review sought to draw on a series of 'lessons learned' from case studies of regions with similar backgrounds and economic structures. This desktop review of case studies sought to identify issues faced by regional destinations in developing their tourism potential. It also focused on policy and planning approaches needed to underpin the ability of destinations to diversify and develop new industries. Specifically, Phase Two explores issues associated with transition from a predominately mining and agriculture-based economy to a future economy in which tourism is reinforced as a key economic sector and leveraged to enhance the sustainability of the other economic sectors in the region.

The second desktop review applied the concept of 'destination competitiveness' to Etheridge Shire. Destination competitiveness is an important field of theory within tourism studies. It is broadly concerned with identifying and analysing characteristics of tourism destinations which set them apart from competitor destinations. Phase Two also applied a widely-recognised destination competitiveness framework (Dwyer & Kim, 2003) to Etheridge Shire to identify strengths and potential gaps which should be considered in developing a Tourism Masterplan for the Shire. The destination competitiveness analysis findings are presented in Section Six.

The third desktop review was concerned with understanding Etheridge Shire's current tourism policy and planning landscape. With the assistance of Etheridge Shire Council, members of the Griffith University research team accessed and reviewed a range of relevant policy and planning documents. The purpose of this review was to assess the internal and external landscape of tourism governance within Etheridge Shire. Outcomes of this review assisted in contextualising recommendations made in this Directions Paper and ensuring such recommendations are fit for purpose. Policy and planning documents are included in a compendium attached to this Directions Paper.

## 2.3 Phase 3: Community Consultation

Local support for tourism is a critical factor underpinning the success of proposed future tourism development, thus community consultation and engagement are essential. From a strategic management perspective, tourism is a unique phenomenon in that successful implementation of strategic plans hinges on community support and 'buy-in' to the objectives of a plan. Due to the unique social and economic structures associated with tourism, a region's destination management and other tourism authorities' compliance with a strategic plan depends on support from key stakeholders. To maximise chances of success, the fundamental success of tourism strategic plans rests on tailoring such plans according to the host community's aspirations.

Phase Three comprised a process of consultation with the Etheridge Shire community, which consisted of two stages (interviews and survey). This research process was undertaken with the core purpose of collecting primary data to (i) ascertain existing perceptions of tourism; (ii) better understand critical issues enabling or constraining tourism in Etheridge Shire; (iii) identify the community's priorities for future tourism in Etheridge Shire; and (iv) gauge the community's support for future tourism development.

Community consultation was undertaken by way of interviews with key stakeholders, and a community survey (detailed in Sections 2.3.1 and 2.3.2). Following this data collection, a process of triangulation and consolidation to identify barriers and opportunities for Etheridge Shire was developed. Following data analysis, a comprehensive range of recommendations, priorities and implementation strategies were proposed to facilitate the development of a Tourism Masterplan customised to the community's and Council's needs. The interview and survey findings are presented in Section Five.

### 2.3.1 Community survey

A web-based survey (see Appendix A) was distributed to the community to assist with understanding:

- Community sentiment towards tourism
- Community resilience
- Community perceptions of tourism
- Community support for future development
- Community vision for development of potential tourism experiences
- Sites the community support for tourism development
- Tourism experiences the community desire

The community survey yielded 90 responses. However, these responses would have included a single response from households with more than one person, thus it can be assumed that the response rate represented closer to double this number. Population statistics indicate that, within the Etheridge Shire population of 794, 73% of the population are over 20 years of age, and thus of working age group and able to complete the survey.

Upon completion of data collection, data were collated and analysed utilising a range of descriptive statistical techniques. Statistical analysis included the calculation of frequency distributions and measures of central tendency (mean scores, standard deviation), dependent upon the nature of each measure. This process enabled the data to be presented visually (as presented in Section 5.2), and for trends within the data to be easily identified.

## 2.3.2 Interviews with Etheridge Shire businesses and Regional Tourism Organisations

Key community stakeholder groups, with an emphasis on business owners in Etheridge Shire, were interviewed to determine perceptions of tourism in the Shire. In addition, three tourism organisations from outside Etheridge Shire with a direct connection to tourism were interviewed. Community stakeholder groups, including tourism businesses, were identified through consultation with key Council staff. Community stakeholder groups were approached to participate via email invitation and a follow-up phone call to set up a time. A total of 36 interviews were conducted with community stakeholder groups across Georgetown, Mount Surprise, Einasleigh, Forsayth, Gilberton and Lynd Junction. Interviews were also conducted with relevant Regional Tourism Organisations (RTOs) and other stakeholders.

Interviews sought to delve deeper into the opportunities and challenges for tourism to Etheridge Shire. Respondents were afforded the time to speak at length on the issues they were facing related to tourism, providing greater depth, context and substance to the findings. During each interview, the interviewer took detailed written notes of the conversation to ensure accuracy of recall. Upon completion of the interviews, the interviewers' written note files were collated, typed into a word processing program, and analysed holistically to generate a series of key themes which represent the voices of community stakeholder groups. In accordance with accepted qualitative data analysis practices, recurrent themes from the interviews were identified, and text corresponding with each theme was logged. This logging process then enabled the construction of a textual narrative summarising the key findings from the interviews, which is presented in Section 5.1.

# 3. REGIONS IN TRANSITION: LESSONS FROM THE PAST

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Strategic and sustainable development of tourism in Etheridge Shire presents opportunities to enhance the investment outcomes provided by the existing key economic sectors of mining, agriculture, and government infrastructure projects. Continued focus on a regional economy driven by the resources and agriculture sectors, further underpinned and supported by strong demand for local tourism, will bring many benefits to the Etheridge community. To enhance this transition process, it is useful to reflect on the experiences of other regions that have undergone similar transformations. Section Three will present key learnings from the lived experiences of other comparable destinations – regions that have encouraged the co-existence and integration of tourism alongside traditionally dominant industries of the area.

The study of tourism development in peripheral and remote regions provides a rich background of detailed real-world cases, covering a diversity of contexts. The focus of these case studies has paid attention to issues such as:

- Cross-sectoral linkages between the newly emerging tourism industry and the established major industry, usually mining and/or agriculture (e.g., Moyle et al., 2018; Ramsey & Malcolm, 2018; Schmallegger & Carson, 2010).
- Leveraging infrastructure development opportunities for the benefit of the community (e.g., Lamont et al., 2021; Loehr et al., 2021; Saarinen, 2017; Summers et al., 2019).
- Economic impacts of self-drive tourism development (e.g., Rolfe & Flint, 2018).
- The impact of tourism development and increased tourism demand on resident attitudes and perceived quality of life (e.g., Moyle et al., 2010; Bec et al., 2016).
- Using ‘strategic storytelling’ to create a sense of urgency amongst community members about tourism development, and to build visitor engagement with and understanding of local heritage and culture (e.g., Dionisio & Nisi, 2021; Hartman et al., 2019; Liepins, 2000).
- Tourism development as a driver of territorial re-vitalisation and heritage preservation (e.g.; Chiodo et al.; 2019).

From this wide selection of available case studies that offer important insights, the ensuing review of ‘*Lessons from the Past*’ will focus on three cases that are relevant, applicable, and comparable to the Etheridge context:

- The co-existence of the tourism and resources sectors in Gladstone, QLD (Section 3.1).
- The integration of tourism development alongside the dominant agriculture industry in Manitoba, Canada (Section 3.2).
- The leveraging of investment projects and grants to support the dual development of tourism and traditional sectors in Roma, QLD (Section 3.3).

Examining the realities of these diverse economic structures offers opportunities to reflect on the processes and dynamics that are triggered by tourism development in peripheral areas. Lessons learned will enhance Council’s ability to integrate tourism concerns across its portfolio of responsibilities, to leverage and maximise outcomes.

## 3.1 Tourism and Resources Sectors: Can the Two Sectors Co-Exist?

The resources sector is of great historical and cultural importance as an economic activity within Etheridge Shire. Therefore, the future integration of tourism as an additional, central pillar of Etheridge Shire’s revitalised economy should leverage the resource sector’s rich cultural and environmental assets in creating tourism products. However, **history does show that there can be challenges associated with the co-existence of tourism**

**alongside the resources sector. As such, it is instructive to explore such challenges here, to pre-empt potential barriers to pursuing strategic changes to the region's economic structure.**

In a study of co-existence between the resources and tourism sectors in Gladstone, QLD, a range of challenges were identified (Moyle et al., 2018):

- The potential for resource extraction and associated activities to **degrade cultural and/or environmental resources** which hold value as tourism assets (e.g., damage to the Great Barrier Reef due to shipping accidents).
- Fly-in-fly-out resources sector workers booking out large proportions of local commercial accommodation, thereby **limiting available accommodation for leisure travellers** and in some cases, generating price increases for commercial accommodation.
- Difficulties for local tourism and hospitality operators in **recruiting and retaining staff** due to more attractive remuneration offered by resources firms.
- A perceived **lack of trust between key tourism and resources representatives** can discourage dialogue and cooperation between the two sectors.
- Perceptions held by some tourism and other community stakeholders regarding a **lack of transparency by the resources sector** concerning its operations and contributions towards broader regional development.
- Perceptions of a **power imbalance between the resources and tourism sectors**, in favour of the resources sector.

Notwithstanding the challenges outlined above, the Gladstone case also showed that co-existence between the resources and tourism sectors yielded a range of benefits. These included:

- Financial contributions by resources firms towards new and/or upgraded community infrastructure which can benefit tourism (e.g., harbour improvements).
- Support of community events by way of corporate sponsorship from resources firms. Development of new industrial-themed tourism products (e.g., mine tours).
- Strategic and targeted investment by the resources sector into local tourism infrastructure increases visitation to the area designed to sustain the community when the development stage of the resources sector moves into operational
- Flow-on effects of increased visitation across all sectors benefit hospitality establishments (accommodation and food);

To enhance the co-existence of tourism alongside the resources sector, Moyle et al. (2018) made a range of recommendations:

- **Trust should be developed** between key representatives of the tourism and resources sectors through dialogue aimed at **developing a shared, long-term vision**.
- The shared vision and strategy developed between the tourism and resources sectors within a region should be formalised through a **memorandum of understanding**.
- Key **tourism representatives should be involved in resources sector development initiatives** to encourage the resources sector to consider tourism policy and planning issues in the region.
- The resources sector should be incentivised to participate in regional tourism organisation activities.
- **Measuring the success of economic development goes beyond economic contribution and infrastructure development** – there is a need to consider the net impact on the region that includes community and environmental indicators – negative community impacts can overshadow economic benefits, necessitating community involvement in development and planning.

Dialogue, shared vision and trust drive co-existence between what can be seen as opposing industries – and this dialogue, vision and trust can be carefully coordinated and enhanced through the Council's strategic vision and

operational activities. This theme of coordinated collaboration driven by innovative local leadership is continued in the next case – a success story of integration and cooperation between a dominant agriculture industry and a burgeoning tourism sector in a peripheral location.

## 3.2 Tourism and Agriculture: Integration and Cooperation

Agriculture is a pillar of the Etheridge economy. It firmly underpins the identity and character of local residents and the region. Tourism can enhance and support the agriculture industry, providing additional sources of income that offset the boom/bust cycles of natural resource-dependent industries. Through integration and co-operation, sustainable economic diversification can be achieved.

A success story of economic diversification, where tourism development enhanced rather than replaced the staple industry of agriculture, is the community of Morden, located in a peripheral agricultural region of south-central Manitoba, Canada. Morden (current population 8,700) was established in 1882 after the Canadian Pacific Railway was built, and the farming of grains was introduced on the prairie plains of the area. The community of Morden remains dependent on its agricultural economic base, yet has been successful in diversifying its economy through a variety of means, including (but not limited to) tourism and hospitality. Morden now benefits from a diversified economy, including agricultural services, manufacturing, public and professional services, retail services, and hospitality and tourism.

A study of Morden's diversification through tourism (Ramsey & Malcolm, 2018) found that success can largely be attributed to innovative local leadership, in particular:

- Prioritisation of tourism and hospitality related to the Fossil Discovery Centre located in Morden, in particular the establishment of two revenue streams attached to the Fossil Centre: outreach events and facility rentals.
- The Fossil Centre and related and integrated developments are one aspect of an increasingly diversified rural economy that has seen the population of the community increase by 20% over the past decade.
- Identification of shared interests and points of cohesion across the region's agricultural heritage, Indigenous history, and its geography/geology provided opportunities for a diversified tourism product base in the region.

Some unique attributes that Morden has been able to capitalise on to enhance its attraction as a tourism destination include:

- Morden's location – either at the 'fringe' (i.e., a remote destination in its own right), or as an 'in-between' region (i.e., capitalising on 'route-based' tourism).
- The discovery of fossils and minerals in the area leading to the establishment of a museum in 1971, with a collection based on the donations of local residents. This museum eventually became the Fossil Discovery Centre in 2005 with the aid of community grant funding and is continually revitalised in line with community asset management plans.
- Roadside attractions (e.g., 'the world's biggest...') – these are a source of community pride and heritage recognition, and enhance the totality of the experience, particularly for visitors engaging in 'route-based' tourism – such attractions tend to lure the tourists into the community.

Success factors aside, Morden's economic development was not without its challenges. These included:

- The influence of two competing regional tourism organisations – which were eventually amalgamated but only provided with half the budget that the two organisations previously received – speaking to the larger issues of developing tourism and marketing products in a geographically large region with a small population base.
- The #1 competitor to Morden's Fossil Discovery Centre (the Royal Tyrell Museum in Alberta, which also presents fossil/dinosaur displays, conducts paleontological research and is located in a rural area close to significant fossil dig sites) receives substantial funding from its state government that has recognised



the substantial importance of the museum as a tourism attraction. In contrast, Morden's Fossil Discovery Centre has received 'Star Attraction' status from the tourism marketing organisation of its own state, but no corresponding investment funding, with council required to play an 'entrepreneurial enabling role' to facilitate continued revitalisation in line with tourist and community expectations.

In Morden's case, **tourism has not replaced the traditional emphasis on agriculture, nor the areas' mining heritage. Instead, the community has successfully developed a shared tourism attraction that brings together and celebrates the historic and prevailing pillars of the region's economy**, that also forms the basis for, and connects with, other attractions in the area. A key success factor for Morden has been the strategic and sustained leadership that has overseen tourism development that enhances community pride as well as economic outcomes.

Etheridge Shire Council possesses some of the same key features as Morden, i.e., agricultural, mining and Indigenous heritage and culture; a visitor centre showcasing local attractions and history with a significant collection of minerals and fossils; opportunities to leverage existing and planned infrastructure to further develop tourism offerings; and the ability to position itself as both a destination in its own right, as well as a series of key stops in a larger, meaningful, route-based journey. Etheridge Shire is well-placed to capitalise on these similar attributes, combined with astute and innovative local leadership, informed by robust consultation, cutting-edge research, innovation, and recognition of key role as an **'enabler of tourism'**.

### 3.3 Developing Regional Tourism: Leveraging Funding Opportunities

The cases outlined above highlight opportunities to pursue a revised economic structure in which the tourism, resources and agriculture sectors can co-exist, particularly when effective cross-sectoral collaboration and community leadership strategies are in place. Yet the maximisation of these opportunities requires a community-driven, shared long-term vision.

In a study of regional development in the Roma region of Queensland, Bec and Moyle et al. (2016) identified a range of positive outcomes for the local community from resources sector funding and investment, including:

- A new airport and improved roads, thereby increasing visitors directly to Maranoa Shire.
- Corporate sponsorship of local community events and sports.
- Increased spending in local hospitality, tourism and retail businesses as a result of the increased visitation and sponsorship.

However, airport aside, the Roma study also identified many missed opportunities to leverage infrastructure investments for wider community benefit and longer-term utility. Examples of this include:

- Infrastructure investments that **benefited the mining sector without adding critical services for local residents**,
- **Sponsorships of community-building initiatives that were short-term and discontinued after the coal-seam gas exploration phase**, when the extraction phase led to a reduced presence of resources companies in the area such that Roma became 'out of sight, out of mind' to the key private sector decision-makers.

The Roma study concluded that missed opportunities in Roma were the result of several factors:

- A **lack of incentives for the resources sector to engage** with regional tourism strategic planning and marketing.
- **Differing strategic objectives between sectors** can constrain development of synergies between the two sectors, particularly regarding lobbying governments around policy issues and grant funding.
- Dialogue between the tourism and resources sectors was constrained by a **perceived power imbalance and a lack of trust, transparency and long-term commitment**.

***The resource sector should be encouraged to contribute towards regional tourism infrastructure which can sustain the regional economy following the decline of the development phase of mining, which a critical role to enhance tourism products and experiences, rather than short term events.*** The recurring theme of these cases is collaboration and insightful leadership – the challenges and pitfalls outlined in these three short cases can be mitigated or avoided through the development of a shared long-term vision and strategic processes that encourage cross-sectoral and community engagement, commitment and ‘buy-in’.

### 3.4 Tourism Transitions: Looking Forwards

A key takeaway from this review of ‘lessons learned’ from other regions developing their tourism industry is that ***collective action is powerful when there is multi-level coordination*** of activities through a mutually reinforcing plan of action. Tourism development in peripheral rural areas can only be sustainable if it is perceived as a mutual goal within a community and among the different stakeholders.

Putting aside tensions across economic sectors, the tourism sector itself possesses characteristics that can be barriers to growth. These characteristics and challenges are more acute in remote areas. ***The tourism industry is generally fragmented, and predominantly consists of small or even very small businesses, some of whom may not identify as being part of the tourism industry.*** Small operators are usually risk averse, resistant to change and can lack business acumen. Resources are often limited (staff, infrastructure, access) and competitor tourism operators can be reluctant to cooperate.

The tourism sector can be seen as both a common good and a private enterprise – it is the collective pool of tourism ‘assets’ in a region (natural assets, built assets, and socio-cultural assets) that renders additional value to visitors. Enhancing this collective pool of assets therefore involves multiple operators and stakeholders, each with different viewpoints, motivations, and objectives. ***A networking process is required, and effective networks require coordination.*** Innovation and change are enhanced through collective learning; this needs to take place at both a local level but should also involve outside participants (e.g., surrounding locations, peak bodies, supporting institutions, etc.).

Essentially, ***two factors drive the success of a regional development strategy that is complemented by a sustainable tourism industry:***

1. ***Effective integration of the collective pool of assets that make up the tourism offering of a destination*** – it is the network of offerings that adds value to visitors and residents alike.
2. ***Commitment by various actors and stakeholders across the spectrum of interests in the region*** – as these actors and stakeholders collectively own and manage the assets that need to be ‘pooled’ in order to enhance tourism outcomes for all.

No one actor, operator or entity alone has the ability to enhance Etheridge’s ability to capitalise on tourism opportunities. Developing tourism is a social issue – and is tightly bound to the cultural and historical contexts of the region. Challenges with developing tourism in a peripheral destination are therefore an adaptive problem – there is no ‘one size fits all’ solution and responses to bespoke challenges can take a variety of forms.

Managing a successful tourism transition requires adaptive solutions. This can occur through mobilising as many organisations and actors as possible, both at a local and a wider level to trigger a process of co-evolution that enhances all economic sectors in Etheridge, as well as the livelihoods of community members.

***The local community’s willingness is vital for the success and sustainability of any tourism development project.*** Etheridge Shire has begun the process of gauging the views of residents, of both the value of tourism generally and of any specific projects. This can continue in an iterative process to continually engage with and incorporate residents’ aspirations into tourism development plans. The added benefit of including the local community in the co-creation and delivery of tourism development projects that will enhance their livelihoods, wellbeing and civic pride is that the process ensures that local context and culture are integrated into the design of projects. In turn, this enhances the hospitality and quality of service to visitors, creates project efficiencies and underpins a community attitude that fosters collaboration.



Too often, regional communities have been passive recipients of development projects. This top-down approach has led to missed opportunities to leverage and find synergies. *The Etheridge Shire community can bring about substantial change in the nature and scope of government and private sector investment and funding by positioning themselves as active participants, performing a vital coordinating leadership and community advocacy role.*

### 3.5 Summary

Without proactive coordination, the mining and agriculture sectors are not naturally complementary of tourism as an additional pillar of regional economies. However, as demonstrated in Section Three, there are numerous strategies which may be adopted to create synergies between the three sectors and realise broader economic, social and environmental benefits. Table 3.1 summarises the key take-home messages from this review of case study regions similar to Etheridge Shire.

**Table 3.1 Challenges and strategies associated with co-existence of the tourism, resources and agricultural sectors.**

Challenges	Strategies
<ul style="list-style-type: none"> <li>• Lack of engagement and/or interest among resources firms to participate in regional tourism planning and management</li> <li>• Lack of dialogue/incentives for dialogue between tourism stakeholders and representatives of the mining and agriculture sectors</li> <li>• Lack of synergy between resources-oriented infrastructure investments (both private and publicly-funded) and concurrent opportunities to contribute to tourism development and services for local residents</li> <li>• Perceived lack of trust, transparency and long-term commitment to regional communities by resources firms</li> <li>• Power imbalances in favour of the resources sector, along with fragmentation of the tourism industry hampering stakeholders' ability to lobby in favour of tourism interests</li> <li>• Fly-in-fly-out resources workforce constrains supply of visitor accommodation</li> <li>• Labour constraints due to tourism businesses being unable to compete with remuneration offered by resources firms</li> </ul>	<ul style="list-style-type: none"> <li>• Host communities should encourage resources firms to engage in corporate social responsibility initiatives by making financial contributions towards developing infrastructure and services which benefit the local community</li> <li>• Implement an independently-chaired, cross-sectoral regional forum where tourism, resources and agriculture sectors are encouraged to engage in dialogue for the benefit of the broader community</li> <li>• Ensure that regional cross-sectoral forums are overseen by innovative local leadership capable of fostering trust, cooperation, and procedural fairness between participating stakeholder groups</li> <li>• Tourism, resources and agriculture stakeholders should be encouraged to actively contribute to developing a shared, long-term vision for the host region's economy</li> <li>• Ensure that any shared, long-term co-created vision is formalised through a memorandum of understanding, along with each sector's contributions</li> <li>• Encourage tourism, resources and agriculture stakeholders to jointly develop tourism products and experiences that generate mutual value (e.g., tours of industrial sites)</li> <li>• The resources and agriculture sectors should be encouraged, or obliged through relevant planning instruments, to minimise, and/or eliminate, and/or remediate damage to natural assets holding tourism value</li> <li>• Encourage the resources and agriculture sectors to strike a balance between negative impacts on visitor accommodation and related services (e.g., by constructing temporary accommodation for fly-in-fly-out workers), whilst ensuring local businesses continue to benefit economically from</li> </ul>

	<p>expenditure by transient workers</p> <ul style="list-style-type: none"><li>• Ensure the tourism industry has representation in relevant resources and agriculture development forums to ensure tourism policy and planning is adequately considered</li></ul>
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# 4. TOURISM IN ETHERIDGE SHIRE TODAY

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Having established a contextual foundation in the preceding sections of this Directions Paper, Section Four turns attention to critically analysing tourism potential in Etheridge Shire. The overarching purpose of Section Four is twofold. First, this section takes stock of Etheridge Shire's existing tourism value creating resources to identify strengths, gaps, and opportunities for future tourism development and promotion. Second, Section Four seeks to establish baseline metrics which can be used to measure the effectiveness of future tourism development and promotion initiatives.

Initially, Section Four begins with an overview of key community locations across Etheridge Shire. Attention is then turned to cataloguing existing tourism-related support services and tourism attractions within the region. Finally, baseline visitation metrics are established by drawing upon statutory data sources relating to visitation to Etheridge Shire, namely the National Visitor Survey and the International Visitor Survey.

## 4.1 Towns in Etheridge Shire

This section presents an overview of the key geographic locations across Etheridge Shire and contextualises existing tourism in those locations. Sections 4.2 through 4.4 go on to review existing services and infrastructure relating to tourism. Etheridge Shire has several peripheral nodes outside the main town of Georgetown, with communities in Einasleigh, Forsayth, and Mount Surprise, each of which are examined in the ensuing sub-sections.

### 4.1.1 Georgetown

Georgetown is the main town and the central administrative centre of Etheridge Shire. Georgetown is approximately 450 kilometres west of Cairns along the Savannah Way. According to the 2016 Australian population census (ABS, 2016), Georgetown had a population of 348, 168 of whom were employed either full- or part-time. The main employers in the Georgetown locality are beef farming (37%), local government (23.5%), fuel retailing (5.6%) and accommodation (4.9%).

Georgetown is the largest population centre, and was established in the gold rush period of the 1870s. It is often the starting point for tourists who visit the region. However, Georgetown itself has limited tourism attractions, compared to peripheral areas of Etheridge Shire.

The Shire's Visitor Centre is located in Georgetown with the Ted Elliot Mineral Collection, which houses over 4500 mineral specimens, making it a centrepiece attraction in town. The Terrestrial Centre has recently been redeveloped and opened as part of the launch of Unearth Etheridge. Other interesting features in Georgetown, include the restored Shire Hall (built in 1908), Savannah House, the restored ex-clerk of the Courts dwelling, the Masonic Temple, the Catholic Church (established in 1913), the cemetery, and the Heritage listed Antbed House, built in 1889. A heritage walk in Georgetown's main street tells the story of these historical buildings through interpretive signage. Additionally, there is an international Peace Park and a Georgetown River Walk' to take in the local flora and fauna.

Twenty kilometres West of Georgetown is the Cumberland Dam and Chimney. These features are the final remains of the gold crushing plant that once supported a thriving town and population built around it. The Cumberland Dam is today a favourite spot for bird watchers. Flat Creek Station, known for gold panning, is one hour from Georgetown.



TerrEstrial Centre, Georgetown (image: S. Peake).

#### 4.1.2 Einasleigh

Einasleigh is located 110 kilometres southeast of Georgetown and is the gateway to Copperfield Gorge. Access to Einasleigh is via an unsealed road, either through Forsayth or from the Savannah Way near Mount Surprise. Einasleigh has a locality population of 92 (ABS, 2016), with around 25 people living in the town.

Originally named Copperfield, Einasleigh was established in 1900 on a new township reserve established near the copper mine. Within a year, Einasleigh became a thriving centre with two hotels, a store, a billiard room, butcher and baker shops, and a school planned. It became Etheridge Shire's largest population centre with the development of the Chillagoe Company's Etheridge Railway line (1907-10). However, the mine closure in the 1920s saw the township declined to near extinction, resuscitated only by the continuing rail line from Cairns, now used by the *Savannahlander* train.

Einasleigh has a rich Copper mining history dating back to 1866. Along with its position on the banks of the Copperfield River and Gorge, and as a stopping point for the *Savannahlander* train, Etheridge has immense potential for tourism development. Currently, the Heritage-listed Einasleigh Hotel, is located beside a park, on the edge of the Gorge, with a shaded adventure playground, free electric barbeques and a monument to the 1996 Blackhawk military helicopter training disaster. Further, the Einasleigh cemetery showcases a picture of the township's past history of hardship written on the headstones of those who lost their lives in its development. The Memory Tree in the grounds of the Einasleigh pub and the old stocks behind the police station all add to the charismatic character of Etheridge Shire's smallest town.





**Copperfield Gorge, Einasleigh (image: S. Peake).**

### 4.1.3 Forsayth

Forsayth is located 40 kilometres south of Georgetown and 70 kilometres west of Einasleigh, and is accessible by unsealed roads. Forsayth started as a mining camp in 1871, developing into a small town. After a slump in the price of metals in the mid-1880s, the township again flourished with five hotels, a school and a court of petty sessions. Later renamed as Forsayth in the early 1900s, and by 1910 the Chillagoe Smelting Company had completed a rail link to the town. Forsayth prospered with the additions of a police station, a hospital, a new courthouse and a new school and a public hall. However, in 1914 the Chillagoe Smelters were shut down and the town went into decline. Forsayth remains the railhead for transport to the west, although plans to extend the railway to connect to the Croydon line did not eventuate. Although there were glimmers of renewal in activity in the 1980s due to mining and livestock traffic, today Forsayth is a service centre primarily for road transport and regional tourism.

Forsayth has a small permanent population of around 75 residents, with 129 in the locality (ABS, 2016). Amongst the local population, 94.8% (58 pax) are employed, primarily in the beef cattle industry (54.8%), primary education (11.9%), electrical distribution (9.5%), local government administration (9.5%) and local business (7.1%). At its heart are the Goldfields Hotel and Finnigan's Rest, both of which are open throughout the year. The Goldfields Hotel is a meeting place for locals and visitors alike. The hotel is open seven days each week and has an onsite bar, café, and restaurant, alongside a convenience store, post office, fuel supplies and a world-class agate display. Forsayth also serves as a hub and starting point for visitors to Cobbold Gorge, one of the largest attractions in the Shire.



**Electric boat tour, Cobbold Gorge near Forsayth (image: B. Moyle).**

#### 4.1.4 Mount Surprise

Located on the Savannah Way 95 kilometres from Georgetown, and 284 kilometres from Cairns, Mount Surprise has a population of around 169 (ABS, 2016). In the 2016 census, approximately 55 people were employed either full-time or part-time, primarily in the beef cattle industry (48.9%), accommodation (24.4%), road and bridge construction (6.7%), fuel (6.7%) and freight (6.7%).

Mount Surprise is the first town in the Gulf Savannah region when travelling from the east coast on the Gulf Development Road. Mount Surprise began as a sheep run in 1861, then became a cattle property. The Etheridge Railway between Almaden and Forsayth (1910) allowed the development of the town as an important cattle trucking siding and telegraph centre for the western section of the Tablelands. Two hotels were built during this boom time, although the town went into decline as the mining and cattle industries reduced. In the 1960s, Mount Surprise was revamped with the construction of the Gulf Development Road as a livestock trucking centre.

Today, Mount Surprise is an important hub for tourists visiting the Undara Lava tubes or fossicking for gems at O'Brien's Creek. Although Mount Surprise is a small community, there is visitor accommodation in the form of



caravan parks, a hotel, motel, and camping grounds at O'Brien's Creek. A private business conducts tours daily to Undara. Mount Surprise also features a gem shop where stones are processed on site.



**Undara Lava Tubes, near Mount Surprise (image: S. Peake).**

#### 4.1.5 Other peripheral locations

Whilst Georgetown, Einasleigh, Forsayth and Mount Surprise are focal townships within Etheridge Shire, the Shire's population is dispersed. The 2016 Australian population census (ABS, 2016) reported Etheridge Shire's total population as 799 across an area of 39,199 square kilometres. Approximately 77% of Etheridge Shire's population reside in close proximity to the four focal townships. The remainder reside in smaller locations such as cattle stations within the Shire's peripheral areas. Consequently, vehicle-based mobility around Etheridge Shire is critical for both local residents and visitors alike.


















Interpretive signage at Cumberland Dam (image: B. Moyle).

## 4.2 Essential Businesses and Community Facilities

Table 4.1 summarises the key business services and community facilities located within Etheridge Shire. As can be seen, most of the essential businesses and facilities for Etheridge Shire are centrally located in Georgetown. Georgetown is considered the 'gateway' to Etheridge Shire for visitors and is the administrative hub for the Shire. Other localities such as Forsayth, Einasleigh and Mount Surprise feature only a limited range of essential services including fuel, groceries, post, and limited medical services.



Table 4.1 Essential business services and community facilities within Etheridge Shire.

	Georgetown	Forsyth	Einasleigh	Mount Surprise
 Council	•			
 Information	•			
 Post Office	•	•		•
 Library, Bank, Courthouse	• • •			
 Emergency Services	•	•		•
 Medical Clinic	•	•	•	•
 Accountant	•			
 Sports Centre, Swimming Pool, Golf Club	• • •	•		
 Childcare Centre	•			
 Auto Repairs	• •			
 Service Stations	• • •		•	•
 Butcher	•			
 Groceries, meals	•		•	•
 Church	• •			
 Rail stop		•	•	•

## 4.3 Visitor Accommodation

At present, Etheridge Shire offers a modest range of commercial and non-commercial visitor accommodation. Modes of visitor accommodation in the Shire include:

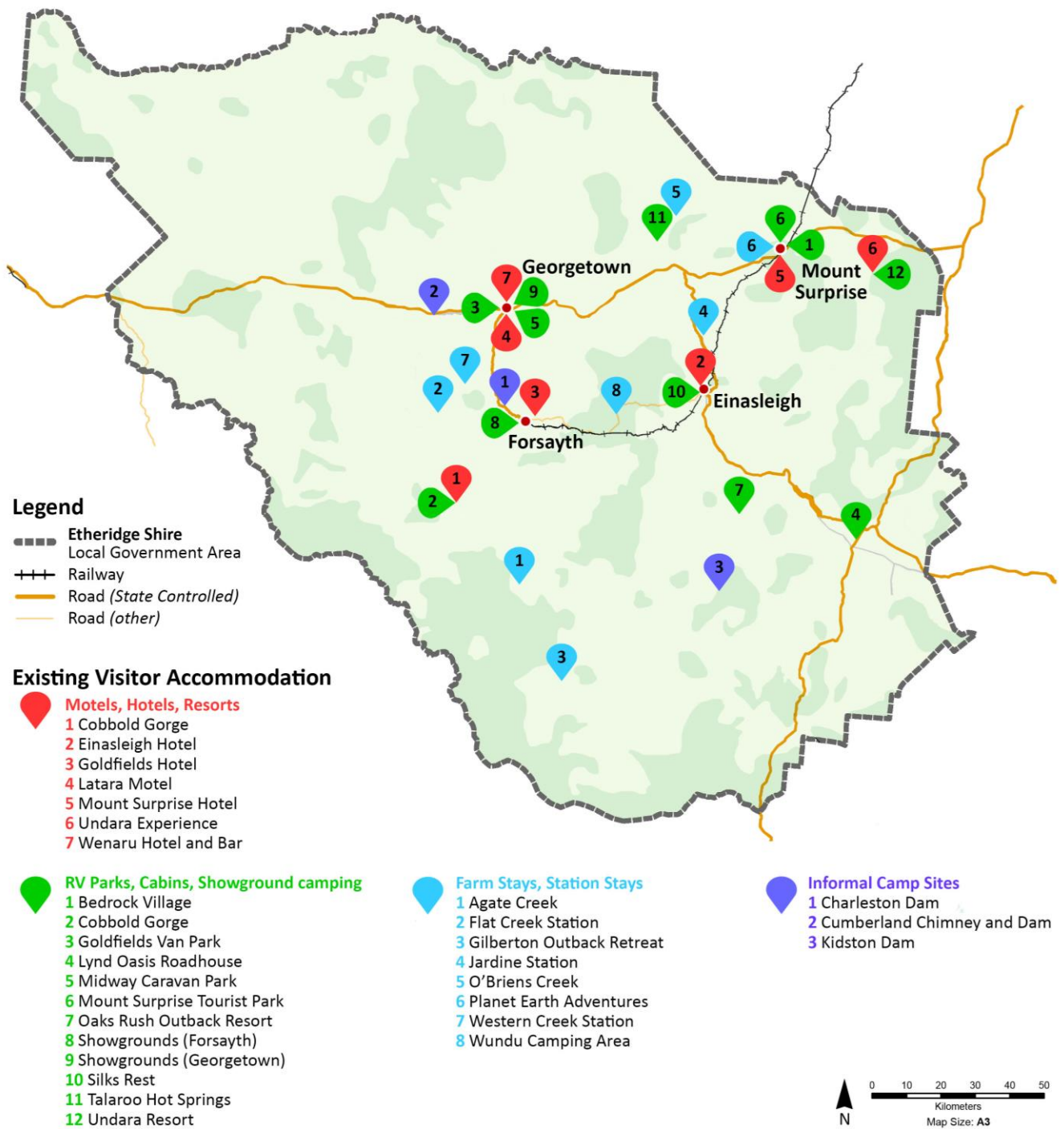
- Motels, hotels and resorts
- RV parks, cabins, camping at showgrounds
- Farm stays and station stays
- Informal camp sites (small charge or free)



**Visitor accommodation at the Einasleigh Hotel (image; B. Moyle).**

As shown in Figure 4.1, accommodation in Etheridge Shire is diverse which caters for a range of existing market segments.

Figure 4.1 Existing visitor accommodation within Etheridge Shire.



## 4.4 Road, Rail and Air Access

The main east-west access road into Etheridge Shire is the Savannah Way. Crucially, the Savannah Way from Cairns through Mt Surprise and Georgetown is sealed. Between Mt Surprise and Einasleigh and onto Forsayth, sections of the road are unsealed. Between Georgetown and Forsayth, the road has sections of mostly sealed with bitumen interspersed with small sections of unsealed roads remaining.

The *Savannahlander* is a seasonal train service that runs from Cairns to Einasleigh and Forsayth. The service is a heritage-themed experience utilising diesel-electric rolling stock constructed in the 1960s and takes between two and four days to travel from Cairns to Forsayth. The train travels at modest speeds of around 50 km/h. The *Savannahlander* is a Department of Transport set route and schedule. Regardless of whether a service has any passengers or not, it must run. Those who travel by the *Savannahlander* to Etheridge Shire must have transfers and accommodation prebooked before they are allowed to board. Accommodation and excursions can be pre-booked by the *Savannahlander* office.

Etheridge Shire features four small airports/airstrips. Georgetown Airport (YGTN) is a public airport featuring a sealed, line marked runway of 1,158 metres in length. Mount Surprise Airport (YMSP) also has a sealed, line marked runway of 1,150 metres. Einasleigh and Forsayth both feature gravel airstrips between 1,150 and 1,200 metres. Currently, none of Etheridge Shire's airports is serviced by commercial airlines. However, privately-owned aircrafts can land at any of the airports with prior Council permission.



**The Savannahlander train (image: B. Moyle).**

## 4.5 Existing Tourism Attractions in Etheridge Shire

Etheridge Shire currently features a diverse range of natural and built assets capable of producing tourism value. Table 4.2 (overleaf) provides a summary of existing tourism attractions within Etheridge Shire.

Etheridge Shire's existing tourism attractions fall into four categories:

- Natural attractions, such as geological features and natural landscapes.
- Created (built) attractions, such as the TerrEstrial visitor information centre in Georgetown.
- Heritage-themed attractions, such as relics from the region's gold mining era and fossicking areas.
- Recreational attractions, such as walking trails.

Etheridge Shire currently has approximately twenty distinct sites that have tourism value. Some of these attractions overlap between the categories identified above. For example, the Georgetown River Walk is a recreational resource that offers heritage value due to the interpretive signage which tells visitors the story of Georgetown's history.

As will be elaborated upon later in this Directions Paper, there are opportunities to derive further tourism value from Etheridge Shire's existing tourism attractions through enhanced site presentation, product packaging, and promotion.



**Table 4.2 Existing tourism attractions in Etheridge Shire.**

Attraction	Location	Description
<b>Key Tourist Attractions</b>		
<b>Undara Lava Tubes</b>	East of Mount Surprise	Geological attraction, large naturally-formed caverns created by ancient lava flows. Accessible only by guided tour (currently two commercial operators).
<b>Cobbold Gorge</b>	'Robin Hood' cattle station, 90 kilometres south of Georgetown	Seasonal – open 1 April until 31 October. Accessible by guided tour only. Features an 11 metre-long glass walkway allowing visitors to walk the gorge's length. Popular bushwalking and bird watching site. Electric boat cruise available. Nearby accommodation for RVs, caravans and camping. Restaurant and bar.
<b>Copperfield Gorge</b>	Einisleigh	Large, sheer sandstone walls dropping into the Einisleigh River. Popular swimming location. Accessible to the public free of charge. Commercial tours of Copperfield Gorge and Einisleigh available.
<b>TerrEstrial Visitor Information Centre and Ted Elliot Mineral Collection</b>	Georgetown	Houses the local library with many historical photographs of an era gone by, a small art gallery with works for sale by local photographers. Ted Elliot Mineral Collection comprises over 4500 specimens displayed throughout nine themed rooms. Contains local mineral finds and specimens from around the world.
<b>Talaroo Hot Mineral Springs and Station</b>	Between Mount Surprise and Georgetown on the Savannah Way	Operated by the Ewamian People as an Indigenous Protected Area and Nature refuge. Offers multiple hot spring pools, accommodation (camping and caravan/RV sites) and café. Hot springs accessible only by guided tour.
<b>Secondary Tourist Attractions</b>		
<b>Cumberland Chimney and Dam</b>	Between Croydon and Georgetown on the Savannah Way	Remnants of a 19th century goldmine built by Cornish miners. Key feature is a historical brick chimney left behind from mining operations. Bird watching location by a large lagoon with interpretive signage. Camp sites available.
<b>Agate Creek Mineral Reserve</b>	Approx. 70 kilometres south of Forsayth	Mineral fossicking area. Accessible only by gravel road and 4WD. May be inaccessible during wet season.
<b>O'Briens Creek Gemfields</b>	Approx. 40 kilometres from Mount Surprise	Mineral fossicking area Accessible only by gravel road and 4WD. May be inaccessible during wet season.
<b>Western Creek Gold</b>	Northwest of Forsayth	Gold prospecting area. Bush camping available for fee.

Attraction	Location	Description
panning area		
<b>Charleston Dam Recreation Area</b>	Forsayth	Recently completed dam around 6km from the Forsayth township, with associated community recreation facilities, such as fishing, watersports and picnic areas.
Other Locations with Tourism Potential		
<b>Antbed House</b>	Georgetown	Heritage-listed house located in Georgetown. Believed to be constructed in the late 1800s as a mining manager's residence. One of only three houses built from antbed (termite mounds) in Australia.
<b>Masonic Lodge</b>	Georgetown	Located in Georgetown. Rare example of a corrugated iron Masonic Lodge.
<b>Georgetown peace memorial</b>	Georgetown	Situated behind the TerrEstrial Centre in Georgetown, the Peace Monument is a collection of rocks each dedicated to various peace activists such as Martin Luther King Jr., Mahatma Gandhi, Nelson Mandela, and local activists such as Julian Burnside and Eddie Mabo.
<b>Stamper battery</b>	Georgetown	Historical relic of the gold mining era in Georgetown. Located in the park beside the Etheridge River.
<b>Georgetown River Walk</b>	Georgetown	Walking trail of approximately six kilometres. Follows the banks of the Etheridge River and Sandy Creek. Offers interpretive signage containing information about the history of Georgetown.
<b>Einasleygh Hotel</b>	Einasleygh	Historical pub built in 1909. Offers visitor accommodation in close proximity to Copperfield Gorge.
<b>Goldfields Hotel</b>	Forsayth	Classic outback hotel offering meals and hospitality.
<b>Bedrock Village</b>	Near Mount Surprise	Outback camping experience. Offers guided tours to the Undara Lava Tubes. Guests are able to board the <i>Savannahlander</i> train for a tour through to Einasleygh.

## 4.6 Tourism Visitation to Etheridge Shire

The previous sub-sections provided an overview of Etheridge Shire’s existing tourism services and attraction capabilities. The ensuing sub-sections now focus on presenting data which may be used as a baseline for measuring the impact of future tourism development and promotion initiatives in Etheridge Shire.

The following analyses are based on the datasets provided by Tourism Research Australia’s International Visitor Survey and National Visitor Survey (Tourism Research Australia, 2021). Five-year trend analysis was conducted between 2015 and 2019 for the Etheridge Local Government Area (LGA). COVID impact to the region was analysed using the two COVID years 2020 and 2021. All years indicated below are calendar year.

### 4.6.1. Five-year visitation trend analysis (2015 – 2019)

Figure 4.2 displays data relating to visitation to Etheridge Shire amongst domestic and inbound (international) visitors between 2015 and 2019. Between 2015 and 2016, domestic overnight visitations<sup>1</sup> to Etheridge Shire LGA declined sharply from 60,000 to 33,000 visitors, followed by a gradual recovery between 2016 and 2019 (33,000 to 54,000 visitors). Overall, domestic visitations saw a decline during this five-year period of -2.5% (five-year average annual growth rate [AAGR] between 2015 and 2019).

Inbound visitations to Etheridge Shire experienced more severe fluctuations over the same five-year period with a peak in 2016 of 4,711 visitors. Overall, inbound visitors to Etheridge saw a significant increase from 1,979 visitors in 2015 to 3,551 visitors in 2019. This market segment experienced a particularly robust growth in inbound visitations with a five-year AAGR of 19.9%.

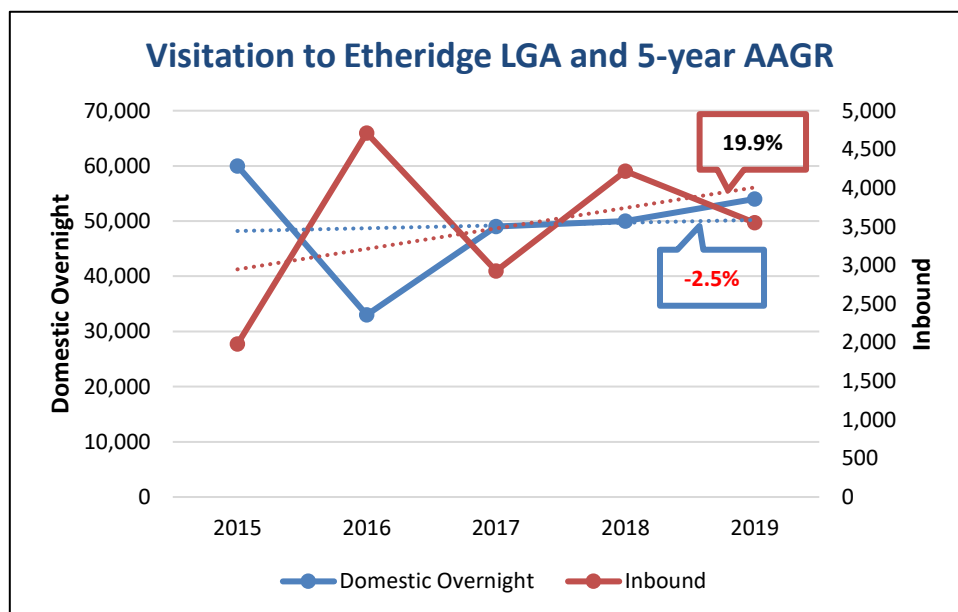


Figure 4.2 Domestic and inbound visitation to Etheridge Shire 2015-2019.

<sup>1</sup> Domestic daytrip visitations to Etheridge were not reported due to insufficient sample size.



## 4.6.2. Average length of stay (ALOS)

Figure 4.3 shows that Etheridge Shire benefited from a slight increase in domestic overnight visitation ALOS from 2.2 days in 2015 to 2.9 days in 2019 with a five-year AAGR of 7.9%. Similarly, ALOS among inbound visitors also experienced a robust growth during the 2015-2019 period with a five-year AAGR of 19.9% (from 1.8 days in 2015 to 3.3 days in 2019).

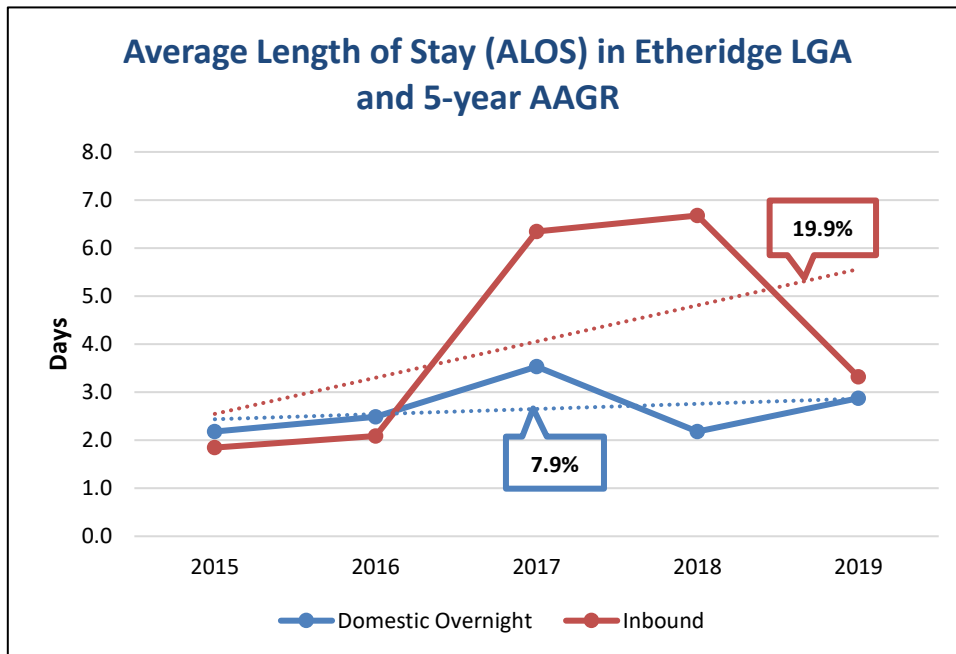


Figure 4.3 Domestic and inbound average length of stay within Etheridge Shire 2015-2019.

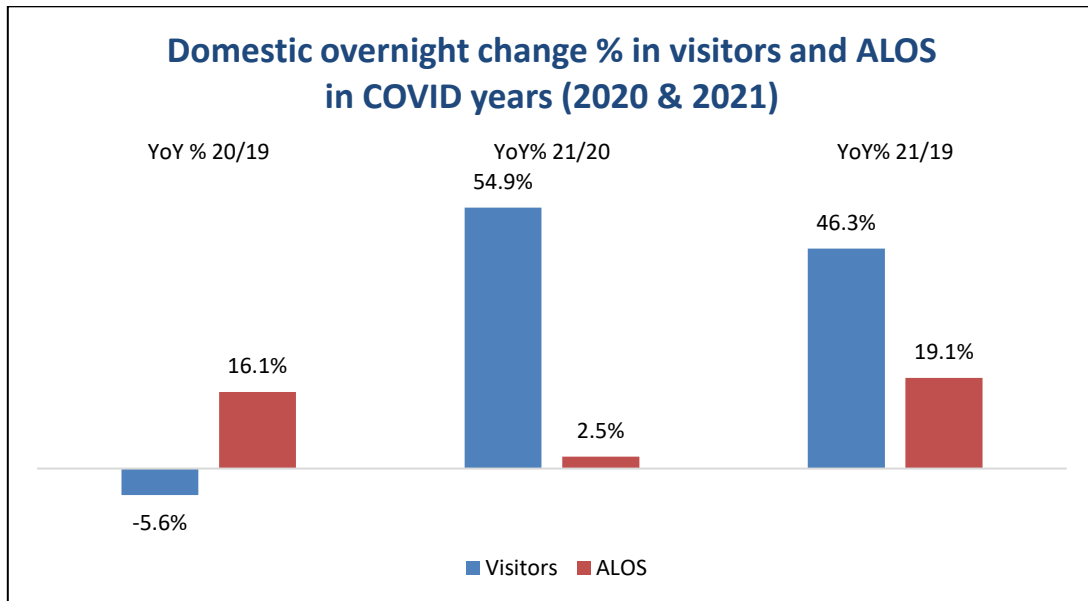
## 4.6.3. COVID impact on domestic visitation<sup>2</sup> (2020 – 2021):

As illustrated in Figure 4.4, in 2020, despite the impact from the COVID-19 pandemic, Etheridge Shire only experienced a slight drop (-5.6%) in domestic overnight visitations (from 54,000 in 2019 to 51,000 visitors in 2020). This drop in domestic visitation is much lower than that for Queensland overall in the same period (-5.6% compared to -35%). Despite the impact of the COVID-19 pandemic, domestic overnight visitors stayed longer (16.1% increase) in Etheridge Shire during the 2019-2020 period (2.9 days in 2019 compared with 3.3 days in 2020).

In 2021, Etheridge Shire achieved a remarkable domestic overnight visitation number (79,000 visitors in 2021 calendar year), which significantly outperformed every single year in the last 7 years. As a result, the year-on-year change (YoY%) between 2021 and 2020 was significantly high at 54.9%, while the YoY% between 2021 and the baseline pre-COVID year 2019 was 46.3%. Such figures are even more impressive when compared with Queensland as a whole, in which the YoY% between 2021 and 2019 was -21% and the annual change between 2021 and 2020 was extremely modest at 0.1%.

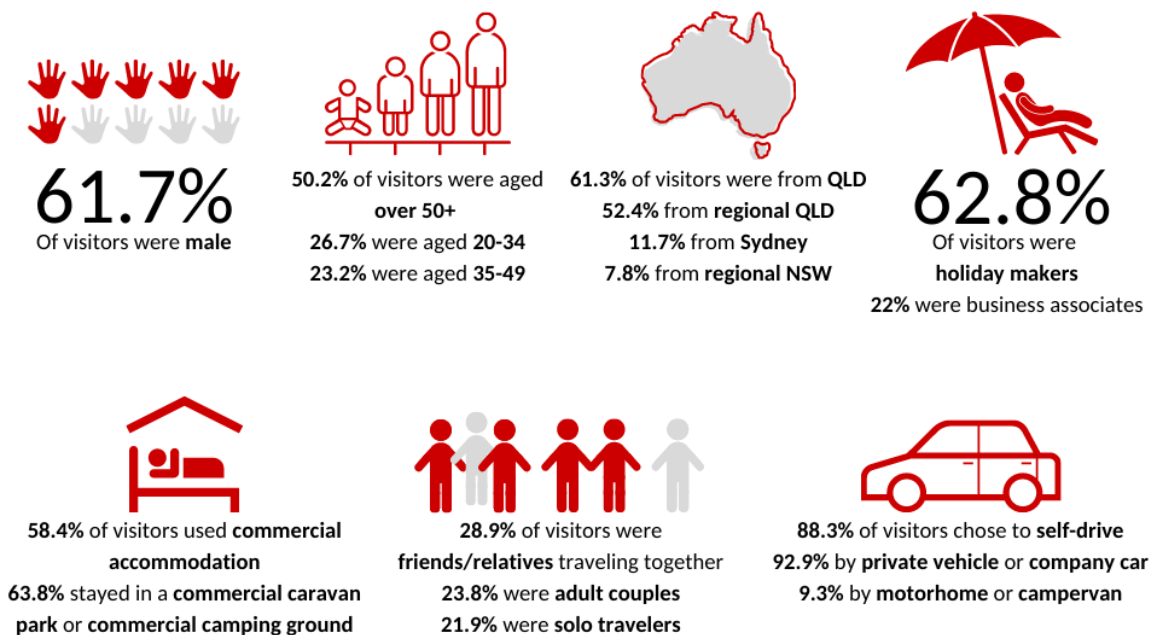
The ALOS in 2021 remained relatively high at 3.4 days which is slightly higher than that of 2020 and increased by 19.1% compared to 2019. Such figures indicate a strong growth of the Shire's tourism during the COVID years, which can be partly explained by state border closure during the last two years leading to the exponential rise in intrastate tourism and self-drive tourism (University of Queensland, 2020; UNWTO, 2020).

<sup>2</sup>COVID impact on international segment was not reported to due insufficient sample size for 2020 and 2021.



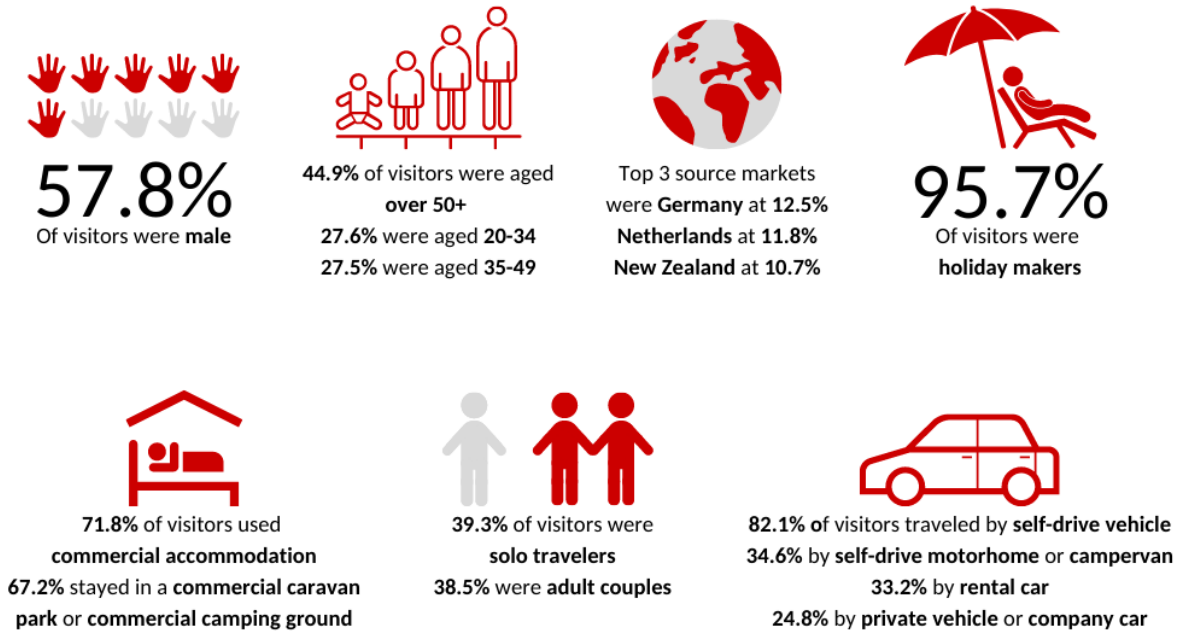
**Figure 4.4 Domestic and inbound year-on-year change (visitation and average length of stay) within Etheridge Shire 2019-2021.**

#### 4.5.4. Domestic Segment Profile<sup>3</sup>



<sup>3</sup> Domestic segment profile was created using 2019 3-year rolling average (2017-2019) of domestic overnight visitations to the Etheridge LGA (Tourism Research Australia, 2021a).

#### 4.5.5. International segment profile<sup>4</sup>



#### 4.6.6. The future of visitors to Etheridge Shire

The robust growth of domestic visitation to the region is evident during the two COVID years yet temporary resulting from the state border closure during the pandemic. Whether the robust growth remains depends on marketing initiatives and the rejuvenation of memorable and novel tourism experiences in the region.

This exponential rise in visitation also implies that existing infrastructure in the region **will not be/have not been adequate** to facilitate the inflow of tourists which will have an impact on environmental and social carrying capacity of the region and present significant potential to impact the quality of life of local residents.

It is vital to focus on rejuvenating and building transport and accommodation infrastructure to adapt to the growth of visitation in recent years, especially with **commercial caravan park or commercial camping grounds**, which accounts for nearly 65% (domestic visitors) and 70% (international visitors) of the commercial accommodation options in the Shire.

In addition to Baby Boomers (aged 50 and above) as the dominant market to the region, younger demographics are evident for both domestic and international segments, that is, visitors considered as Generation X (1965–1979) and Generation Y (1980–1995). Younger generations, commonly termed millennials, appear to have a stronger influential power over digital word-of-mouth (Jamaludin et al., 2018) and an increasingly critical cohort for the tourism industry, due to their high-income levels, mobility associated with early life stage, and longevity as a market segment for rural destinations (Lewis et al., 2021).

With higher influential power on the digital domain, **the use of social media** among younger generations is vital due to their desire to curate their travel experiences for public display and consequently impacts the types of experiences and places they visit - in that there is a preference for what may be **Instagramable** (Liu et al., 2019).

Also, when travelling, **Millennials are more ecologically aware, conscientious, and appreciative of cultural and natural landscapes** that provide an authentic experience and expand their understanding of the world and

<sup>4</sup> International segment profile was created using 2019 3-year rolling average (2017-2019) of international visitations to the Etheridge LGA (Tourism Research Australia, 2021b).

their position within it (Yousaf et al., 2018). This creates a desire among this cohort to use travel as **a means of improving the places they visit** (Veiga et al., 2017).

Further, The Deloitte Millennial Survey (Deloitte, 2021) found that nearly **seven in ten** Australian Millennials and Gen Zs claim that the pandemic has inspired them to **take positive actions to improve their own lives**, and a majority say that it has highlighted **new issues for them and made them more sympathetic toward the needs of others in their local communities**.

For these reasons, **Millennials** are a generation that will transform travel and tourism, particularly in remote destinations. Etheridge Shire, however, has the advantage of spectacular landscapes and a variety of unique tourism products and experiences that **portray the local and authentic culture of the region**. These elements play **a critical foundation** for the Shire to thrive on attracting this demographic to visit the region, using the cohort's desire in taking **positive actions towards the local communities**, and making use of their **powerful digital footprints** in developing digital word-of-mouth marketing for the Shire.

# 5. COMMUNITY CONSULTATION FINDINGS

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Having contextualised the geographic and economic structure of Etheridge Shire, including the existing contribution of tourism as an economic activity, Section Five now shifts attention to presenting outcomes of the community consultation processes undertaken by the Griffith University research team. As outlined in Section 2.3, primary data were collected in a series of interviews with key stakeholders across Etheridge Shire in addition to a community survey of Etheridge Shire residents.

The overarching purpose of this community consultation was to gauge support for future tourism development within Etheridge Shire, and to develop a nuanced understanding of the community's aspirations for future tourism initiatives in their region. Section 5.1 presents a summary of the interview findings, whilst Section 5.2 presents findings from the community survey.

## 5.1 Interview Findings

Interviews were structured into four sections designed to elicit a wider perspective on tourism across Etheridge Shire. These four sections broadly addressed:

- Business holders' understanding of their role in tourism in the Shire;
- Perceptions regarding the benefits and consequences of tourism;
- Preferences for further tourism development; and
- Barriers and enablers of tourism.

**Eight core themes emerged from conversations with stakeholders which will require specific attention in development of a Tourism Masterplan for Etheridge Shire. These themes included:**

1. **Improvements to road, rail and air accessibility into and within Etheridge Shire;**
2. **Desire for enhanced wayfinding and interpretive signage across the Shire;**
3. **Focus on developing tourism initiatives within peripheral areas of Etheridge Shire;**
4. **Improve cooperation amongst businesses in working together to develop tourism products;**
5. **Enhance consultation with the community regarding tourism development and promotion;**
6. **Focus on connectivity, particularly inconsistent mobile coverage across Etheridge Shire;**
7. **Improve/foster cooperative tourism promotion within Etheridge Shire**
8. **Address labour supply constraints within local businesses.**

### 5.1.1 The role of local businesses in Etheridge Shire tourism

***'Everyone understands tourism is the lifeblood. Without them we don't have a pub!'***

Business stakeholders who were interviewed widely viewed their business as critical to enabling tourism in Etheridge Shire. ***They also widely endorsed tourism as beneficial for the Shire and wished to see visitation increase.*** However, just half of the interviewees felt that the local community was not supportive of tourism development, while around two-thirds of those interviewed felt that tourism businesses cooperate sufficiently with one another to facilitate tourism development for the region. There were also widespread calls for a community-based representative group or forum where businesses could come together to discuss common issues and develop solutions in liaison with Etheridge Shire Council, potentially facilitated by an independent organisation.

When asked about how they go about attracting visitors, the businesses interviewed explained using a variety and combination of strategies such as websites, social media, specialised camping online sites such as Wiki Camps, attending trade shows, and advertising in relevant publications. However, many relied on return customers, word of mouth or being in a prime main road location, while those with no or limited email or internet were only contactable by phone.

### 5.1.2 Perceived benefits and adverse impacts of tourism

***'The influx of tourists into the area creating more employment, create opportunities for grants, a bit of infrastructure, ... it's keeping the place alive in a sense. It's certainly alive when the season starts because the whole place fills up with tourists. And then you've got the locals who curse tourists because they can't get a park in the street, they've got to line up for a coffee.'***

Participants were asked how they believed increased tourism could benefit or adversely impact Etheridge Shire. ***The key benefit identified was the ability of tourism to bring new money into the local economy.*** Participants recognised that growing the local economy in this manner may facilitate improved facilities and services benefiting locals and tourists alike. Tourism was also identified as a vehicle for opening up grant opportunities that can contribute to infrastructure development which benefits both visitors and local residents. Some participants also recognised that economic development through tourism growth could assist in reducing outbound migration from Etheridge Shire amongst young people through increased business and government investment, and associated job creation opportunities.

Potential adverse impacts of tourism growth were viewed as minimal, with the benefits perceived as outweighing any consequences. Three core adverse impact possibilities were identified. These included ***increased impacts on the Shire's already strained road network*** due to increased vehicular traffic; ***fears of health impacts*** on the local community due to potentially increased risk of Covid-19 transmission; ***and negative environmental impacts*** flowing from tourists potentially camping in non-designated areas (e.g., litter, human waste disposal, visual pollution). To a lesser extent, some interviewees were concerned about displacement of local residents due to visitor crowding (e.g., difficulties with town parking during holiday peak periods).

### 5.1.3 Perceived barriers to tourism development within Etheridge Shire

***'The ingrained attitude is that you are not entitled to additional grades or good road conditions, such as two-way arterial roads. As a self-drive domestic destination, the word of mouth regarding roads is what will make someone choose to visit or not.'***

When asked about perceived barriers to tourism development in Etheridge Shire, responses were diverse. Three sub-themes emerged as summarised below:

#### **Gaps in essential infrastructure and services:**

- Poor quality of roads across Etheridge Shire.

- Inadequate communication, particularly mobile reception in peripheral areas. Some townships were also identified as having Internet connectivity limitations.
- Limited accommodation for staff of local businesses to live if they are not from the area. This contributes to problems with businesses being able to attract and retain staff.
- Limited residential land zoned for people to come to the area and live (e.g., to start a business or build a home).

#### **Gaps in tourism services and facilities:**

- Limited infrastructure for older travellers (e.g., lack of medical services).
- Tourism capacity limited by room availability.
- Limited facilities for travellers to use internet and have coffee.

#### **Tourism coordination, governance and promotion:**

- Potential for more council support, particularly complex processes of enabling new tourism initiatives, lack of timely response.
- Some participants felt that there is a lack of interest in tourism development amongst local residents. Also, many local businesses are not tourism focused.
- Issues with cooperation between businesses to service tourists (e.g., some businesses do not open during holiday seasons).
- Calls for better quality tourism marketing materials (e.g., coordinated map/brochure of the region for distribution to visitors).
- Perceptions that central townships receive most of the administrative support and funding, whilst peripheral areas of the Shire miss out.

#### **To overcome the barriers identified above, interviewees suggested the following strategies:**

- Increasing the number and diversity of visitor accommodation services.
- Upgrading the aesthetic aspects of town entrances and key landmarks (e.g., creating green spaces/parks featuring sculptures, kept gardens, and/or water features).
- Improve town water access and other supporting infrastructures.
- Develop the Shire's key airports to enhance access by air; make car hire services available at a central airport in future.

### **5.1.4 Preferred future tourism development within Etheridge Shire**

***'Developing specialised itineraries for driving, walking, birdwatching, history etc. would be a great way to bring people into the area and move them from Cairns, the gateway to the region.'***

Participants were asked what aspects of Etheridge Shire could be further developed or improved to enhance the Shire's appeal as a tourism destination. ***Participants mostly indicated they would prefer to see development balanced across Etheridge Shire, including in the smaller centres and on more remote properties and stations.***

Findings relating to preferred tourism development fell into four sub-themes: tourism experiences, community services and infrastructure, signage, and tourism-specific services and infrastructure. These sub-themes are elaborated upon below.

#### **Tourism experiences**

Participants believed there are ***wide-ranging opportunities for the creation of new tourism experiences*** across Etheridge Shire, alongside enhancement of existing offerings. Suggestions included:

- Enhanced mining-themed experiences, such as redeveloping the Einasleigh Copper Mine and Smelter into a tourism precinct.
- Developing natural rock formations (e.g., sandstone, volcanic, basalt, gems, gold) within the region into tourism experiences.
- Introduction of trail-based experiences (e.g., scavenger hunt trails guided by mobile apps).
- Explore ways of better enabling visitors to learn about history of Cumberland Dam.
- Developing experiences themed around niche interests (e.g., star gazing, birdwatching, gold fossicking).
- Introduction of aviation tours (e.g., light aircraft and/or helicopter tours utilising the four existing airstrips within Etheridge Shire).
- Develop a museum or 'mining experience centre' in Einasleigh to attract people.

### **Community services and infrastructure**

Community services and infrastructure service the needs of local residents and visitors alike. A small number of suggestions were made in this respect:

- Further development of cycling and walking tracks.
- Sporting facilities for community groups.
- Trial innovative micro mobilities for community and tourists, such as e-scooters and e-bikes.

### **Signage**

***Signage was a strong, recurring issue that participants believed could assist in enhancing visitor experiences*** within Etheridge Shire. Key suggestions relating to signage improvements included:

- Erecting clear, visually pleasing signage with consistent branding to mark entrances to key townships.
- Placement of more (or where appropriate, improved) interpretive signs and story boards within towns to showcase significant places and events, for example:
  - Copperfield River Gorge, Tree of Life, Black Hawk Helicopter tragedy monument.
- Installation of interpretive signage on old buildings and other places of historic importance such as cemeteries.
- Improved wayfinding and interpretive signage on existing walking/cycling tracks.
- Integrate QR codes onto signage, where appropriate, linking visitors with corresponding web pages containing additional information or linking to commercial operators' websites.

### **Tourism-specific services and infrastructure**

Several suggestions were made for improving tourism-specific services and infrastructure:

- Further development of farm and station-themed visitor accommodation and day-visit tourism experiences.
- Construction of a walking track to Red Rock Hill.
- Improving aesthetics of Copperfield Gorge (e.g., weed removal, path repairs).
- Additional accommodation in Einasleigh and Forsayth (beyond vehicle-based facilities).
- Installation of overflow for camping into Forsayth showgrounds grounds.



## 5.1.5 Enhancing tourism governance within Etheridge Shire

***'There is a need for a five-year vision with a 'to do' list. Needs a neutral/external person to drive this to keep the individual interests of miners, fishing, agricultural and tourism focused on developing the region.'***

***Participants widely called for tourism governance within Etheridge Shire to be revisited.*** They expressed a desire for changes to the ways governance entities engaged with community regarding tourism management and development. Participants also called for greater ***opportunities for broader community involvement in decision-making relating to tourism*** in the Shire. Specific suggestions included:

- Develop a shared, long-term vision and strategy for tourism in Etheridge Shire.
- Etheridge Shire tourism strategy to be overseen by an independent entity focused on balancing the interests of all stakeholders (Council, mining, fishing, agricultural and tourism) and on developing the region for the greater good.
- Enhance cooperation between tourism operators and foster collaborative thinking. Reinstate ETAG (Etheridge Tourism Advisory Group) with an external independent body to mediate relationship with council and ensure any recommendations were deidentified.
- Greater emphasis to be placed on tourism management and development as a process of co-creation.
- Adopt a more bottom-up approach to tourism governance, with grassroots community stakeholders placed as a central driver of the co-creation process.
- Council to adopt a more balanced perspective on fostering tourism across the Shire (e.g., addressing community perceptions that central locations receive preferential treatment to peripheral areas).
- Council to review tourism development processes with the view to streamlining processes, being more supportive of small business applicants in ensuring applications have maximum chance of success.
- Improved Council participation in community-driven tourism meetings.
- Enhanced consultation by Council with key stakeholders regarding scheduling of meetings and workshops (e.g., to avoid workshops being held in peak holiday seasons).
- Council could more proactively engage with business holders to assist with business development (e.g., some stations expressed an interest to broaden operations to include visitor experiences, though perceived too many hurdles with gaining Council approval).
- Implement mechanisms to ensure Information Centre provides unbiased information to visitors.

## 5.1.6 Enhancing promotion of Etheridge Shire Tourism

***'Our town may be small, but we have so much to offer within our Shire ... it's about encouraging [visitors] to do something different.'***

Effective promotion of Etheridge Shire as a tourism destination will be crucial in driving future tourism growth. Besides promotion of the Shire itself, some participants also emphasised that ***internal promotion of tourism within the Shire will be essential to encourage 'buy in' of the Tourism Masterplan*** amongst the community.

Suggestions relating to external tourism promotion included:

- Develop bespoke itinerary options for different segments of visitors (e.g., self-drive visitors, walking tours, bird watchers, history enthusiasts).
- Better emphasising historical aspects of the Shire, such as older buildings.
- Send information centre staff/marketing person to trade/caravan shows to represent the entire Shire.
- Attract trades people, and release land for businesses and homes for staff.

- Ensure Council Facebook posts/ community boards include smaller towns and events.
- Work with RTO to market the whole shire, not just large operations.
- Ensure Council Website and Uneath Etheridge pages include smaller operations and attractions.

Suggestions relating to internal tourism promotion within Etheridge Shire included:

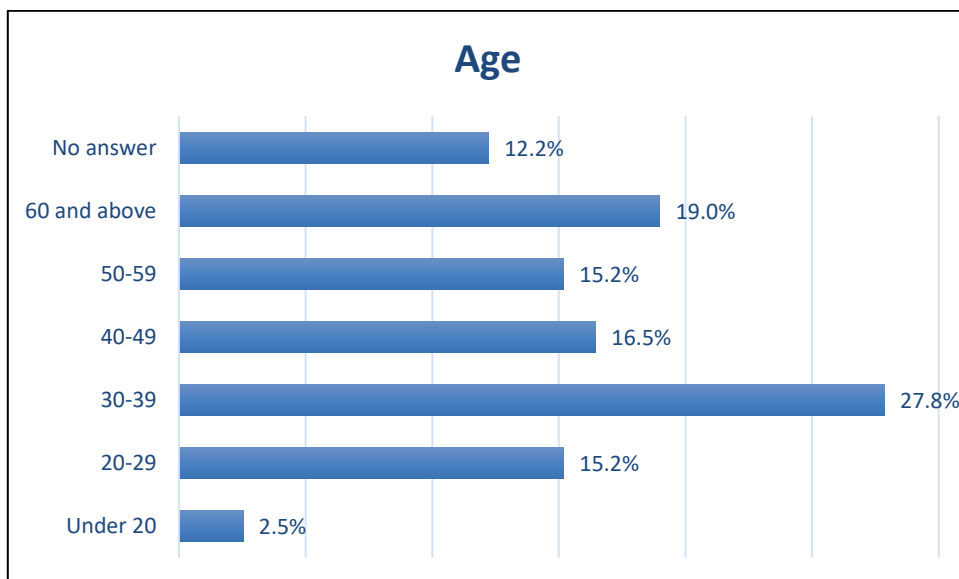
- Tourism education. Consider bringing in consultants to educate businesses (including larger ones) on successful tourism products and embracing a service mentality, how to encourage loyalty from external providers.
- Establish a central contact person who can ask people in peripheral areas what is going on and relay that information to prospective visitors (e.g., through Council website or social media pages).
- Council to provide opportunities for Information Centre staff to visit tourism businesses around the Shire to keep up to date with product offerings, events, promotions so that they can effectively promote the Shire.
- Increased support for small businesses in developing and implementing marketing initiatives aimed at increasing tourist business traffic.

## 5.2 Community Survey Findings

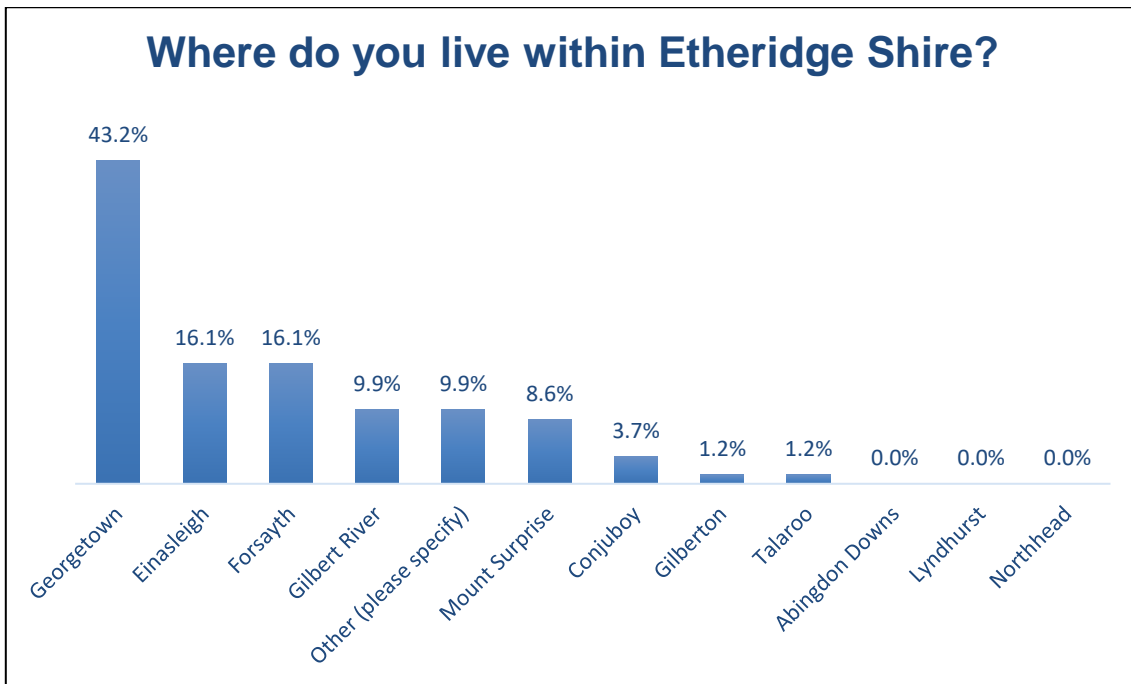
As described in Section 2.3.1, an online survey was distributed to Etheridge Shire residents between January 27, 2022 and May 2, 2022. Residents were invited to participate in the survey via a survey link attached in the Etheridge Shire newsletter and via emails. Within Etheridge Shire’s population, there were a total of 582 residents eligible to complete the survey. **The total number of responses to the survey was 90, representing a 15.4% response rate.** The ensuing sub-sections present the key findings emanating from the community survey.

### 5.2.1. Participants’ demographics

Respondents to the community survey spanned a wide variety of age categories (Figure 5.1). **Just over half of the sample (50.7%) were aged 40 years and above**, whilst a slightly smaller proportion (45.5%) were aged 39 years and under. A sizable proportion of respondents declined to enter this question (12.2%). As such, the sample does not appear to be skewed in favour of any particular age demographic. However, **most survey respondents were female (62%), and were residents of Georgetown (43.2%, Figure 5.2).**

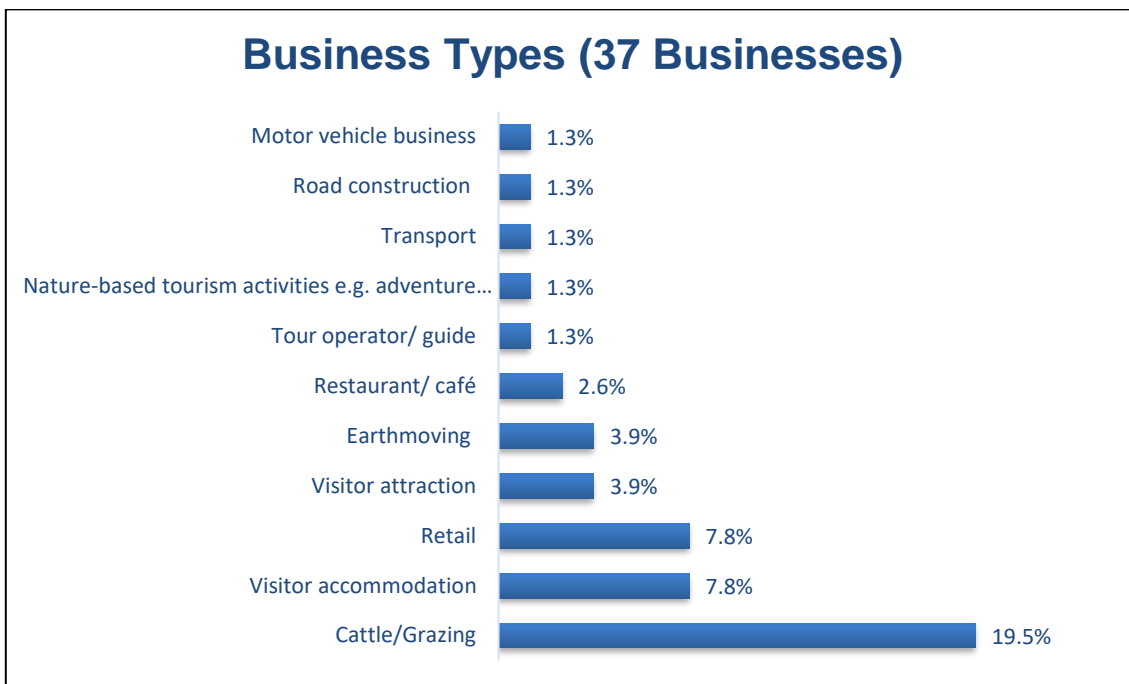


**Figure 5.1 Survey respondents by age category (N=90).**



**Figure 5.2 Survey respondents by location within Etheridge Shire (N=81).**

Amongst the survey respondents, 42.5% ran a business within Etheridge Shire, whilst 57.5% were not business proprietors. Figure 5.3 shows that the sample represents a wide variety of business types, with cattle farming business owners being the most prevalent within the sample (19.5%).



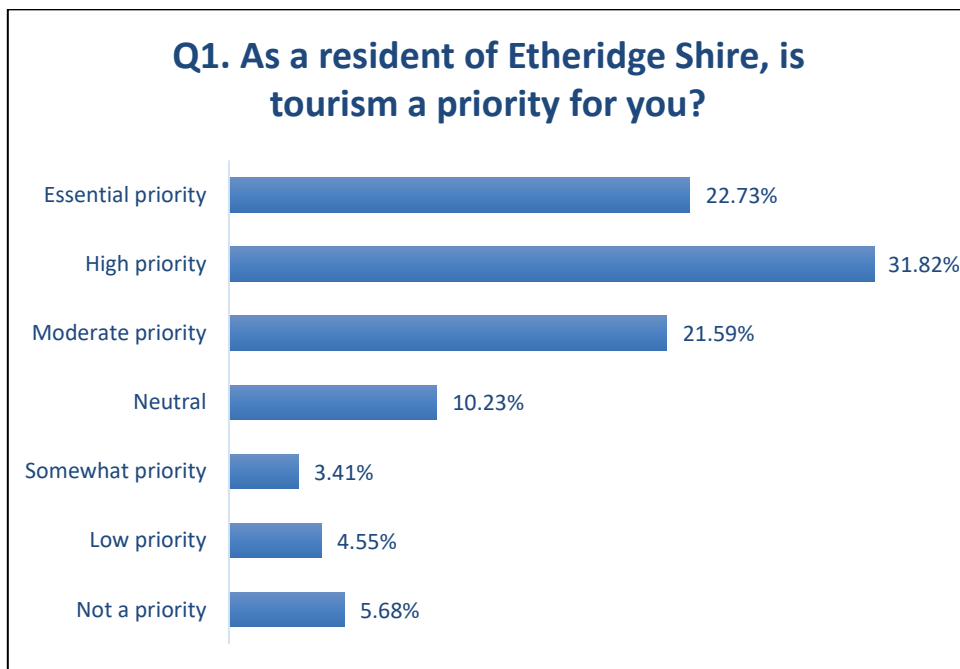
**Figure 5.3 Types of businesses owned by survey respondents (N=77).**

### 5.2.2. Perceived tourism value

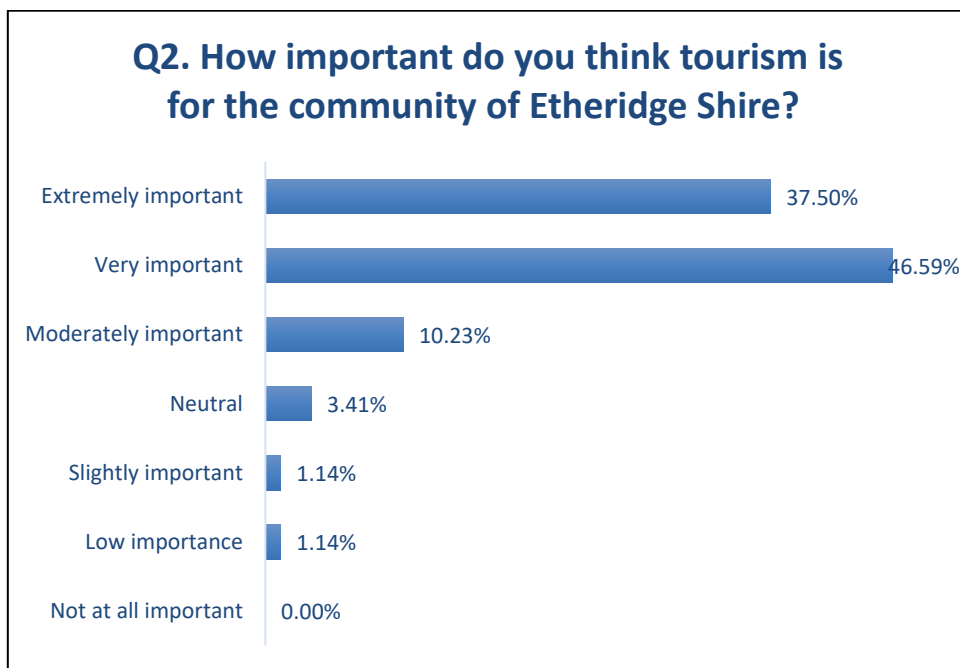
Having presented an overview of the sample of Etheridge Shire residents who responded to this survey, attention is now turned to examining respondents' perceptions around the value tourism generates for the region. When asked if tourism 'is a priority for you', responses were varied (see Figure 5.4). **A clear majority of respondents indicated that they see tourism in Etheridge Shire as a priority, with 76.1% indicating that tourism is either a moderate, high, or essential priority.** However, around one in 10 respondents were neutral, and 13.6% perceived tourism as being a somewhat, low, or not a priority at all.

Similarly, when asked, 'how important do you think tourism is for the community of Etheridge Shire?', **84.1% viewed tourism as very important or extremely important** (Figure 5.5). Again, a small number of respondents (5.7%) were either neutral or did not see tourism as important for the region.

Whilst these findings are indicative of quite strong support for tourism amongst Etheridge Shire residents, it is possible that future tourism development initiatives may encounter some resistance from various factions of the community, who may have not participated in the survey, and further exploration would take such groups into account through specialised consultation with representatives from other economic sectors. It is therefore prudent for Council to seek a wide variety of views from within the community when proposing future tourism development initiatives in order to understand the source of such resistance, and to be able to tailor initiatives to best satisfy the greatest number of residents possible.



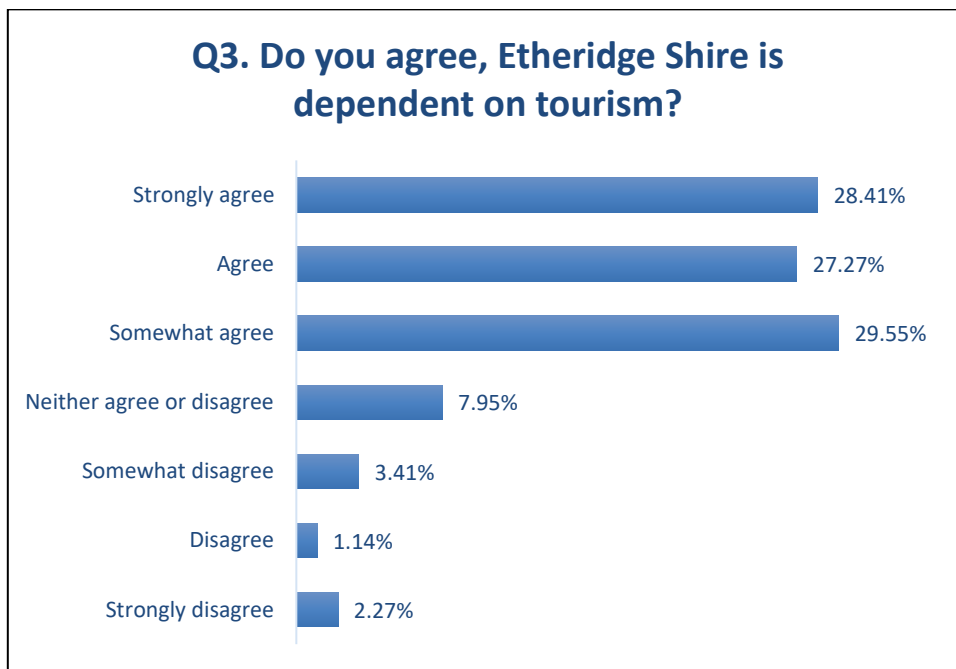
**Figure 5.4 Respondents' perceptions around tourism as a priority for Etheridge Shire (N=88).**



**Figure 5.5 Respondents' perceptions around the importance of tourism for the Etheridge Shire community (N=88).**

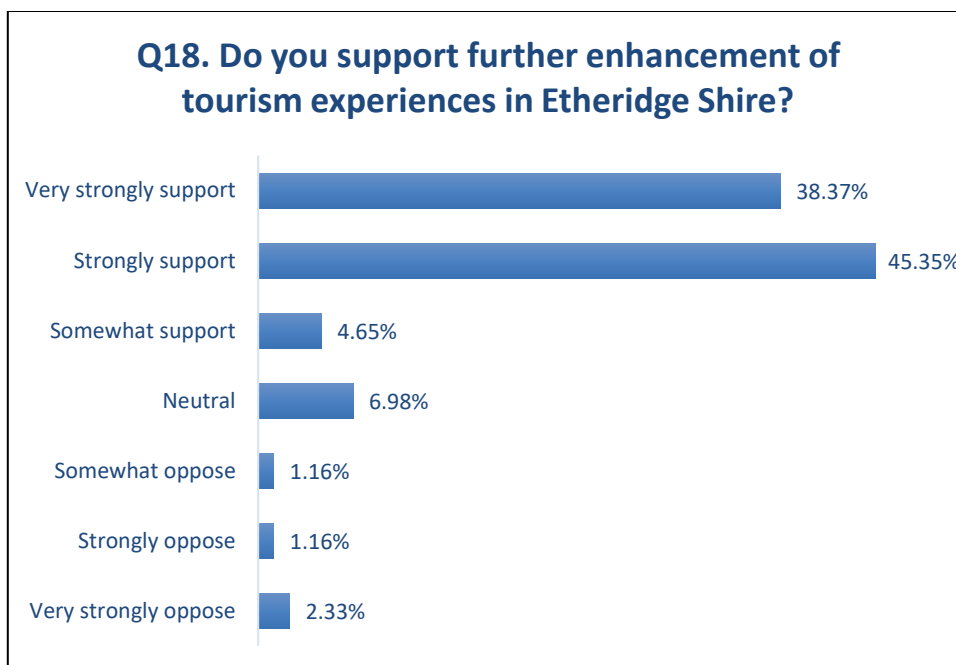
Survey participants were asked whether or not they believe that Etheridge Shire is dependent on tourism as an economic activity. As is presented in Figure 5.6, ***the vast majority of respondents (85.2%) indicated some level of agreement that Etheridge Shire is dependent on tourism.*** In contrast, 14.8% were either neutral in their response or disagree that Etheridge Shire is dependent on tourism.





**Figure 5.6 Respondents' perceptions regarding Etheridge Shire's dependency upon tourism (N=88).**

Survey participants were also asked whether they supported or opposed further enhancements of tourism experiences within Etheridge Shire. Reflecting the patterns observed above, **there was clear majority support with 83.7% of respondents indicating 'strong' or 'very strong' support for further enhancement of tourism experiences** (Figure 5.7). A similar pattern of ambivalence and opposition observed in previous questions was also reflected, with 7% indicating a neutral response and 4.7% being opposed to future tourism enhancement.



**Figure 5.7 Respondents' support for further enhancement of tourism experiences in Etheridge Shire (N=86).**

### 5.2.3. Importance-performance analysis of perceived tourism benefits for Etheridge Shire

Survey participants were asked to consider a variety of common tourism benefits to host communities as identified in the broader tourism research literature. In this context, survey participants were asked to rate each benefit regarding (i) the importance of delivering that benefit to the Etheridge Shire community; and (ii) their perceived performance rating for that benefit currently being delivered to the Etheridge Shire community through existing tourism infrastructure and initiatives.

This approach enables the construction of a 'importance-performance' matrix which assists in identifying existing strengths which should be capitalised upon in future tourism initiatives. The analysis also helps identify potential gaps that should be prioritised for improvement in the future. The tourism benefits which survey respondents were asked to rate included:

- Economic benefits for locals
- Creating jobs and employment
- Conserving culture and heritage
- Quality of life
- Conserving environment and habitat
- Business resilience

Figure 5.8 presents the importance-performance analysis matrix for tourism benefits to Etheridge Shire. This figure demonstrates that ***economic benefits for local residents, building business resilience, and creating jobs and employment were the three most important benefits survey respondents believed tourism should deliver to Etheridge Shire.*** Meanwhile, conserving the environment and habitat, improving quality of life, and conserving culture and heritage were the three least important tourism benefits.

Pleasingly, ***the top three most important tourism benefits (economic benefits, business resilience, employment creation) were rated as performing well in terms of existing tourism delivering those benefits to the Etheridge Shire community.*** All three of those benefits were rated at or above 5.8 on a seven-point measurement scale, and thus appear in the top-right quadrant of Figure 5.8, labelled 'keep up the good work.'

However, ***two benefits, conserving culture and heritage, and improving quality of life appeared within the bottom-right quadrant of Figure 5.8 labelled 'concentrate here.'*** These two benefits are evidently important to local residents, with both scoring well above the midpoint of the important scale (at or above 5.4 on a seven-point measurement scale). The performance of these two benefits presents room for improvement, and should therefore be given due consideration in the development of a Tourism Masterplan for Etheridge Shire.

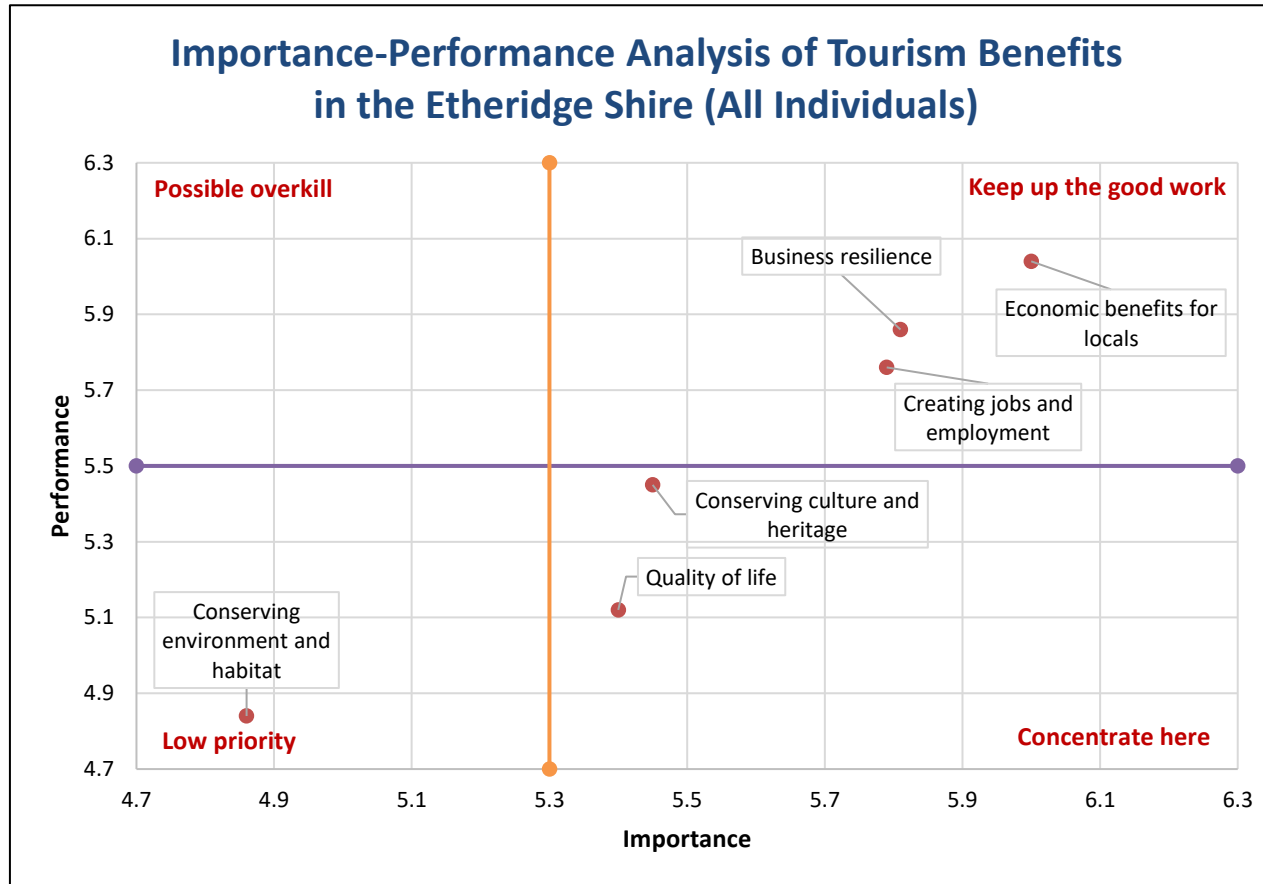


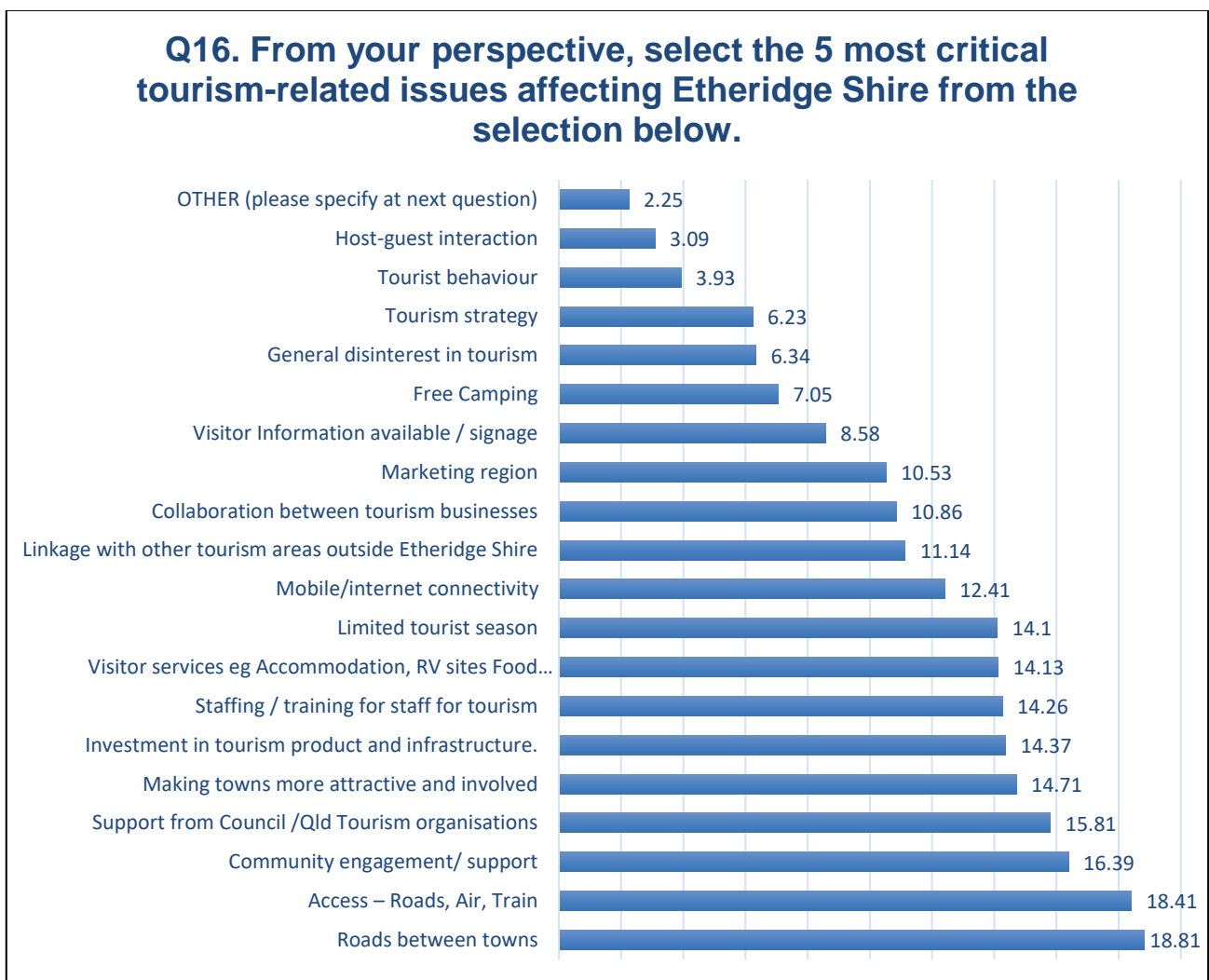
Figure 5.8 Importance-performance analysis of tourism benefits for Etheridge Shire (all survey respondents, N=88).

## 5.2.4. Critical tourism issues in Etheridge Shire

Survey participants were asked to identify issues they believed were critical to foster future tourism development in the region. Respondents were asked to select the five most critical issues from a list of 20. Figure 5.9 presents a ranking of items following analysis while Table 5.1 contains free-text responses.

**Issues around accessibility were the most critical factors in need of addressing.** Respondents identified roads within Etheridge Shire connecting key townships as the most critical item, followed closely by access into Etheridge Shire via road, air and rail. The importance attached by survey respondents to these issues relating to accessibility corroborated findings from the stakeholder interviews.

Other critical issues included encouraging stronger community engagement with tourism issues in Etheridge Shire, along with garnering stronger support for tourism development from Etheridge Shire Council and relevant state-based agencies. Improving infrastructure for visitors (such as beautification, accommodation, food and beverage availability), and upskilling for staff involved in tourism service delivery were then ranked at the same level. Issues of moderate importance included collaboration and communication.



**Figure 5.9 Tourism issues in Etheridge Shire survey participants identified as critical (N=89)<sup>5</sup>.**

<sup>5</sup> Figure 5.9 utilises a ranking score calculated out of 20. High scores on this scale reflect a higher level of importance allocated to an item by survey participants.

**Table 5.1 Other critical tourism-related issues identified by survey respondents (free-text question).**

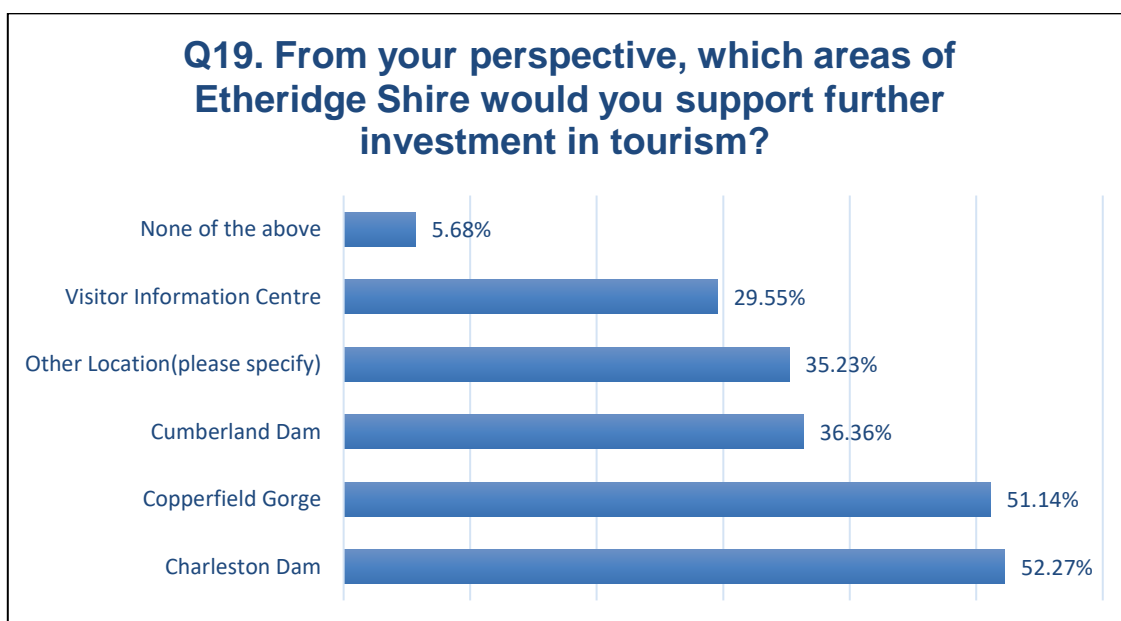
Critical Tourism Issues – Free-Text Responses
The major issue that is raised from tourist when we happen to be talking to them is the mosquito problem in Georgetown. People take their kids to the park and only spend 10min there because the kids get hammered by bites from the mosquitoes. This has to be one of the major issues that needs to be addressed. The caravan parks are filled with mosquitoes at dusk. And the tourists in surrounding towns tell each other about this and people choose to move onto the next town, so they don't get bites all night.
Outback road driving safety
Not enough for people with disabilities to access
When travellers discard rubbish along every roadway and show no respect as far as I am concerned they are not welcome...also I don't believe councils or anyone else has the right to vandalize our natural environment to make a man-made monstrosity to cater to tourist you have it all wrong. If tourist want to see our country it should be as God made it, not as someone who thinks they are God wants it to be...some respect should be shown
Georgetown citizens need to be polite and except they are in tourism. Georgetown has bad name
Promotion as a tourist destination in the Green Season.
Include all tourism not just the purple circle just looks at the Shire's website
Seasonal hot weather in October-March period
Minimizing negative biosecurity issues related to tourism

### 5.2.5. Suggested focus areas for tourism investment

Survey participants were asked to identify which areas of Etheridge Shire they would support for further tourism investment. Participants were asked to select from a set of prescribed options and were also offered a free-text option to identify other areas for tourism investment.

From the list of prescribed options, Figure 5.10 shows that **Charleston Dam and Copperfield Gorge are the most preferred options with 52.3% and 51.1% of respondents endorsing these locations**, respectively. Meanwhile, Table 5.2 summarises the free-text responses provided by survey respondents that proposed many locations that were not listed.





**Figure 5.10 Areas within Etheridge Shire survey respondents support for further tourism investment (N=88).**

**Table 5.2 Summary of free-text responses for suggested areas of further tourism investment.**

Suggested Areas for Tourism Development: Free-Text Responses
Forsayth, potential for a hub and added historical aspects.
O'Brien's Creek Gem Fields
Gem Fields and tourist historical centre, water park for families
Visitor info centre in more than just Georgetown
We need to look at what is bringing tourism to our shire? It's not the towns them self obviously. So there needs to be more support in tourism companies
Undara Lava Tubes
Etheridge river. There needs to be more talks about the possibility of building a weir etc downstream. If there would be more water around Georgetown more people would stay for longer stays.
Agate Creek
Station Stays
Town entrances and appearance
Gilbert river
Mount Surprise
Mt Surprise Botanical Gardens
Kidston Dam and Environs
Cemetery for ancestral tourism and also develop a pioneering families information centre. Also an art gallery featuring local artists
Einasleyh

Mining history, beef industry, beautiful scenery
Leave the Copperfield Gorge alone
Cobbold Gorge
Georgetown Pool - a waterpark for children
Kidston Dam
The Lynd

Experiences are a crucial element of the product mix for any location to be successful as a tourism destination. Although Etheridge Shire currently has a range of tourism experiences which could be leveraged in a future Tourism Masterplan for the region, it is prudent to consult with the local community regarding their perspectives on how the existing catalogue of experiences could be diversified. Survey participants were asked to select from a prescribed list of tourism experiences which they would endorse for future enhancement within Etheridge Shire. Respondents were also offered a free-text option to provide other suggestions (Table 5.3).

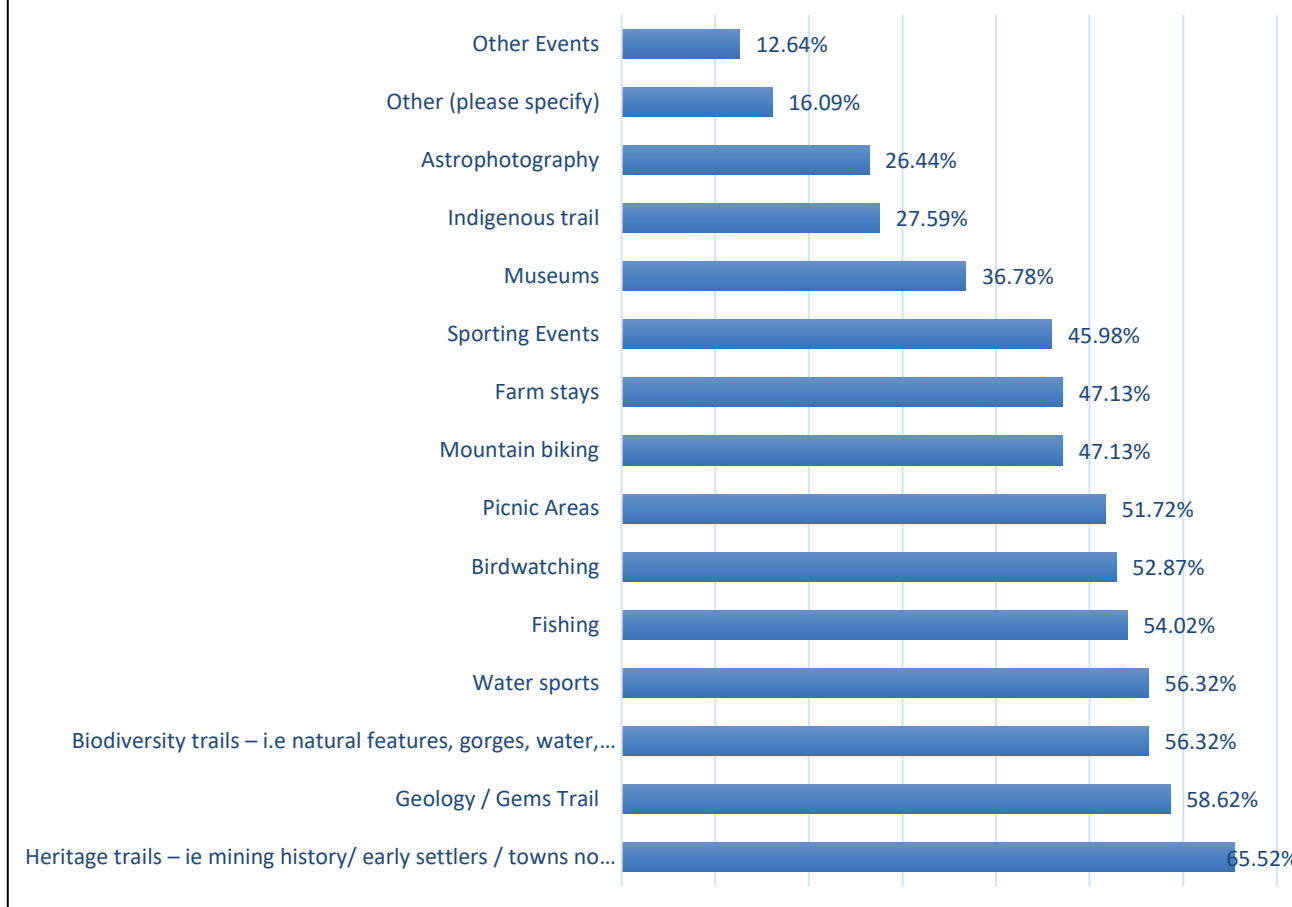
Figure 5.11 shows that there is **broad support for the further development of trail-based experiences showcasing the region's heritage and natural resources. Just over 65% of respondents endorsed heritage-themed trails for development, which was the most strongly endorsed item** from the prescribed list.

There was **also strong support for the development of experiences based around specific activities such as water sports, fishing and bird watching**. Mountain biking was another recreational activity which received strong endorsement (47.1% endorsement). Survey respondents also flagged picnic areas as an opportunity for further enhancement (51.7% endorsement).

**Table 5.3 Summary of free-text responses for suggested tourism experiences.**

Suggested Tourism Experiences; Free-Text Responses
Running events, festivals, sporting events that can be held outside of the tourism season.
Biking events - car shows - fishing events - hiking events/ wheelbarrow race style events
Competitive bike track to Charleston Dam
Bike track, waterpark, bushwalking tracks
Hikes similar to trek west at Mt Isa
Races / rodeo/ balls etc
Camp drafting/Horse Events
Water park, walking tracks with historical events post, art projects reflecting the areas main focus
Ancestry research; art gallery
Free camping destinations
Fossicking

## Q20. From your perspective, what types of tourism experiences would you support further enhancement of?



**Figure 5.11 Areas within Etheridge Shire survey respondents support for further tourism investment (N=87).**

### 5.2.6. Suggested areas of Council support for tourism development

Survey participants were provided with an opportunity to suggest ways through which Council may be able to better support tourism development within Etheridge Shire. A free-text question allowed respondents to articulate their suggestions utilising their own words. A summary of these responses is presented in Table 5.4.

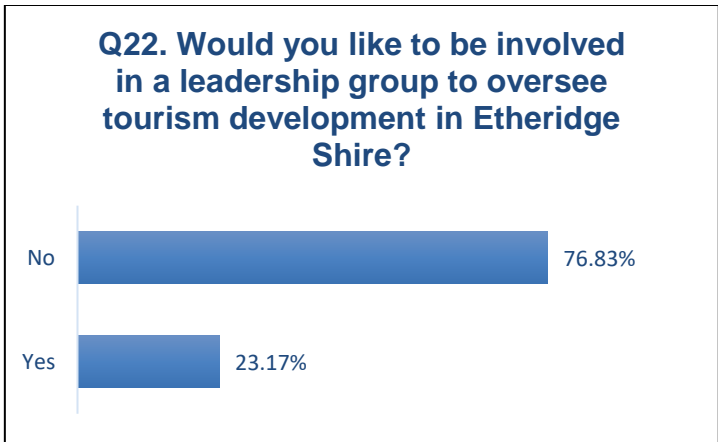
Suggestions for how Council could better support tourism development fell into eight themes:

- Equal support across towns
- Community engagement
- Road access
- Marketing
- Events
- Funding and business support
- Other facilities and infrastructure
- Management and partnership

The themes presented in Table 5.4 are presented in no particular order. No attempt could be made to quantify the responses, and therefore strength of endorsement for each suggestion cannot be established.

Relatedly, in Australia it is common for local government agencies to play a leadership or enabling role in the coordination of local tourism in liaison with community stakeholders. It is therefore natural to presume that Etheridge Shire Council would play a central role within the establishment of a future tourism coordination network for the region.

Survey participants were asked to indicate whether or not they would like to be involved in a future leadership group charged with responsibility for overseeing tourism development in Etheridge Shire. Figure 5.12 below shows that **although most respondents (76.8%) indicated they had no such interest, almost a quarter of the sample (23.2%) were interested in participating in a tourism coordination network in the future.**



**Figure 5.12 Proportion of survey participants prepared to be involved in a future tourism development leadership group (N=82).**

**Table 5.4 Summary of responses: how Council could better support tourism development in Etheridge Shire.**

Theme	Unedited Quotes from Respondents
<b>Equal Support Across Towns</b>	Work on other towns within the Shire not just focus on Georgetown.
	Spread the love between the town's not just focused on Georgetown and the big tourist ventures like Undara and Cobbold Gorge
	Council should support tourist by making all towns be equal with focusing on developing all towns equally
	Follow through and achieve some development outside of Georgetown. Think outside the box and look for something with a difference to attract people to the shire... engage more with smaller towns.
<b>Community Engagement</b>	Make sure the residents are supportive of tourism activities
	Get the community involved, host weekly or fortnightly events that tourist can come to and get involved.
	Listen to locals that live in their community.
	Listen to the people who are already in tourism they know and have walked before you so embrace that knowledge and build on that don't waste money in trying to rein vent the wheel
	Help the community realise the importance of tourism as a whole so that everyone can see it's not just those who own a tourism business that are affected by tourism, it's the whole community.
	Promote ideas to the community on what could be possible new tourism ideas to see what the community thinks and have their input to better the facilities and experiences for both community and tourist.
<b>Road Access</b>	Improve road access between Mt. Surprise and Georgetown. Many tourists complain bitterly about the 'unfinished' sections of this road. Improve signage to Gemfields and road access.
	The main roads need to be a major improvement. The last 6-7km coming into Georgetown from Mt Surprise is shocking. This is the entrance onto our town and yet there are massive holes in the road. More pressure is required to get the road up too standard before another fatal accident occurs
	I think that we need to prioritise the roads in our region. Getting the main access roads to be all double lane bitumen and then working on bitumen to attractions like Cobbold. It is dangerous for unexperienced caravans to travel on these roads and that puts locals at risk as well. Another access issue that hires cars are not able to go past Georgetown so better roads and working with these companies may mean that more tourists are able to access our region.
	Upgrading single lane roads to make getting to the Etheridge Shire easier
	Also, the dirt roads to Cobbold Gorge are poorly maintained. This needs to be regularly maintained.

Theme	Unedited Quotes from Respondents
<b>Marketing</b>	Market the region and its benefits
	Try and find a way to not only attract elderly folk but the young folk as well
	Boost information about the area that isn't just about Cobbold Gorge or Undara
	Promotion of the Shire and investment into beautification and upkeep of all towns.
	The shire needs to advertise the fact that we have a ring road through all our tourist places
<b>Events</b>	Have more events, i.e., concerts, markets, culinary and wine events to bring surrounding shires to our community.
	Create some sort of event to attract a crowd
	Assist in the promotion of regular events for tourists. A good local calendar in a central spot e.g., social media page.
	When upgrading facilities why can't we look at events that can be held outside of tourism months because the tourists that are coming to our local towns are going to be there anyway and support our towns. So, looking at attracting a whole new group of people such as events like a triathlon would bring in a whole new group of people which wouldn't have to run in our season it can be run outside our season and local businesses can thrive of them in there quieter months.
<b>Funding and Business Support</b>	Have more people trained in this area especially on the history of the towns. I think a botanical garden would be good.
	Offer assistance to small communities to enable more tourism related infrastructure
	Direct and assist local tourist businesses to access grants; enhance the look of the towns and surrounds, upkeep roads
	Funds are limited. The support through grant application and advocacy is the strength
	Work with and support all local operators
	Giving support to tourism companies and backing them up.
	Seek state government funding. Create a vision for the shire.
	By being the people's voice when wanting funding from government. Holding workshops to help tourism businesses diversify  Speaking for the Progress Association of Einasleigh, help applying for grants to install sporting facilities to attract visitors. Any grants at all really. Also make our roads more accessible. We lose so many customers due to road conditions. Help with accessing funding to complete research of our town history.



Theme	Unedited Quotes from Respondents
	Encourage small tourism operations such as farm/station stay
<b>Other Facilities and Infrastructure</b>	Start to spend some money in Mt Surprise to enhance the street appeal
	Focus on and industry - i.e., mining history and invest in showing how it all worked, guided tours, have a cafe to come back to after tours. Run buses to local scenery.
	Better signage/information centres in Etheridge Shire
	Run an effective and user-friendly VIC
	Better the mobile phone communication to all areas especially out to Cobbold Gorge. Next to no service out there.
<b>Management and Partnership</b>	Have an effective tourism strategy
	Coordinate strategy, advocate on behalf of industry and invest in its own tourism products (enhancement and promotion)
	Constructing and then implementing a master plan for future development within the shire.
	Partner with Savannah Way, the LTO for our region. We miss out because Council refuses to contribute as a member.
	Works both ways providers need to support Council too

## 5.2.7 General community perspectives on tourism in Etheridge Shire

To round out the community survey, participants were provided with an opportunity to express in their own words any other general views they hold regarding tourism within Etheridge Shire. The viewpoints expressed by survey participants are summarised in Table 5.5 (overleaf).

The views of survey participants were summarised into 10 recurring themes:

- Value of tourism
- Tourism development
- Marketing and branding
- Road access
- Seasonality
- Support to other industries
- Other infrastructure
- Spreading tourist expenditure
- Management and partnership
- Community engagement

The themes presented in Table 5.5 are presented in no particular order. No attempt could be made to quantify the responses, and therefore strength of endorsement for each suggestion cannot be established.

**Table 5.5 Summary of survey participants' general perspectives on tourism in Etheridge Shire.**

Theme	Unedited Quotes from Respondents
<b>Value of Tourism</b>	I feel that many residents underestimate/undervalue tourism in the shire. Many deny the value added by tourists spending time and money in the shire.
	It is the only thing keeping our towns running
	Tourism is a huge part of Etheridge Shire and I think it needs to be taken more seriously by the Council.
	Etheridge Shire has primarily been an agricultural area, however in years past with cattle prices and land taking a hard blow, tourism has been a major contributor in keeping small towns alive and some properties a chance to diverse when their main income was struggling.
<b>Tourism Development</b>	There is excellent potential for the development of tourism in Etheridge Shire
	Need more attractions for tourist to keep them in the local towns to encourage tourist to stay longer
	So many natural features are not being utilised.
<b>Marketing and Branding</b>	I think our shire/region profile as a recognised tourist destination needs to be elevated
	I would like to see more signage and promotion of the Copperfield however the gorge itself MUST be left untouched. I would like to see more input and interaction from local businesses with the information centre. There needs to be an overflow for visitors when the parks are full. I struggle with free camping but it seems to be what needs to happen. I would like to see a new brochure promoting the Etheridge Shire and all it has to offer. The VIC needs its own coffee shop/cafe - a lot of the buses only call at the centre and then leave town.
<b>Road Access</b>	Main two views are the roads and the mosquitoes in Georgetown. These are the major talking points that tourists have talked to is when we have been travelling around.
	It wrecks roads that aren't maintained frequently enough
	Road sharing and road safety
	One point I would like to make is about the blocks in town that are not looked after. Not only are they a fire hazard but they also look terrible to everyone who visits. The owners of these blocks should be made accountable and made to keep them mowed and clean. We would also like to see blocks in town made available as there are so many people who want to buy here. If we can grow our town we can create more jobs and attract more tourists
<b>Seasonality</b>	I believe our towns thrive on the tourist season, our local businesses would not continue without it. Take for example how in the off season many businesses shut or have limited services and hours. The permanent population is not sustainable for the businesses.

Theme	Unedited Quotes from Respondents
<b>Support to other Industries</b>	It is not everything. Cattle stations are the backbone of the shire. Tourism is important but more support needs to be given to station owners
	We need to remember never to make the tourist dollar the main stay of the shire. We need to keep our existing business up and running.
	An important sector within the shire supporting the other big industries of grazing and mining. Promotion of any remaining historical sites/trails that still have something for tourists to view/read/photograph
<b>Other Infrastructure</b>	Relevant signage on approaches to our communities. no private signs in the township. there are enough gov. railway speed etc to confuse.
	Need 100% mobile coverage in the Etheridge shire
	Presentation of the town, signage, weed control, water/splash park, sporting events....
	Advocate for increased rest areas and toilet facilities to be constructed along our major transport and tourism corridors across the shire.
<b>Spreading Tourist Expenditure</b>	The Shire has a lot to offer tourists, but it is generally left to a few private individuals generate the tourist dollar which is predominantly spent at those features. We need more to be done in the outer Shire areas to encourage the tourist to stay within the Shire longer.
	Mt Surprise is forgotten by the Council.
	Einasleyh has finally become a tourist destination, and not just for the gorge. Any help to attract more visitors is very welcome.
<b>Management and Partnership</b>	Have dedicated and paid tourism position/s and a support officer. Have extra guides and run buses and local experienced people to demonstrate and show them what we have. Have somewhere comfortable to stay and dine during the day also. E.g., handmade foods and coffees, lunch at a cafe at information centre. Offer free camping down at the Etheridge River in a selected location with local sports, clubs and groups to entertain and cook for to raise money during the tourist season.
	Involve the tourism staff more with getting to know what is being talked about as tourist come through the centre at the terrestrial
	I have found if you are not in bed with TTNQ or like groups you get no support, so our shire has done nothing for the local businesses
	Its impetus is strong, has developed a long way on its own throughout the years as individuals without any real culminate joint efforts or strategies between all the private tourism groups. The willingness and devotion from repeat seasonal domestic visitors like grey nomads has kept it a constant rhythm for 30 years I've been alive.
	There is so much opportunity if we work together. Let's get our boots on!
	We live in a beautiful region so many natural wonders, maybe we need more people to become tourism providers to give tourists the whole experience of Etheridge not just the big 3.
	Would like to see industry collaboration rather than rivalry and competition amongst operators.

Theme	Unedited Quotes from Respondents
<b>Community Engagement</b>	If you are pushing for tourism, just remember the locals were here first...
	Listen to rate payers
	The Etheridge Shire has lots of natural experiences to offer visitors which would be enhanced by tours, however it is not up to Council/ratepayers to provide this service, it requires private investment. Council can assist by providing reasonable access (roads).

# 6. DESTINATION COMPETITIVENESS ANALYSIS OF ETHERIDGE SHIRE

Destination competitiveness refers to the ability of a destination to deliver tourism experiences better than other competitors on aspects that are considered important by visitors, or in a way that is differentiated from competitor destinations' offerings. The competitiveness of a destination is determined by the ability to attract visitors, increase expenditure (and enhance the wellbeing of the local population) and do the above while ensuring its viability in the future.

Destination competitiveness is measured using objective indicators, including visitor numbers, market share, tourist expenditure, employment, GDP and value added by the tourism industry, as well as subjective indicators such as visitor perceptions (e.g., attractiveness, quality of tourism experience, etc.). In the context of remote locations such as Etheridge Shire, the end goals of becoming a competitive destination are to:

1. Transition the economy by integrating tourism into the existing mix of dominant economic activities, particularly mining and agriculture;
2. Improve the quality of life and economic wellbeing/prosperity of local residents; and
3. Promote sustainable tourism development.

As illustrated in Figure 6.1 (overleaf), the key determinants of destination competitiveness are *core resources*, *destination management*, *situational conditions*, and *demand*. These concepts will be explained in the ensuing sub-sections alongside analysis specific to Etheridge Shire.

## 6.1 Core Resources

Endowed and created resources constitute the characteristics that make a destination attractive whereas supporting resources provide the foundations for a successful tourism industry.

### 6.1.1 Endowed resources

Endowed resources relate to inherent elements or advantages that a destination possesses, and include two categories: (1) natural, the physical attributes of a destination such as landscape, climate and fauna and flora; and (2) heritage, including history, food and wine, and cultural traditions.

#### Competitive Analysis for Etheridge Shire: Endowed Resources

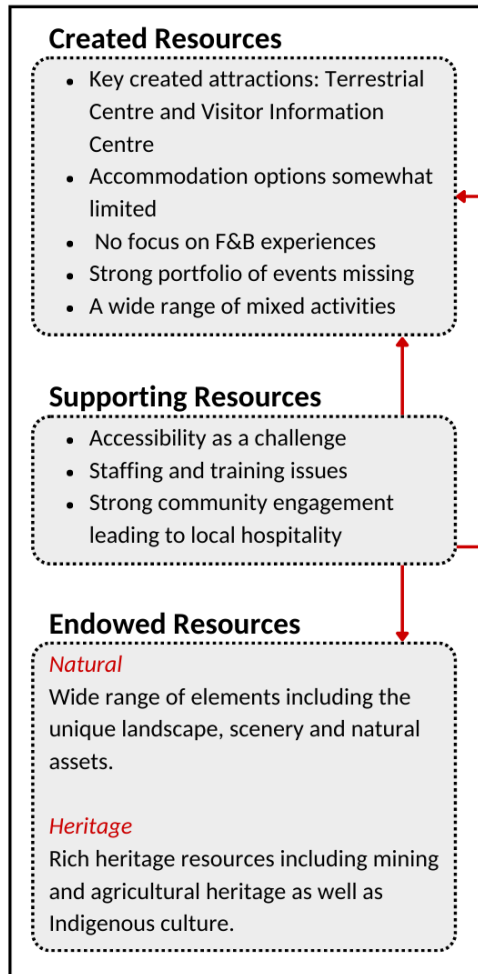
The Unearth Etheridge emphasises natural resources as core tourism attractions for the region. Geological features including 'lava tubes, gems and gorges' are important taglines promoted on the campaign web page. Natural resources are a major strength of Etheridge Shire including the unique landscape and scenery, other natural assets such as attractive gorges and hot springs, alongside wildflowers and diverse birdlife. Etheridge Shire's heritage resources include mining and agricultural heritage as well as Indigenous culture. Although these endowed resources underpin a level of distinctiveness for the region, our analysis suggests that these resources alone are insufficient to generate visitation given significant existing gaps in other tourism infrastructure and supporting resources.



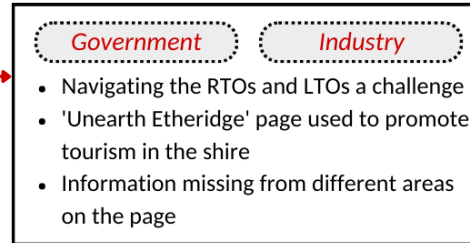
(Image 1: R. Haase; Image 2: B. Newton; Image 3: Unearth Etheridge)



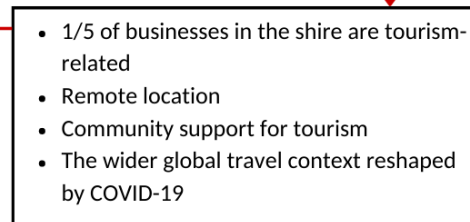
## Core Resources



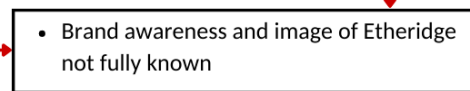
## Destination Management



## Situational Conditions

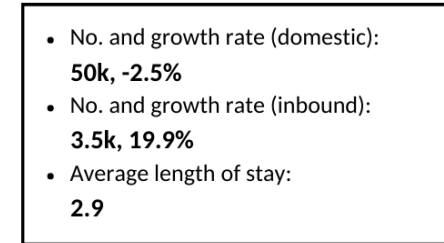


## Demand



## Destination

### Competitiveness Indicators



## Destination Competitiveness

Figure 6.1 A framework for Destination Competitiveness applied to Etheridge Shire (Dwyer & Kim, 2003).

## 6.1.2 Created resources

Created resources are crucial in determining a destination's competitiveness. Created resources include tourism infrastructure (e.g., accommodation facilities, food services, transportation facilities, themed attractions, tour operators, travel agents etc.), events and festivals, a range of available tourism activities, entertainment, and shopping. Broader research in tourism suggests that the quality of a destination's tourism infrastructure is a key predictor of perceived quality and value amongst visitors and prospective visitors. As such, it is vital that a region's tourism infrastructure meets market expectations if a destination is to develop sustainable competitive advantage.

### Competitive Analysis for Etheridge Shire: Created Resources

#### Visitor accommodation

Etheridge Shire's existing accommodation facilities currently span campgrounds, caravan parks, hotels/motels and farm stays. The one exception is Gilberton Outback Retreat, which is the only luxury accommodation in the region. There are also three unofficial informal camping sites located throughout the Shire. However, the absence of Gilberton Outback Retreat on the Uneath Etheridge web page nor in the Shire business directory is reflective of a fragmented approach to tourism promotion which will need to be addressed in future.



(Image 1: N. McNeil; Image 2: E. Rigg; Image 3: G. Cole)

There is a lack of low- and mid-range budget accommodation options within Etheridge Shire which constrains the region's ability to target segments such as youth travellers, working holiday makers and other budget-conscious visitors. However, Etheridge Shire is well-placed to leverage the lucrative caravan and RV market due to the availability of vehicle-based accommodation facilities across the Shire.

#### Food and beverage services

Food and beverage services are available throughout Etheridge Shire, although these are currently limited to 10 restaurants, taverns, and shops. It is possible that future tourism growth could be constrained by these limited options. Relatedly, food-related visitor experiences are not featured on the Uneath Etheridge website. Given the importance of quality food amongst many visitor segments, there is an opportunity to promote existing offerings within the Shire through a more coordinated approach to tourism marketing.

#### Tourism attractions and experiences

The primary created attractions in Etheridge Shire include the TerrEstrial Centre and Visitor Information Centre. The Savannahlander train that departs from Cairns is another created resource that offers unique rail holiday experience to various destinations within Etheridge, including Forsayth, Einasleigh, and Mount Surprise. However, the Savannahlander experience is not promoted on the Uneath Etheridge website, whilst it is featured on the Tourism Tropical North Queensland website. There is potential to better integrate this unique rail experience into Etheridge Shire's destination brand positioning, particularly as a strategy for leveraging the region's heritage and landscape features.



(Image 1: Etheridge QLD; Image 2: T. Richards)

The existing tourism experiences in Etheridge include heritage walks, fossicking, bushwalking/hiking, bird watching, mountain biking, bathing in hot spring, and some water-based activities. Whilst these existing experiences provide a foundation for stimulating visitation to the region, opportunities exist to develop a broader range of experiences, such as heritage trails with co-created elements, based on market demand-side intelligence and tourism-based business capabilities within Etheridge Shire. Expanding the range of tourism experiences may have the dual-sided benefits of attracting different visitor segments and encouraging a longer length of stay within the region.

### **Tourist shopping**

Opportunities exist for souvenir shopping to augment existing tourism experiences. Although the importance of souvenir shopping varies across visitor market segments, shopping for souvenirs and local products allows visitors to relive memorable experiences post-visit. Well-curated memorabilia and other tangible objects present an added benefit of enabling visitors to share their experiences with other potential visitors. Shopping also provides a platform to showcase local arts and crafts thereby creating entrepreneurial and job opportunities.

### **Events and festivals**

An important category of created resources is events and festivals. Events and festivals are often used by regional locations to stimulate visitation and smooth out tourism seasonality. Currently, Etheridge Shire lacks a strategic portfolio of organised events and festivals. Although the Unearth Etheridge website promotes upcoming events in the region, this website offers limited information to prospective visitors such as date, time, location and cost. The website lacks images and descriptions of the region's existing events, and information is usually limited to events taking place in the near future.

Most of Etheridge Shire's existing events appear to be small-scale and operated at a community level. An opportunity exists to develop a more strategic approach for an events portfolio catering for distinct market segments at different times of the year. Doing so may assist in smoothing out tourism demand over time. Opportunities also exist to strategically leverage major events held in other North Queensland centres such as Cairns. The presence of interstate visitors already present in North Queensland for major events such as the Cairns Festival and Ironman Cairns offers opportunities to attract interstate visitors for complimentary event experiences in adjacent regional areas such as Etheridge Shire, with lobbying for international adventure races a distinct future possibility.

It is worth noting that the extent of required tourism infrastructure development in the future will ultimately be determined by the forms of tourism Etheridge Shire intends to develop, alongside the preferences of target market(s). Rigorous demand-side research is needed to understand tourism infrastructure gaps in need of addressing through future tourism investment.

## **6.1.3 Supporting resources**

Supporting resources underpin destination competitiveness and include general infrastructure, accessibility, quality of service, hospitality, and market ties.

### Road access

Accessibility is another integral dimension of destination competitiveness, with key indicators being frequency, ease and quality of transportation systems, safety concerns, comfort levels, and journey time. Most visitors arrive in Etheridge Shire by road. The location of Etheridge Shire is an inherent constraint due to long journey times from major coastal centres such as Cairns.

As frequently identified through community consultation, travel within Etheridge Shire is problematic due to the condition of roads connecting major townships within the Shire along with local roads providing access to places of tourism interest. The community widely perceives road quality as a significant impediment to tourism development within the region, however notes conditions are improving.

### Essential services

There are gaps in essential services required by visitors to Etheridge Shire. These gaps are particularly observable during the tourism low-season with few service stations, food outlets, grocery stores and other amenities available for visitors. Service gaps in Etheridge Shire also exist, with no permanent health service, hospital, doctor, hairdresser, or vet services in the Shire. Assuming that the Etheridge Shire economy is sufficiently stimulated in the future through strategic tourism development and promotion, it is possible that these current service gaps could present private sector entrepreneurial and/or public sector investment opportunities.

### Air access

Despite featuring four airstrips, Etheridge Shire lacks commercial air services to the region. However, should future tourism investment substantially drive growth in visitation to the region, a business case for modest commercial air services may emerge. In the meantime, there may be merit in negotiating with small, private operators to offer ad hoc, bespoke transport packages to the region. The current lack of hire car services in the region may need to be overcome if this approach is to be viable.

### Rail access

Etheridge Shire also possesses a valuable rail link from Cairns. However, the existing *Savannahlander* service is not a viable means of leveraging this rail link to drive growth in visitor numbers. An expedited service from Cairns could assist in opening up other visitor segments such as interstate and/or international tourists who lack the means or interest in self-driving to remote locations such as Etheridge Shire. Implementing a more expedited rail service would require significant investment in suitable rolling stock and possibly upgrades to the railway itself, hence the business case for doing so may not be viable until demand for visitation to Etheridge Shire grows substantially. Nevertheless, more flexible and cost-effective transport links from major centres could be explored such as coach services.

### Community engagement

Hospitality, or friendliness of the local community towards visitors is another important supporting resource capable of fostering destination competitiveness. Garnering resident support for tourism development can be achieved through community consultation in the development stage and continuous monitoring of stakeholders' attitudes towards visitors and tourism development in the destination. However, data gathered through community consultation suggested that community engagement currently detracts from growing tourism in Etheridge Shire. There was a recurring view that some residents are hostile towards tourism whilst others felt that the wider community lacks skills in engaging with visitors to make them feel welcome. Issues relating to staff retention and service delivery were also identified as potentially undermining the quality of tourism services and experiences within the region.

Given the community engagement issues identified above, community consultation also identified a need for initiatives aimed at improving tourism service quality across Etheridge Shire as a whole. For example, establishing

standards for tourism service providers, products, and facilities; offering educational programs (e.g., training, service delivery workshops) to support achieving prescribed standards; and monitoring performance.

Lastly, market ties include social and economic ties with key tourist origin markets, sectors, and other tourism destinations. Visitation to Etheridge Shire is inherently linked with tourism to Cairns, Townsville and the Savannah Way. As such, there are opportunities to further strengthen market ties with other destinations in the region through a regional collaborative approach. In particular, Etheridge Shire could strengthen its collaboration with destinations along the Savannah Way to create a strong, distinctive regional brand and associated tourism experiences en route.



(Image 1: W Langford; Image 2: Etheridge Shire Council; Image 3: C. McKillop)

## 6.2 Destination Management

In the context of destination competitiveness, destination management considerations encompass five activities: destination marketing management; destination planning and development; destination management organisations; human resource development; and environmental management. Overall, effective destination management can enhance the appeal of the endowed and created resources, strengthen the effectiveness of the supporting resources, and foster adaption to the challenges and opportunities induced by situational conditions.

### Competitive Analysis for Etheridge Shire: Destination Management

Etheridge Shire is known as 'the golden heart of the Gulf' for its geographical location and gold rush and mining history. In terms of destination marketing, the Unearth Etheridge website is a clear effort of promoting the destination, consisting of four townships (Forsayth, Georgetown, Einasleigh, and Mt Surprise) as a whole with various tourism attractions. The strategy of branding Etheridge Shire as a tourism region encompassing several sub-destinations helps set the region apart from neighbouring local government areas, however, presents the risk of a diluted brand.

An Internet image search for the keyword combination 'Etheridge' and 'Australia' led to results mostly connected to Etheridge Ridge in New South Wales. When the keyword combination was changed to 'Etheridge' and 'outback' the results included images that feature the natural scenery as well as the range of activities promoted in Etheridge Shire. Searching for individual townships within Etheridge returned more relevant results on Google, TripAdvisor and Twitter. Further, 'Unearth' emerges as a common brand in this region. For instance, the tagline of Visit Charters Towers is 'Unearth Our Secrets.' A museum in Cloncurry named 'Unearthed Museum', further undermines Etheridge Shire's branding strategy.

### 6.2.1 Creating synergies between relevant RTOs and LTOs

In Australia, destination management is influenced by often complex relationships between various statutory and community-led organisations with an interest in tourism coordination and promotion. State, regional, and local tourism organisations develop strategic plans for tourism and oversee the allocation of public resources intended for tourism promotion.



### Regional level

A critical challenge associated with marketing Etheridge Shire lies in the Regional Tourism Organisation (RTO) Etheridge is classified under. Whilst Etheridge Shire's natural environment and tourism experiences are more akin to outback tourism experiences and have been promoted as such, Etheridge Shire is classified under the 'Tropical North Queensland' category according to Tourism and Events Queensland (TEQ) rather than the more suitable category of 'Outback Queensland.' This peculiarity presents a significant challenge to destination branding and governance.

Under the TEQ classification framework, Tropical North Queensland emphasises the Great Barrier Reef and tropical rainforest experiences, which are not reflective of product offerings in Etheridge Shire, aside from Undara and Talaroo. This existing classification risks Etheridge's tourism branding being side-lined by the Tropical North Queensland brand and further strategic discussion is required to navigate this situation.

Further, the RTO in TNQ is Tourism Tropical North Queensland (TTNQ). TTNQ offer various membership levels ranging from \$200 to \$20,000 per financial year. Several tourism businesses in Etheridge Shire, including Talaroo Hot Springs and Undara Experience are 'Partner of Tourism' (\$1,150) members of TTNQ. Notably, 66% of TTNQ's membership revenue comes from the Cairns region, which helps explain why outback experiences (only accounting for 1%) are sidelined (TTNQ, 2021). At the time of drafting this directions paper, the region had been renamed from Tropical North Queensland to 'Cairns and Great Barrier Reef' region on the TEQ and TTNQ websites, further compounding problems with the fit of Etheridge Shire into this tourism coordination and promotion framework.

At present, Etheridge Shire is branded under 'Gulf Savannah & Outback' on the TTNQ website. On the same website, Etheridge Shire carries the tagline 'Discover Where the Outback Meets the Sea.' The outback experience in this sub-region, however, is overshadowed by TTNQ's spotlight on reef and rainforest experiences. The 2021 Tropical North Queensland Destination Plan identifies several challenges faced by the region including fragmentation and diversity of agendas among stakeholders as well as communication and collaboration issues between them. These issues further highlight the difficulties that Etheridge Shire faces in deriving benefits from the current classification structure.

### Local level

At the local level, Savannah Way Limited is the key Local Tourism Organisation (LTO) leading marketing and destination development services for destinations along The Savannah Way. There are various membership categories, among which the best suited categories for government agency/council would cost from \$500 pa to \$900 pa. Etheridge Shire is currently not listed as a member on the Savannah Way LTO website, however, several tourism operators such as Undara Experience and Cobbold Gorge are members. Some adjacent shires appear to be actively involved in the LTO, with Croydon Shire being the funding partner and Mareeba Shire Council the 'gold' member.

Additionally, Gulf Savannah Development (GSD) is another key organisation in the Gulf Savannah Region. GSD's main role is to drive economic development strategies and projects and serve as a central representative body for businesses and organisations in the region. The membership fee for Council costs \$30,000 per year. GSD's remit extends beyond destination marketing and tourism development, although the organisation does make contributions to certain tourism initiatives. Tourism-related projects undertaken by GSD have included a tourism survey, regional branding strategy, and the development of a farm stay manual (Gulf Station Stay Manual 2020).



## 6.3 Situational Conditions

Situational conditions refer to prevailing external conditions which may enhance or mitigate the competitiveness of a destination. While not under the direct control of a destination, these elements can be adapted to. Situational conditions factors include the competitive (micro) environment, destination location, macro environment, price competitiveness, and safety/security. From a macro perspective, the external environment is subject to constant evolution that may affect destinations and require them to adjust in order to maintain their competitiveness. The external forces that can shape a destination can include political, economic, demographic, technological, natural and cultural factors.

### Competitive Analysis for Etheridge Shire: Situational Conditions

#### **Competitive environment: Lag in uptake of digital business practices**

In terms of its competitive environment, the performance of Etheridge Shire as a destination depends on the tourism industry's overall structure. Etheridge Shire's business directory shows that shire hosts 105 businesses of which 24 are within tourism and hospitality. Several of these businesses do not seem to be digitally ready, with no functional website. All businesses servicing tourism within Etheridge Shire need to be encouraged and supported in the uptake of digital business practices aimed at providing prospective visitors with key information, and harnessing technology in enhancing visitor experiences on the ground.

#### **Destination location constraints**

Distance from source markets is a crucial factor in the decision to select a destination. As noted in Section 4.6, the geographic origin of most domestic visitors to Etheridge Shire is regional Queensland. Etheridge Shire's remote location, coupled with road access issues within the shire itself represent significant challenges for attracting domestic visitors from Southeast Queensland and other states as well as for the international market.

#### **Macro environment: Essential service gaps**

Despite these challenges, Etheridge Shire has numerous situational conditions which it is able to leverage in its favour. The shire currently benefits from a favourable political environment and positive sentiment from a majority of the community towards future tourism development. Community survey findings reported in Section 5.2 constitute robust evidence in this regard.

If Etheridge Shire is to seize opportunities to invest in tourism development presented by this favourable political environment and community sentiment, it must look to overcoming challenges presented by labour constraints. Etheridge Shire's prevailing demographics, future projections regarding an ageing population (Etheridge Shire Council, 2020), alongside population retention challenges may further adversely affect the ability of local businesses to secure necessary labour. If labour supply constraints are not addressed, this may hamper Etheridge Shire's tourism development aspirations.

Relatedly, challenges associated with gaps in essential services such as residential accommodation, health care and telecommunications, if not addressed in the near future, may continue to encourage emigration from the region, constrain labour supply, and hold back tourism development.

#### **Macro environment: The 'new normal' of tourism**

Lastly, there is no doubt that the wider global tourism market has been reshaped by COVID-19. Visitation patterns, both international and domestic, have changed drastically and no tourism destination has been immune from the pandemic's impacts. The remoteness of Etheridge Shire and its connection to nature can be positively leveraged in the 'new normal' of tourism. Additionally, increasing consumer demand for more sustainable tourism practices and experiences represents an opportunity for Etheridge Shire to differentiate itself.

## 6.4 Demand

Demand is a fundamental dimension of competitiveness as ultimately it is the visitors who determine how attractive and competitive a destination is, depending on their travel motivations and preferences. Demand conditions include three elements: awareness, perception and preferences.

### Competitive Analysis for Etheridge Shire: Demand

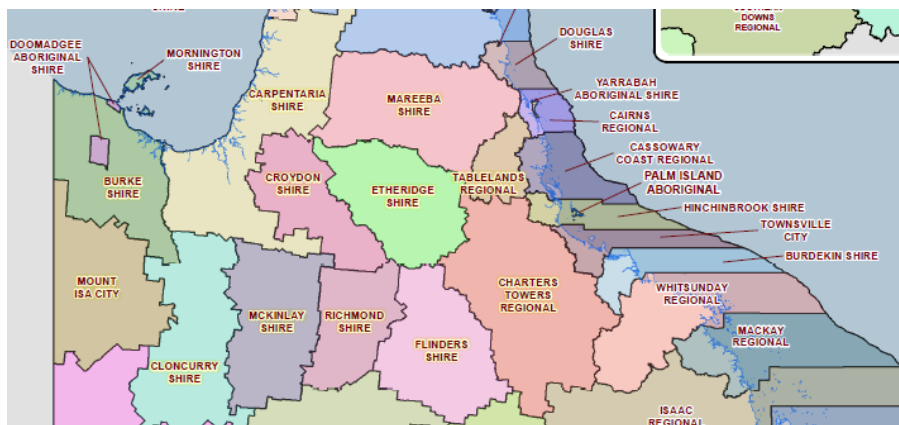
Key information and figures regarding tourism demand and visitor behaviour for Etheridge Shire are reported in Section 4.6. However, there is currently no detailed understanding regarding awareness of Etheridge Shire as a destination among prospective visitors. The gradual increase in visitor numbers and the extending average length of stay reported by Tourism Research Australia does suggest that there is a growing awareness of the region.

Importantly, there is currently a lack of data regarding visitor flows to and within Etheridge Shire. There is also a lack of demand-side data regarding visitor's satisfaction and preferences. To enable prudent future tourism development, it will be critical that these demand-side data gaps are addressed. Not doing so presents a significant risk of undertaking tourism investment and development that does not align with market preferences.

## 6.5 Regional Competitive Analysis

### 6.5.1 Regional overview

To examine the unique positioning of Etheridge Shire, 11 local government areas (LGAs) surrounding Etheridge were analysed. These included Charters Towers Regional and Townsville City in the North Queensland region; Tablelands Regional, Mareeba Shire, Carpentaria Shire, Croydon Shire, and Burke Shire in Tropical North Queensland; and Flinders Shire, Richmond Shire, McKinlay Shire, Cloncurry Shire, and Mount Isa City in Outback Queensland. All these LGAs are located on two main parallel, self-drive tourism routes – The Savannah Way and The Overlander's Way.



**Figure 6.2: Competing shires and local government areas adjacent to Etheridge (Source: Queensland Government. Local Government Areas Boundaries).**

The Savannah Way is a 3925-kilometre self-drive tourist route between Cairns and Broome. The Tropical North Queensland section ends at Boodjamulla (Lawn Hill) National Park near the Northern Territory border, 1700 kilometres west of Cairns. The Savannah Way is branded as 'an outback adventure through Gulf country'. The competing route is Overlander's Way, about 300 kilometres south of the Savannah Way. The Overlander's Way connects Townsville and Camooweal in Queensland, continuing west to Tennant Creek in Northern Territory (1081 kilometres). Both self-drive tourism routes go through many outback destinations across the 11 LGAs, although a considerably large section of The Savannah Way in Queensland goes through Etheridge Shire, making the Shire a highly competitive self-drive tourism destination.



**Figure 6.3: The Savannah Way and The Overlander's Way (Source: Great Queensland Drive Map, accessed from <https://www.outbackqueensland.com.au/maps/>).**

Sections 6.5.2 and 6.5.3 analyse competitor destinations, including those located on The Savannah Way and The Overlander's Way as well as other destinations within the 11 adjacent LGAs. The purpose of this analysis is to identify the unique selling points and distinctive competitive advantage of Etheridge Shire. Appendix B summarises and compares the core endowed and created tourism resources offered at competing destinations.

## 6.5.2 Neighbouring LGAs

***Etheridge Shire's close competitors are the Tablelands Regional and Mareeba LGAs, bundled and marketed under the brand of 'Atherton Tablelands: Discover Perfect' by the Atherton Tablelands LTO.***

Tablelands and Mareeba offer rainforest, wildlife, and food tourism experiences. Both offer a wide range of accommodation options and are highly accessible from nearby coastal tourism towns such as Cairns and Port Douglas. Tablelands is known for waterfalls, volcanic crater lakes, and high altitude and picturesque towns/villages. Innot Hot Springs is also located in Tablelands, offering naturally heated geothermic pools to the public. Mareeba is known for rainforest village (Kuranda), coffee plantation, limestone caves, bird watching (recognised as the richest region for bird life), and hot air ballooning. Like Etheridge, Mareeba also features gold mining heritage and houses the award-winning Mareeba Heritage Museum.

Croydon, immediately west of Etheridge Shire offers similar savannah landscapes, gold mining heritage and scenic train. Although Croydon is known as one of the most beautiful towns in Gulf Savannah with historic buildings, tourism products and supporting hospitality services in Croydon are rather limited. This LGA also lacks coordinated destination marketing and clear branding, with potential to co-operate to achieve mutually beneficial outcomes with scarce resources.

To the east of Etheridge, Charters Towers Regional is the gateway to the outback via the Overlander's Way from Townsville. ***Charters Towers Regional's tourism tagline is 'Unearth Our Secrets', which directly competes with the 'Unearth Etheridge' brand.*** While Charters Towers and Etheridge promote gold mining history and heritage as their main tourism attraction, Charters Towers has carved out a space in art tourism (e.g., art trail, city murals, sculpture, country music festival etc.). The Texas longhorn cattle wagon tours and safaris are another distinctive tourism experience offered in Charters Towers.

On the southern and south-western borders of Etheridge Shire, Flinders and Richmond are known for paleo-tourism experience (e.g., dinosaur and fossils), but Flinders also houses the Porcupine Gorge, which is dubbed the little Grand Canyon and therefore, poses as a direct competitor to the Cobbold Gorge in Etheridge Shire. However, unlike Cobbold Gorge, Porcupine Gorge is a national park, which limits packaged tourism experiences that could be offered onsite.

### 6.5.3 Related outback LGAs

Northwest of Etheridge are Carpentaria and Burke, which offer gulf experience with fishing and Morning Glory Clouds (a spectacular cloud formation from September to November) being the two signature experiences. The products are significantly different from the outback Etheridge and hence, these shires are potential collaborators rather than competitors. Burke distinguishes itself from Carpentaria by featuring the Yagurli Indigenous tour, which offers holistic Indigenous experience from fishing charter, sunset cruise to stargazing experiences. Burke has established a strong brand for barramundi fishing by hosting the 'World Barramundi Fishing Championships'. As for Carpentaria, wetlands and inland river ports are two core resources that could be developed further into unique tourism experiences.

Cloncurry's tourism offerings overlap with Etheridge around mining heritage and equestrian sport. An abandoned open cut mine offers a unique landscape while the Cloncurry Unearthed Museum presents a direct threat to Etheridge Shire's brand, especially with its claim to house Australia's most comprehensive gem and mineral collection, which the Ted Elliot Mineral collection rivals. Aside from mining-themed tourism experiences and aviation history (the birthplace of Royal Flying Doctor Service), Cloncurry is lacking in distinctive natural assets.

McKinlay, albeit lacking distinctive natural assets, stands out from competing outback LGAs by leveraging created resources, such a farm stay, artesian bathhouses using therapeutic underground water, and the renowned Dirt n Dust Festival that offers a wide range of experiences including mud snorkelling, best-butt competition, rodeo, triathlon/run, and live music as a drawcard to bring visitors to the region.

As an important industrial, commercial, and administrative centre in the Outback, Mount Isa offers a different scale of tourism experiences and services. It is accessible by air and roads and offers a wide range of accommodation options. The signature experiences in Mount Isa include a replica mine and underground mining tour, oasis and the associated water activities, nature (e.g., Camooweal Caves National Park), and events. There is a good practice of destination management evidenced by an up-to-date destination marketing campaign and clear tourism development strategy plan.

#### **Summary: Regional Competitors**

All competing shires offer a wide range of adventure and outdoor tourism activities, from bird watching, wildlife watching, water activities (canoeing, kayaking, water-skiing, paddle boarding, swimming etc.), hiking, bushwalking, to cycling. As such, there is little point of differentiation in adventure tourism products in this region, except Mareeba which stands out with its hot air balloon experience and Burke with gliding and hang-gliding experiences. With all of these northern Queensland regions vying for market share within what is arguably a highly-homogenous demand-side, a collaborative approach to attracting and distributing visitors across neighbouring LGAs may be more prudent than direct competition.

### 6.6 Destination Competitiveness Summary

Section Six has presented a comprehensive analysis of Etheridge Shire's competitiveness as a tourism destination. Table 6.1 summarises the key tourism-related competitive advantages and disadvantages for Etheridge Shire as at the time of writing this directions paper.

**Table 6.1 Summary of tourism competitive analysis for Etheridge Shire.**

Competitive Advantages	Competitive Disadvantages
<ul style="list-style-type: none"> <li>• A wide range of natural tourism assets within the shire</li> <li>• Success in capitalising and packaging endowed resources with created resources and supporting services through private businesses</li> <li>• <i>Savannahlander</i> train is an iconic experience unique for Etheridge Shire</li> <li>• Dominate points of interest along the Savannah Way</li> <li>• Potential to promote Talaroo hot springs as a unique tourism experience</li> <li>• Potential to further develop Indigenous tourism based on existing product</li> <li>• Strong council commitment and community support for tourism development</li> </ul>	<ul style="list-style-type: none"> <li>• Natural attractions are similar to nearby destinations</li> <li>• Shared gold mining heritage in the region is difficult to differentiate</li> <li>• Competition from other museums and interpretive centres in neighbouring LGAs</li> <li>• Lack distinctiveness in adventure activities</li> <li>• Lack of a signature event</li> <li>• Limited hospitality options and quality</li> <li>• Gaps in essential services such as medical services, telecommunications</li> <li>• Problems with road accessibility</li> <li>• Diluted brand identity</li> <li>• Inconsistent level of information on destination marketing website</li> <li>• Current lack of data regarding tourism demand-side</li> </ul>

Whilst Etheridge Shire has wide-ranging factors in its favour to grow visitation into the future, the region faces some significant challenges which must be overcome if Etheridge Shire is to realise its tourism potential. ***Etheridge Shire's destination competitiveness can be improved through implementing a range of low-cost strategies*** such as minor enhancements to existing attractions through refurbishment, installation of interpretive materials, enhanced marketing and promotion, and realignment of its regional tourism coordination networks. However, ***to achieve a true economic transition in which tourism is repositioned as a key pillar of Etheridge Shire's economy, significant investment in essential services and infrastructure, alongside tourism-specific services will be required.*** As such, Section Eight goes on to outline a range of directions designed to underpin Etheridge Shire's economic transformation aspirations. However, prior to outlining future strategic directions, Section Seven highlights the tourism policy and planning landscape across various levels of government.

# 7. The Tourism Policy and Planning Landscape

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Today, tourism is an important economic development vehicle, particularly for regional areas. The three spheres of government in Australia therefore have a vested interest in tourism, and periodically devise strategic plans intended to guide investment and effort in developing tourism within their respective jurisdictions. Etheridge Shire's aspirations for economic diversification through tourism development should be considered in light of broader prevailing policy and planning environments. Doing so will enable Etheridge Shire to adopt strategies aligning with broader imperatives, thereby creating possibilities to tap funding and other enabling initiatives, a competitive advantage that many other regional councils do not possess. Section Seven reviews a range of strategies at the national, state, regional and local levels that are relevant to future tourism development in Etheridge Shire. Table 7.1 provides an overview of the relevant strategies.

## 7.1 National-Level Strategies

At the time of finalising this Directions Paper, the Australian Labor Party had recently defeated the Liberal/National Coalition at the May 2022 election. However, in early 2022 the Morrison government published 'Thrive2030,' the latest national-level tourism strategy. In the lead-up to the 2022 federal election, the Labor Party had pledged [support for the tourism sector's pandemic recovery](#) through investment in upskilling, addressing labour shortages and infrastructure. It is unclear how the change of federal government will impact upon the initiatives laid out in Thrive2030.

Nevertheless, Thrive2030 does identify a number of priority areas in which Etheridge Shire may stand to benefit. These include:

- Addressing labour shortages in the tourism and hospitality sectors by enhancing the domestic and international workforce and promoting career path development by improving workplace conditions
- Investments in tourism infrastructure for regional areas, such as aviation, port, and hotel facilities, and also smaller scale developments including new competitive visitor experiences
- Through the federal government's *Local Roads and Community Infrastructure Program*, working with local councils to identify infrastructure shared by residents and visitors that is in need of upgrading, particularly roads and parks
- Upgrading telecommunications services, particularly NBN access, in regional areas
- Assisting businesses to upskill in quality service delivery

Another relevant national-level strategy is an economic development plan for North Australia (defined as areas above the Tropic of Capricorn), which identifies tourism as a sector which should be supported for further growth. Further, Tourism Research Australia had recently released a scenario-based forecast on the sector's pandemic recovery. According to TRA, domestic and international tourism is expected to have mostly recovered by mid-2022 and late 2023, respectively. These forecasts bode well for Etheridge Shire, with the opportunity to focus on growing interstate visitation in the short term, whilst simultaneously expanding offerings in anticipation of growing international demand in the medium term.

## 7.2 State-Level Strategies

State-level tourism strategies are primarily the responsibility of the State Tourism Organisation (STO), Tourism and Events Queensland (TEQ). However, other government agencies that oversee infrastructure or services with linkages to tourism (e.g., roads, aviation) also periodically produce strategic plans that have an impact on the



tourism sector. At the time of writing, the Palaszczuk Labor government was in its third term having been returned in the October 2020 state election. As such, the state-level tourism policy environment is stable, with a focus on recovery from the Covid-19 pandemic during which the Queensland tourism sector was heavily impacted by lengthy state and international border closures.

However, the Covid-19 pandemic appears to have undermined a suite of Queensland state-level tourism strategic plans. Whilst the most recent strategic plan published was the *Tourism and Events Queensland Strategic Plan 2021-2025*, all other state-level plans were published prior to the pandemic and therefore do not take into account Covid-19-induced impacts on global tourism. The current TEQ strategic plan sets out a range of objectives centred around a theme of 'unit and recover,' the plan does not detail enabling initiatives aimed at supporting the tourism sector's pandemic recovery. As such, Etheridge Shire will need to closely monitor state-level policy and strategy developments in order to access any future funding or resource support opportunities.

## 7.3 Regional-Level Strategies

At the regional level, Etheridge Shire has affinities with two RTOs: the Outback Queensland Tourism Association (OQTA) and Tourism Tropical North Queensland (TTNQ), of which Etheridge Shire is currently a member. There appears to be strong collaboration between the Queensland STO and both RTOs, OQTA and TTNQ. However, the regional policy landscape is similar to the abovementioned state situation in that the Covid-19 pandemic has triggered the need for significant strategic recalibration.

Existing, published TTNQ strategy documents do not specifically address the Covid-19 pandemic, thus it is reasonable to assume that a recovery-themed strategic plan for the region is forthcoming. The most recent OQTA strategic plan was published during the height of 2021 state border closures and the national vaccine rollout, and therefore places an emphasis on developing self-drive tourism in outback Queensland.

As the 'new normal' of tourism beds in, it is expected that new strategic plans will emerge that are informed by greater clarity around issues such as state and territory government policies, traveller confidence, international travel demand, and broader macro-economic factors. Etheridge Shire will not only need to closely monitor developments in regional tourism policy and strategy, it should also be proactive in shaping policy and strategy through assertive representation at RTO forums.

## 7.4 Local-Level Strategies

The most relevant local-level strategic plan is the Etheridge Shire Planning Scheme (2020). This document sets out a favourable disposition by Etheridge Shire Council towards future economic diversification for the Shire through tourism development and investment in renewable energy sources. Importantly, the document specifically identifies a need for road upgrades and a regular, ongoing maintenance schedule to support tourism within Etheridge Shire, particularly given the importance of the self-drive visitor segment. This identified need aligns with strategic investment priorities outlined in numerous state and federal strategies intended to support regional tourism. As such, Etheridge Shire should prioritise opportunities to apply for roads infrastructure funding as a pillar of its tourism development agenda.

**Table 7.1 Federal, state, regional, and local-level strategic plans relevant to tourism development in Etheridge Shire.**

Document	Year	Author	Relevance
<b>National-Level Strategies</b>			
<a href="#"><u>Thrive 2030: The Re-Imagined Visitor Economy</u></a>	2022	Australian Government: Australian Trade and Investment Commission	Refreshed national-level strategy for tourism in Australia Focuses on establishing a path to recovery and future growth post-Covid-19 Emphasises respectfully embedding ATSI cultures into tourism products
<a href="#"><u>Our North, Our Future: 2021-2026 Targeted Growth</u></a>	2021-2026	Australian Government: Office of Northern Australia	Strategic plan for economic development in areas of Australia north of the Tropic of Capricorn Identifies road investments as 'vital' to grow the tourism industry and foster growth in other industries Supports development of Indigenous tourism in northern Australia through the Australian Government's <a href="#"><u>Indigenous Tourism Fund</u></a>
<a href="#"><u>Tourism Recovery Scenarios</u></a>	2020	Tourism Research Australia	Offers a variety of forecasted scenarios for the recovery of Australian tourism post Covid-19 Forecasts a 'most likely' scenario of domestic tourism recovery by July 2022; international travel by October 2023
<b>State-Level Strategies</b>			
<a href="#"><u>TEQ Strategic Plan</u></a>	2021-2025	Tourism and Events Queensland	Sets out the strategic vision for Queensland's STO for the period 2021-2025 Strong emphasis on recovery from Covid-19-induced impacts on Queensland tourism Notes inherent uncertainty will impact the tourism sector's ability to bounce back from Covid-19 disruptions Facilitating the design of new and innovative tourism experiences is one of six strategic pillars for TEQ between 2020 and 2024
<a href="#"><u>TEQ Marketing Strategy</u></a>	2018-2025	Tourism and Events Queensland	Strategic plan designed to address three objectives: <ol style="list-style-type: none"> <li>1. Increase overnight visitor expenditure (OVE) from priority domestic and international source markets, supporting Queensland jobs</li> <li>2. Maintain and grow Queensland's share of Australian OVE</li> </ol>

			<p>3. Grow equity in the Queensland brand</p> <p>Seeks to support tourism operators in continuously innovating and improving experience offerings</p>
<a href="#"><u>Queensland Asia Tourism Strategy</u></a>	2016-2025	Tourism and Events Queensland	<p>State-level strategic plan to increase Queensland's market share of Asian outbound tourism</p> <p>'Adventure and discovery' experiences are one of five pillars alongside natural encounters and the Queensland lifestyle. Etheridge Shire has the potential to align with all three of these pillars</p>
<a href="#"><u>Queensland Tourism and Transport Strategy</u></a>	2016-2020	Queensland Government: Department of Transport and Main Roads	<p>State-level strategic plan to 'improve access across Queensland and enhance the visitor experience to help grow the tourism industry'</p> <p>Centered around four themes: visitor information, transport services, transport ticketing and products, and planning and investment</p>
<b>Regional-Level Strategies</b>			
<a href="#"><u>Tourism Tropical North Queensland Strategic Direction</u></a>	2021-2022	Tourism Tropical North Queensland	<p>Sets out a vision for Tropical North Queensland to 'be Australia's most visited nature-based and ecotourism destination'</p>
<a href="#"><u>Tropical North Queensland Destination Tourism Plan</u></a>	2021	Tourism Tropical North Queensland	<p>Regional-level strategic plan for tourism development within the scope of the Tourism Tropical North Queensland RTO boundaries</p> <p>Identifies development of Indigenous tourism products as a strategic priority</p> <p>Identifies poor telecommunications infrastructure as an impediment to tourism development in Tropic North Queensland</p> <p>Self-drive experiences into outback/peripheral areas of Tropical North Queensland are identified as a strategic priority</p>
<a href="#"><u>Outback Queensland Destination Management Plan</u></a>	2021-2024	Outback Queensland Tourism Association	<p>Regional Destination Management Plan designed to guide responses to challenges and opportunities stemming from the Covid-19 pandemic</p> <p>Anticipates a potential shift in core traveller needs away from self-actualisation to prioritising safety and security</p> <p>Positions strong web presence and digital literacy as crucial capabilities for tourism businesses in a post-pandemic world</p> <p>Recognises that quality road infrastructure is key to enabling a strong self-drive tourism market into outback Queensland</p>

<a href="#"><u>Advancing Tourism in North Queensland</u></a>	2016-2020	Queensland Government	Queensland Government strategic plan for growing the tourism sector in North Queensland Focuses on four priority areas: grow quality products, events and experiences; invest in infrastructure and access; build a skilled workforce and business capabilities; and seize the opportunity in Asia.
<b>Local-Level Strategies</b>			
<a href="#"><u>Etheridge Shire Planning Scheme</u></a>	2020	Etheridge Shire Council	Most recent planning scheme devised by Etheridge Shire Council in accordance with the Queensland Planning Act 2016, intended to govern future development in the Shire over the next 20 years Seeks to support transitioning the Etheridge Shire economy by a diversification strategy in which tourism and renewable energy become key economic pillars alongside mining and agriculture Emphasises an objective of smoothing tourism seasonality in order to realise year-round benefits Recognises a need for road upgrades and ongoing maintenance to support tourism in the Shire
<a href="#"><u>Unearth the Etheridge Scenic Region through Geotourism</u></a>	2017	Angus M Robinson, for Etheridge Shire Council	Proposal to further leverage the Unearth Etheridge brand by positioning the Shire (in collaboration with neighbouring LGAs) as a 'geotourism' destination Predicated on the establishment of geotrail linkages featuring key natural, cultural and geological attractions
<a href="#"><u>Tourism Survey Report</u></a>	2018	Gulf Savannah Development	Findings from collection of primary from visitors to the Gulf Savannah region Identified mobile phone connectivity as a significant area of visitor dissatisfaction Queensland residents were the dominant visitor group, thus significant scope to tap interstate domestic markets with enhanced marketing Lack of tourism demand-side data hampers effective product development and marketing strategies

## 7.5 Summary

At the time of writing this Directions Paper, the Australian tourism sector is in a phase of initial recovery from the Covid-19 pandemic. The tourism policy and strategy landscape is in flux due to a change in federal government, and lag times associated with STOs, RTOs and LTOs recalibrating their strategies to accommodate the pandemic recovery phase.

It is reasonable to assume that the federal and Queensland state governments will be supportive of the tourism sector's recovery, and there is an opportunity for Etheridge to capitalise on this. Despite the current state of flux, opportunities do exist for Etheridge Shire to tap into funding and other support through government recovery initiatives. Etheridge Shire's remote location, existing tourism resources and experiences, and its future tourism development aspirations align well with regional, state, and federal and regional objectives to stimulate domestic tourism, attract greater numbers of inbound tourists, and to disperse those visitors away from international gateways such as Brisbane and Cairns into regional areas. Etheridge Shire must remain vigilant and proactive in monitoring for emerging funding and support opportunities.

# 8. PROPOSED FUTURE DIRECTIONS

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Attention is now turned to a range of proposed strategic directions intended to enhance the competitiveness of Etheridge Shire as a tourism destination into the future, which require strategic discussion and decision making by council. These recommendations are structured through the application of the destination competitiveness framework reviewed in Section Six.

## 8.1. Capitalise on Endowed Resources

Etheridge Shire's focus on natural elements appears effective as compared to nearby shires offering similar natural attractions. ***Etheridge Shire has a competitive advantage in capitalising and packaging its endowed resources with created resources and supporting services into more complete tourism experiences*** offered by private businesses. For example, the installation of well-researched and well-presented interpretive signage, connected by thematic trails, telling stories of history and culture, could add significant value to many existing tourism sites across the region for relatively low cost.

While this is the case for some natural resources (e.g., Cobbold Gorge), others could benefit from more information and promotion via the Uneath Etheridge website (e.g., Copperfield Gorge which has little information available and Talaroo Hot Springs which does not feature on the page). In addition, some of Etheridge Shire's natural and cultural resources could be enhanced to strengthen the quality and the range of experiences offered to visitors. To maximise the attractiveness of Etheridge Shire's endowed resources, the following actions are proposed:

### 8.1.1. Promote Talaroo Hot Springs as a unique tourism experience

***Talaroo Hot Springs can be a strong drawcard for visitors with the potential to be featured as a unique, exclusive experience offered only in Etheridge Shire.*** The only competing product is Innot Hot Spring in Tablelands Regional, but it is a public hot spring and does not offer the same calibre of experience as Talaroo. Talaroo offers a more comprehensive experience, including an Indigenous tour and hot spring experience, complemented by accommodation and a restaurant. At present, Talaroo is not featured as one of the main experiences on Uneath Etheridge's main page.

**1. Talaroo Hot Springs should be featured prominently as a key tourism attraction on the Uneath Etheridge website.**

### 8.1.2. Package and promote other natural resources

Whilst some natural resources in Etheridge Shire are effectively packaged with created resources and supporting services into more complete tourism experiences offered by private businesses, others do not receive the same level of attention. For example, Copperfield Gorge is an attractive locale, though little information is available. The description provided on the Uneath Etheridge website could be enhanced by highlighting Copperfield Gorge's key features and adding other images. Various reviews of Copperfield Gorge on TripAdvisor emphasise the easy access of the location and its proximity to the Einasleigh Pub for refreshments, information that could be added on the description of the place. Kidston Dam, built to service the historic Kidston Gold Mine, is another area which the development of potential future tourism experiences.

**2. Provide more comprehensive information about features, location and accessibility of key natural tourism attractions on the Uneath Etheridge website.**



### 8.1.3. Develop Indigenous tourism

*The rich Indigenous heritage of Etheridge Shire could be capitalised to offer meaningful and unique experiences to visitors*, which can be promoted as key experiences in the Shire. The Unearth Etheridge website acknowledges Ewamian Peoples Country, which lies within Etheridge Shire and has a wide range of cultural and significant sites but does not expand this information. Additionally, the competitor analysis (Section 6.5) revealed Indigenous tourism as an uncontested market, with only Burke Shire featuring an Indigenous tour as their signature experience. This is a clear space that Etheridge Shire could tap into. Etheridge Shire could work with local stakeholders to create these experiences and to promote them on the Unearth Etheridge website, such as the Laura Quinkan Indigenous Dance Festival.

**3. Consult with local Indigenous groups regarding opportunities for enhancement or development of Indigenous tourism experiences within Etheridge Shire.**

## 8.2 Diversify and Enhance Created Resources

Mining heritage is a shared tourism experience offered in the region. Common tourism experiences include heritage buildings, heritage walk and tour, museum with mineral collection, and fossicking. To complement the endowed heritage resources, Etheridge Shire can invest further in created resources. Large-scale infrastructure projects can assist the shire in gaining a competitive advantage. Accordingly, the following recommendations are put forward:

### 8.2.1. Develop a unique tourist mine

A tourist mine represents a potentially untapped opportunity for Etheridge Shire. While independent fossicking is a common experience offered in the region, it requires license and know-how, which may hinder the uptake of this unique experience by visitors with little to no experience with fossicking. *A tourist mine could provide a staged authentic, relaxing and educational experience*, which is likely to capture the interest of family and international markets alike. Similar attractions have been successfully developed in other states, such as [Sovereign Hill](#) in Ballarat, Victoria, which is successfully marketed as a 'living museum'. The proposed mine could capture the unique and charismatic gold mining and gem fossicking heritage in the Etheridge Shire, with visitors learning to fossick in a controlled environment without requiring a license. Feasibility of other types of tourist mines could also be explored.

Development of a tourism-oriented mine experience similar, but positioned differently to [Mount Isa's Hard Times Mine Underground Tour](#) in which visitors tour underground shafts and are able to operate machinery, is *an opportunity for Etheridge Shire tourism and resources stakeholders to collaborate together*. As discussed in Section Three, greater benefits may be realised for rural communities when the tourism and resources sectors collaborate for the greater good of the community rather than co-existing independent of one-another.

**4. Engage a specialist agency to conduct a feasibility study for converting a suitable site into a tourism-oriented, educational mining heritage experience.**

### 8.2.2. Create a world class museum on the Ted Elliot mineral collection

Construction of a world class museum in Georgetown, a central focus point in the Savannah Way, which offers contemporary interpretive visitor experiences showcasing Etheridge Shire's mining and agriculture history using state-of-the-art technology is another possibility to enhance destination competitiveness. Local resources firms could be approached to assist in the design of, and contribute funding for a museum facility. Making such contributions would be a positive step for resources firms to affirm commitment to corporate social responsibility and to creating a lasting legacy for the sector in Etheridge Shire. An obvious initial target is an extension to the Terrestrial Centre to showcase the Ted Elliot Mineral Collection. The 8,000 strong mineral specimens contained in the collection could form the basis for a world class visitor facility, and complement the existing work designed

to showcase the agricultural heritage of Etheridge in the Terrestrial Centre. Concept designs for the Ted Elliot mineral collection should be completed immediately.

**5. Engage a specialist agency to conduct a feasibility study for construction of museum facility showcasing Etheridge Shire's agricultural and mining history.**

### 8.2.3. Create and package innovative tourism experiences

By *linking natural resources and cultural heritage with innovation, Etheridge Shire can develop products and experiences to further increase the attractiveness of the region.* In particular, virtual and augmented reality can play a key role in this innovative experience. Augmented reality can be explored to create a distinctive experience around fossicking and heritage. At the same time, virtual reality could be an avenue to digitally simulate a mining town that no longer exists. Such experiences have been successfully implemented at other locations; for example, McKinlay offers a virtual reality cattle muster experience at the Julia Creek Visitor Information Centre.

**6. Explore the possibility of integrating a mining/fossicking-themed virtual reality experience into the Terrestrial Information Centre.**

### 8.2.4. Expand the range of accommodation options

Assuming sufficient future visitation growth, *Etheridge Shire could pursue private sector investment to expand accommodation options.* Development of a second high-end accommodation option to complement the existing offering may enhance the appeal of Etheridge Shire to higher-yield visitor segments. Relatedly, the development of hostels and other mid-range accommodation options such as farm stays could open up Etheridge Shire to a broader range of price-sensitive visitor segments. Importantly, and as is currently not the case, *all accommodation properties should all be featured on the Uneath Etheridge website* to ensure maximum visibility. Additionally, the unique aspects of each accommodation property should also be highlighted on the page.

**7. Issue an invitation to the private sector to develop a second high-quality accommodation property within Etheridge Shire. Consider subsidies such as discounted development application fees or rate relief as incentives.**

### 8.2.5. Develop and package food experiences

Food experiences are well sought by visitors in regional areas. Currently, the Uneath Etheridge page lists the local businesses where food and drinks are served under the Info and Services section, with only location and contact details provided. This information can be presented in a more appealing way by also promoting the unique products each business serves. Food experiences can be created in collaboration with the local businesses to create routes for certain products in a similar way to what is done in the competing shires (e.g., Tablelands Regional and Mareeba) and serves as a strong way to bolster support for tourism from the agricultural sector.

**8. Encourage local businesses to develop and promote food-oriented tourism product packages. Promote food experiences prominently on the Uneath Etheridge website.**

### 8.2.6 Strengthen Etheridge Shire's event portfolio

*Etheridge Shire already hosts a limited range of local and community events. However, there is scope to develop a more robust, strategic calendar and to fully explore promotional opportunities.* The events section of the Uneath Etheridge website can be further expanded by providing more comprehensive information on existing events such as experiences on offer, event schedules, and integrating a wider variety of images.

Whilst Etheridge Shire could benefit from a more strategic portfolio approach to events, existing constraints regarding limited visitor accommodation raise questions around the region's ability to cope with influxes of event

patrons. Although it is hoped that future tourism growth will be the catalyst for growing the region's accommodation stock, in the meantime Etheridge Shire may need to consider temporary accommodation options to support major events. Large-scale camping sites are a common feature of large-scale festivals such as the East Coast Blues and Roots Festival in Byron Bay, and could be a viable option for Etheridge Shire. Alternatively, establishing temporary accommodation hubs during events and making use of relocatable accommodation 'pods' may be another solution. Such approaches have been adopted by councils in northern New South Wales in responding to the housing crisis brought about by the March 2022 floods.

It is also recommended that ***Etheridge Shire considers the possibility of creating a signature event.*** This event would offer a fun and unique experience to visitors as well as the community. This event could be created together in consultation with the local community to rally their support and involvement. Distinctive events have created success stories in various parts of regional Australia (e.g., Chinchilla Watermelon Festival, Parkes Elvis Festival). Another strategy is to attract external event organisers to bring events and festivals to the region, such as the Women of the World Festival in Longreach, Outback Queensland. A well planned and managed unique event can be a catalyst for increased visitation to a destination as well as to magnify the awareness of the region.

**9. Engage an external consultant to assess Etheridge Shire's existing event portfolio and explore opportunities for a signature event for the region.**

### 8.2.7 Develop opportunities for diverse, inclusive and active mobility

Within Australia, there is a growing interest in active modes of mobility, particularly cycling and walking. At the same time, tourism destinations around the world have turned their attention to developing infrastructure catering for diverse, inclusive and active mobility. Some destinations have benefited substantially by investing in the development of sophisticated trail networks and parks (e.g., [Derby in Tasmania](#)), whilst others have converted disused railway corridors into multi-purpose recreational trails (e.g., the [Brisbane Valley Rail Trail](#)). Meanwhile, technological advancements have led to the development of electrically-assisted 'e-bikes', which have helped make cycling more accessible to a broader range of people with differing fitness and ability levels. However, the uptake of e-bikes and e-scooters is predominantly in urban centres, which is restrictive for certain segments who want to trail different mobility types.

***Etheridge Shire is well-placed to enhance its destination competitiveness through investment in diverse, inclusive and active mobility. Opportunities exist to develop themed trails connecting various locations across the Shire that have tourism value.*** Similarly, opportunities exist to develop specific trail infrastructure catering for mountain bike tourists. A location which would be suited to this is the Charleston Dam, through the construction of a trail from Forsayth to Charleston Dam, which could provide visitors with the opportunity to trial diverse mobility types, such as ebikes and scooters to explore the Charleston Dam recreation area from Forsayth. The neighbouring Tablelands Regional LGA has developed an enviable reputation as a mountain bike tourism destination, having invested in a comprehensive mountain bike trail network and associated promotional activities. Etheridge Shire could look to leveraging the substantial work already undertaken in developing the [Tropical North Queensland Regional Mountain Bike Strategy](#).

**10. Engage an external consultant to examine demand for active mobility experiences within Etheridge Shire and to scope viable opportunities for trail creation within the region.**

## 8.3 Improve and Leverage Supporting Resources

Community consultation identified wide-ranging gaps with regard to Etheridge Shire's supporting resources. In order to support future tourism development in the region, it is critical that gaps pertaining to essential services be addressed.

### 8.3.1 Improve road access

**Road access across Etheridge Shire was widely identified as problematic. Not only does this factor adversely impact upon the ability of local residents to go about their daily lives, road access issues detract from the attractiveness of Etheridge Shire as a tourism destination.** Further, given Etheridge Shire's remote location and its reliance upon the self-drive visitor market, improving the quality of key roads across Etheridge Shire, particularly those servicing key tourism sites will be critical if future tourism growth is to be realised.

Given Etheridge Shire's vast geographical area, Council naturally faces challenges in identifying and responding to locations in need of road maintenance. This is not a unique challenge, however. Other LGAs have elected to engage their citizens in reporting issues through mobile apps. For example, Bundaberg Regional Council has adopted a [GPS-enabled mobile app called 'Snap Send Solve'](#) which enables residents to photograph and report issues such as potholes directly to Council. Assuming that mobile phone reception coverage is improved across the region in future, it is recommended that Etheridge Shire Council also adopt a similar reporting system and encourage residents and visitors to proactively report road maintenance issues. Doing so may have the added advantage of producing data which may be used for state or federal funding applications

**11. Invest in upgrading key local roads under the responsibility of Etheridge Shire Council; explore state and federal grant funding opportunities for upgrading roads of regional significance; implement a mobile app road maintenance reporting system.**

### 8.3.2 Prioritise availability of essential services required by local residents and visitors

As identified in Section 4.2, there are gaps in essential services within Etheridge Shire required by local residents and visitors alike. For example, **there are gaps with regards to health care and medical services. Service stations, food outlets, and grocery stores are also very limited throughout the region.** Issues with mobile phone reception and Internet access across Etheridge Shire were widely identified as problematic within the community survey and stakeholder interviews. The community survey identified that future tourism development should be undertaken in alignment with a key strategic goal of improving quality of life for local residents.

Future tourism growth will likely induce the natural spin-off benefit of expanding the local economy and therefore providing greater incentive for private sector investment in services such as food, fuel and grocery outlets. However, gaps in health care, medical services and telecommunications likely detract from the attractiveness of Etheridge Shire as a place to live and as a place to visit. It will be crucial for Etheridge Shire Council to lobby the state government and relevant private sector providers for enhanced health, medical and telecommunications services in order to drive the dual-sided strategic goals of improving local residents' quality of life and growing visitation to the region.

**12. Lobby relevant private providers and state/federal agencies for upgrades to health care, medical and telecommunications services within Etheridge Shire.**

### 8.3.3 Leverage local air access

At present, Etheridge Shire is largely reliant upon self-drive tourists and visitors arriving on the *Savannahlander* railway service. At the same time, Etheridge Shire hosts four small airports/airstrips. Two of these (Georgetown and Mount Surprise) feature sealed runways capable of handling larger turboprop aircraft similar to those used by commercial airlines to service regional communities across Australia. Whilst there may not be a business case at present to lure regular commercial air passenger services into Etheridge Shire, this possibility remains open should future visitation growth warrant such. In the meantime, **Etheridge Shire could explore collaborations**

*with smaller air operators based in locations such as Cairns or Townsville to operate ad hoc, bespoke charter operations* in order to tap short-stay, high yield visitor segments.

**13. Examine latent demand for ad-hoc, bespoke air charters from nearby major centres; initiate discussions with air charter operators in Cairns and/or Townsville.**

## 8.4 Enhance Destination Governance and Marketing

Enhancing packaging and promotion of unique experiences is essential for the success of Etheridge as a destination. Below is a selection of key recommendations regarding destination marketing.

### 8.4.1. Establish an independent regional development forum

A commonly recurring issue during community consultation was a need for a forum in which key stakeholders within Etheridge Shire may come together to discuss regional development issues within the Shire, particularly tourism development. At the same time, the proposal to diversify Etheridge Shire's economy by positioning tourism as a key pillar alongside the traditional economic activities of mining and agriculture risks dysfunction if not prudently managed.

The desktop review of rural economies in transition presented in Section Three shed light on a range of challenges faced by other regional locations when attempting to integrate tourism alongside the resources and agriculture sectors. Similarly, this review also revealed a suite of strategies that may assist in overcoming such challenges. One key message flowing from this review was the importance of fostering cross-sectoral dialogue between key stakeholders in order to develop trust, cooperation, and a shared vision for regional development in which key economic sectors make fair contributions.

Whilst Etheridge Shire appears to have had a tourism discussion forum in the past, in order to achieve the desired economic transition, it will be crucial to implement an independently-chaired forum which encourages broader cross-sectoral dialogue. Many of the recommendations made in this Directions Paper relating to product and infrastructure development are dependent upon effective collaboration between the tourism, resources and agriculture sectors. Establishment of an independently-chaired regional development forum for Etheridge Shire is a fundamental stepping stone towards realising the region's tourism development objectives.

**14. Establish an independently-chaired regional development forum. Encourage participation by the tourism, resources and agriculture sectors in developing a shared, long-term vision for regional development in which tourism is integrated as a central economic pillar.**

### 8.4.2 Explore opportunities to join OQTA

Given the characteristics of the region's tourism offerings in Etheridge, *Etheridge is more likely to benefit from either extracting itself from the Tourism Tropical North Queensland (TTNQ) Regional Tourism Organisation, or creating a 'dual mandate' between TTNQ and the Outback Queensland Tourism Association (OQTA) RTO.* There is a clear lack of synergy between the styles of tourism promoted by TTNQ and that on offer in Etheridge Shire. Remaining solely aligned with TTNQ is likely to perpetuate a diluted tourism brand and promotion for Etheridge Shire.

Adjacent shires south of Etheridge such as Flinders and Richmond are classified as Outback Queensland, and are supported in terms of tourism coordination and promotion by OQTA. Additionally, some towns within Etheridge Shire, such as Forsayth, promote the region as being part of Outback Queensland (<https://www.visitforsayth.com.au/about>). The key benefit to Etheridge Shire in joining OQTA lies in potential collaborative opportunities to develop broader regional tourism itineraries and packaged products with



complimentary shires. Any change in the categorisation of Etheridge requires an agreement to be reached between the two relevant RTOs, TTNQ and OQTA.

**15. Consider either withdrawing from Tourism Tropical North Queensland RTO in favour of Outback Queensland Tourism Association RTO. Prior to actioning this proposed Direction, opportunities for a 'dual mandate' or membership should be explored.**

### 8.4.3. Expand the Uneath Etheridge website

As mentioned in several previous recommendations above, the *Uneath Etheridge website may be strengthened by incorporating more detailed information about key attractions and activities* including:

- Promoting the region's event portfolio in a more appealing way;
- Highlighting the distinctive experiences which are not currently featured including *Savannahlander* and the Hot Springs;
- Promoting key services such as accommodation properties, and food and beverage services in a more engaging way to emphasise what Etheridge Shire has to offer;
- Adding information to the range of activities such as birdwatching (currently the website only mentions one birdwatching site in the shire) and cycling/walking trails available.

**16. Engage a digital marketing agency to identify and implement strategies aimed at maximising the Uneath Etheridge website's promotional capacity.**

### 8.4.4 Strategic social media use

Savvy and strategic use of social media can assist in strengthening awareness of a destination and in stimulating demand by generating a perpetual online narrative. *Whilst Etheridge Shire currently has a social media presence by way of the Uneath Etheridge Facebook and Instagram pages, there are opportunities to further leverage these platforms.* For example, the Uneath Etheridge Instagram features just 30 posts across a three-year period. These social media platforms should be used to provide a stream of fresh information and to create dialogue with prospective visitors.

Moreover, encouraging visitors to share their experiences through a centralised hashtag has the added benefit of generating an authentic, independent review system. At the time of writing, 437 Instagram posts were tagged #uneathetheridge, dating back to around late 2020. By encouraging visitors to share their own images and stories, these unchoreographed testimonials can help build a destination's brand and instil a desire in others to visit that region. Council could explore strategic use of celebrities or social media influencers in the off season to showcase the region to diverse potential target markets.

**17. Engage a digital marketing agency to develop a tailored social media strategy for generating awareness among specified target markets of Etheridge Shire as a tourism destination.**

### 8.4.5 Leverage the 'Uneath Etheridge' brand into a broader regional promotional strategy

The Uneath Etheridge tagline is an effective branding strategy which draws upon the region's attractive geological features and emphasises that Etheridge Shire's natural landscapes and mining heritage is there to be discovered by prospective visitors. There has also been significant investment in developing a comprehensive Uneath Etheridge website to serve as the key digital promotional tool for the Shire. As such, it is recommended that Etheridge Shire carries on building brand awareness through the Uneath Etheridge tagline.



However, it is potentially problematic that the nearby Charters Towers LGA utilises the tagline ‘Unearth our secrets.’ Rather than engage in outright competition with this closely-related tagline, Etheridge Shire and the broader outback Queensland region may benefit from a more collaborative approach to promoting the geological and other natural features of this part of Australia. Engaging in outright competition could lead to a doubling-down by Charters Towers and lead to brand dilution for both LGAs.

As an extension of an earlier recommendation that Etheridge Shire reconsiders its RTO alignment, it is recommended that as part of that process a regional discussion be held regarding a branding strategy that benefits all LGAs in this region, including the potential to broaden out the theme of ‘unearthing’ the broader region.

**18. Initiate broader regional-level discussions with nearby LGAs regarding the potential to leverage the ‘unearth’ theme into a regional branding strategy which benefits a range of outback Queensland LGAs, with Etheridge position as the ‘centre’.**

## 8.5 Enhance Understanding of Tourism Demand Conditions

A detailed understanding of visitors and potential visitors is fundamental for the success of the destination. The following recommendation is then proposed:

### 8.5.1 Develop and implement a Visitor Survey

A visitor survey has the potential to yield a deeper understanding of how familiar Etheridge is as a destination and the image associated with it. Similarly, the survey could assist the shire and its different stakeholders to gain a better understanding of the key aspects valued by visitors. This can in turn underpin further product development and more targeted marketing campaigns.

**19. Engage an external agency to design and implement an annual survey of visitors to Etheridge Shire.**

## 8.6 Respond to Key Situational Conditions

Community consultation, regional competitive analysis, and other desktop reviews revealed a number of prevailing conditions that currently constrain Etheridge Shire’s destination competitiveness and which could pose a threat to future tourism growth. Directions relating to these situational conditions are outlined below.

### 8.6.1 Enhance business and community readiness for tourism growth through education

Community consultation identified that ***small pockets of resistance exist across Etheridge Shire with regard to supporting future tourism growth in the region. Other data suggested that some businesses struggle with quality service delivery for tourism.*** These issues point to a need for education programs to be rolled out across Etheridge Shire in order to garner support for the region’s future tourism strategy and to support the community in this economic transition.

Based on the data collected, community-based educational programs should address four key issues: (i) developing an awareness of Etheridge Shire’s future strategic directions for tourism and why these directions have been chosen; (ii) growing awareness amongst the community as to the economic, social, and environmental benefits that prudently planned and managed tourism can generate for the region; (iii) service quality education catering for owners and workers of businesses servicing the needs of visitors; and (iv) digital literacy for tourism-oriented business owners and workers to enable businesses to provide visitors with key information in an efficient manner, and to optimise businesses for the digital economy (e.g., clear presence on the web, app development, harness digital payment technologies).

**20. Engage external providers to develop and deliver educational programs targeted at enhancing business and community readiness for future tourism development, with a particular focus on service delivery, digital literacy, and engagement with the digital economy.**

## 8.6.2 Address existing labour constraints

***Etheridge Shire faces clear labour constraints, particularly within tourism and service oriented-businesses.*** The region will continue to face growing challenges brought about through an increasingly ageing local population and migration of younger residents moving away from Etheridge Shire in search of more economically attractive employment and educational opportunities. If future tourism growth is to be realised, it is fundamental that tourism and related service businesses are able to source the labour needed to run those operations and underpin business continuity.

Addressing labour supply challenges overlaps with many earlier recommendations made within Section Seven. Nevertheless, possible strategies that may assist in alleviating labour constraints may include:

- Improving essential services to increase the attractiveness of Etheridge Shire as a place to live.
- Examining possibilities for increasing the availability of affordable residential accommodation across the region.
- Examining the potential for a youth hostel, designed to attract working holiday makers.
- Enhancing the value proposition for young local residents to remain in Etheridge Shire through initiatives such as training or apprenticeship schemes in the services sector, or financial living expense subsidies.
- Partnering with the Queensland state government to offer vocational training opportunities in collaboration with accommodation and food and beverage establishments.
- Improving mobility in and out of Etheridge Shire through enhanced road, rail or air transport such that local residents may access educational and/or employment opportunities in other major regional centres whilst still substantially residing in Etheridge Shire.

Whilst there are a range of options Etheridge Shire Council could consider to ameliorate labour constraints, strategic success hinges on robust evidence to ensure the true underlying causes of this condition are understood before taking action.

**21. Engage an external agency to examine causes of labour constraints and population migration from within Etheridge Shire, along with the viability of plausible remedial strategies.**

## 8.7 Summary of Recommendations

The recommendations presented in Section Eight are aimed at enhancing Etheridge Shire's destination competitiveness. These recommendations are based around issues identified in the destination competitiveness analysis presented in Section Six, combined with data collected through the community consultation processes presented in Section Five. External funding would need to be secured to secure resources to support many of the proposed Directions outlined.

Table 8.1 (overleaf) summarises the directions along with recommended strategies presented in Section Eight. These recommendations also form an important foundation for the Etheridge Shire Tourism Masterplan.

**Table 8.1 Summary of recommendations to enhance Etheridge Shire’s destination competitiveness.**

Core Recommendations	Recommended Strategies
<p><b>Capitalise on endowed resources</b></p>	<p>Talaroo Hot Springs should be featured prominently as a key tourism attraction on the Uneath Etheridge website.</p> <p>Provide more comprehensive information about features, location and accessibility of key natural tourism attractions on the Uneath Etheridge website.</p> <p>Consult with local Indigenous groups regarding opportunities for enhancement or development of Indigenous tourism experiences within Etheridge Shire.</p>
<p><b>Diversify and enhance created resources</b></p>	<p>Engage a specialist agency to conduct a feasibility study for converting a suitable site into a tourism-oriented, educational mining heritage experience.</p> <p>Engage a specialist agency to conduct a feasibility study for construction of museum facility showcasing Etheridge Shire’s agricultural and mining history.</p> <p>Explore the possibility of integrating a mining/fossicking-themed virtual reality experience into the TerrEstrial Information Centre.</p> <p>Issue an invitation to the private sector to develop a second high-quality accommodation property within Etheridge Shire. Consider subsidies such as discounted development application fees or rate relief as incentives.</p> <p>Encourage local businesses to develop and promote food-oriented tourism product packages. Promote food experiences prominently on the Uneath Etheridge website.</p> <p>Engage an external consultant to assess Etheridge Shire’s existing event portfolio and explore opportunities for a signature event for the region.</p> <p>Engage an external consultant to examine demand for active mobility experiences within Etheridge Shire and to scope viable opportunities for trail creation within the region.</p>
<p><b>Improve and leverage supporting resources</b></p>	<p>Invest in upgrading key local roads under the responsibility of Etheridge Shire Council; explore state and federal grant funding opportunities for upgrading roads of regional significance; implement a mobile app road maintenance reporting system.</p> <p>Lobby relevant private providers and state/federal agencies for upgrades to health care, medical and telecommunications services within Etheridge Shire.</p> <p>Examine latent demand for ad-hoc, bespoke air charters from nearby major centres; initiate discussions with air charter operators in Cairns and/or Townsville.</p>

<p><b>Enhance destination governance and marketing</b></p>	<p>Establish an independently-chaired regional development forum. Encourage participation by the tourism, resources and agriculture sectors in developing a shared, long-term vision for regional development in which tourism is integrated as a central economic pillar.</p> <p>Consider withdrawing from the Tourism Tropical North Queensland RTO in favour of joining the Outback Queensland Tourism Association RTO.</p> <p>Engage a digital marketing agency to identify and implement strategies aimed at maximising the Unearth Etheridge website’s promotional capacity.</p> <p>Engage a digital marketing agency to develop a tailored social media strategy for generating awareness among specified target markets of Etheridge Shire as a tourism destination.</p> <p>Initiate broader regional-level discussions with nearby LGAs regarding the potential to leverage the ‘unearth’ theme into a regional branding strategy which benefits a range of outback Queensland LGAs.</p>
<p><b>Enhance understanding of tourism demand conditions</b></p>	<p>Engage an external agency to design and implement an annual survey of visitors to Etheridge Shire.</p>
<p><b>Respond to key situational conditions</b></p>	<p>Engage external providers to develop and deliver educational programs targeted at enhancing business and community readiness for future tourism development, with a particular focus on service delivery, digital literacy, and engagement with the digital economy.</p> <p>Engage an external agency to examine causes of labour constraints and population migration from within Etheridge Shire, along with the viability of plausible remedial strategies.</p>

# 9. Funding Opportunities

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Clearly, actioning many or all of the recommendations set out in Section Eight will necessitate significant investment. Given that many of the tourism development initiatives recommended link with broader regional, state and federal imperatives, it is vital that Etheridge Shire explore opportunities to access funding and other resource support. Section Nine therefore identifies key programs through which Etheridge Shire may look to in obtaining funding to support future tourism development.

## 9.1 Federal Funding Schemes

Table 9.1 summarises the key federal-level funding opportunities that have relevance to Etheridge Shire's tourism development aspirations. Whilst there are a small range of tourism-specific grant programs on offer through the federal government, many other branches of government provide funding opportunities linked with themes around regional development, business innovation, and Indigenous participation.

It should be pointed out that some grant programs have regular application rounds in which an applicant pitches a bespoke project, whereas other funding opportunities are determined centrally by government agencies themselves. As such, it is crucial that Etheridge Shire continually monitors the federal funding space and balances its efforts between applying for bespoke projects through regular application rounds versus lobbying key government actors. For example, funding for major road upgrades is likely to be the result of targeted lobbying, whereas less significant road upgrades may be funded through opportunities such as the Australian Government's Black Spot program.

## 9.2 State Funding Schemes

Table 9.2 summarises state-based funding opportunities for tourism development within Queensland. As discussed above in Section 9.1, many of the more significant funding opportunities for tourism infrastructure and promotion in Queensland appear to be centrally administered, therefore Etheridge Shire will need to identify opportunities to lobby relevant government actors in order to access similar funding opportunities in the future.

Tourism funding opportunities in Queensland appear to be in a state of flux, with the most recent rounds of significant funding being linked to pandemic recovery, thus it is unclear whether such schemes will be retained in the short to medium term. Again, Etheridge Shire will need to proactively monitor for similar opportunities. In this regard, the Queensland Tourism Industry Council (QTIC) offers a very useful resource to its members by way of the [QTIC Grants Gateway](#). This member-only resource provides updated lists of grants relevant to the tourism sector.

Additionally, businesses within Etheridge Shire may benefit from smaller funding opportunities that have been offered in recent times. These small-scale business grants have been aimed at small businesses in the tourism sector to up skill, grow their capabilities, and prepare for the 'new normal' of tourism in the post-Covid 19 era. Etheridge Shire small businesses should be encouraged to take advantage of these schemes whilst they are on offer.

**Table 9.1 Key federal funding opportunities.**

Funding Body	Grant Scheme	Funding Amount	Description	Link to Recommendations
<b>Australian Trade and Investment Commission</b>	<a href="#">Recovery for Regional Tourism Program</a>	Undisclosed	Assists eligible regions reliant upon international tourism recover from Covid-19 impacts. Focuses on projects that create employment, enhance tourism product quality and grow visitation. Last round closed 30 September 2021.	Capitalise on endowed resources Diversify and enhance created resources
<b>Department of Infrastructure, Transport, Regional Development and Communications</b>	<a href="#">Regional Recovery Partnerships</a>	Undisclosed	Aims to coordinate investments with all levels of government and to support recovery and growth in 10 regions across Australia, delivering jobs and economic diversification.	Capitalise on endowed resources Diversify and enhance created resources
	<a href="#">Culture, Heritage and Arts Regional Tourism (CHART) Program</a>	Up to \$3,000 (plus GST)	Aims to promote domestic tourism into regional and remote parts of Australia to assist community arts and cultural organisations—including museums, galleries and historical societies—to recover from the impacts of COVID-19. Last round closed 29 April 2022.	Diversify and enhance created resources
	<a href="#">Festivals Australia</a>	Undisclosed. 2021 grants ranged between \$7000-\$142,000	Regional artists, arts workers, and organisations can apply for arts and cultural projects that encourage community participation and audience engagement from people living in regional and remote communities in a festival or community celebration. Two rounds each year: February and September.	Diversify and enhance created resources
	<a href="#">Northern Australia Business and Community Growth Program</a>	\$50,000-\$2 million (up to 50% of eligible project expenditure)	Funding for community organisations and other entities (including sole traders and partnerships), to support business growth, improve social and economic infrastructure, increase community amenity and liveability and deliver employment outcomes.	Capitalise on endowed resources Diversify and enhance created resources Respond to key situational



				conditions
	<a href="#"><u>National Cultural Heritage Account</u></a>	Undisclosed	Grant program that assists Australian cultural organisations to acquire significant cultural heritage objects that they could not otherwise afford.	Diversify and enhance created resources
	<a href="#"><u>Black Spot Program</u></a>	Undisclosed	Black Spot projects target those road locations where crashes are occurring. By funding measures such as traffic signals and roundabouts at dangerous locations, the program reduces the risk of crashes.	Improve and leverage supporting resources
	<a href="#"><u>Northern Australia Grants</u></a> (various schemes)	\$50,000-\$2 million (up to 50% of eligible project expenditure)	The grants provided through these programs will fund up to 50 per cent of the total cost of individual projects that support businesses, community groups and Aboriginal and Torres Strait Islander organisations in the north to diversify, scale up operations and thrive.	Capitalise on endowed resources Diversify and enhance created resources
<b>National Indigenous Australians Agency</b>	<a href="#"><u>Indigenous Tourism Fund</u></a> (various schemes)	\$50,000-\$100,000	The Indigenous Tourism Fund (ITF) was developed in consultation with the Indigenous tourism sector and includes business support and grants for Indigenous-owned tourism businesses. The ITF will deliver complementary programs to grow the size and number of Indigenous owned tourism businesses across Australia.  Current Indigenous Business Program round closes 14 June 2022.	Capitalise on endowed resources
<b>Department of Agriculture, Water and the Environment</b>	<a href="#"><u>Australian Heritage Grants</u></a>	Undisclosed. 2021/22 grants ranged between \$47,000-\$440,000	The Australian Government's flagship heritage program. It provides ongoing support to protect and promote National Heritage listed places. The program provides \$5.3 million per annum, with a call for applications each year.  Most recent recipients were announced in March 2022.	Diversify and enhance created resources

**Table 9.1 Key state-level funding opportunities.**

Funding Body	Grant Scheme	Funding Amount	Description	Link to Recommendations
<b>Business Queensland</b>	<a href="#">Small Business Grants</a> (various schemes)	Up to \$5,000	Grants aim to help Queensland small businesses recover, grow and thrive by committing grant funds for businesses to increase key capabilities, embrace innovation, and assist high-growth businesses to capitalise on opportunities. Most recent round closed 17 May 2022.	Enhance destination governance and marketing Respond to key situational conditions
	<a href="#">Business Growth Fund</a>	Up to \$50,000	The Business Growth Fund (BGF) targets high-growth businesses who can accelerate growth, drive Queensland's economy and employ more Queenslanders. Current round closes 30 June 2022	Diversify and enhance created resources
<b>Department of Tourism, Innovation and Sport</b>	<a href="#">Growing Tourism Infrastructure Fund</a>	Undisclosed	\$25 million fund in 2020/21 aimed at assisting Queensland tourism to recover from Covid-19 impacts. Focuses on shovel-ready projects capable of delivering employment, enhances sustainability, and grows visitation growth in terms of visitor nights and expenditure	Capitalise on endowed resources Diversify and enhance created resources
	<a href="#">Outback Tourism Infrastructure Fund</a>	Undisclosed	Established to coincide with the Year of Outback Tourism, the Outback Tourism Infrastructure Fund is helping to transform the region into a destination of choice.	Capitalise on endowed resources Diversify and enhance created resources
	<a href="#">Attracting Tourism Fund</a>	Undisclosed	The \$48.6 million Attracting Tourism Fund (ATF) was established in 2018 to invest in catalytic tourism infrastructure projects in Queensland to grow demand and increase international visitation and overnight expenditure from priority source markets	Capitalise on endowed resources Diversify and enhance created resources
	<a href="#">Queensland Tourism Business Financial Counselling Service</a>	Up to \$2,500 for professional financial advice	Provides free financial counselling support to help tourism operators who have been financially impacted as a result of COVID-19 or a natural disaster. May also fund 50% of professional advice up to \$2,500. Scheme ends 31 December 2022 or until funds exhausted,	Respond to key situational conditions

			whichever comes first. Applications accepted on an ongoing basis.	
<b>Advance Queensland</b>	<a href="#"><u>Regional Futures – Collaborative Projects</u></a>	Up to \$200,000	Grants support regional innovation leaders to collaborate with partners to unlock Queensland's economic potential, whether by solving a significant problem or creating an opportunity for the regions. Current round closes 2 August 2022.	Capitalise on endowed resources Diversify and enhance created resources
<b>Tourism and Events Queensland</b>	<a href="#"><u>Queensland Destination Events Program</u></a>	Between \$10,000 and \$100,000 per year (for up to five consecutive years)	Grants aim to support events that enhance economic activity in the host destination, boost visitation, deliver social benefits for the host community, and boost the host destination's profile. Next round opens July 2022.	Diversify and enhance created resources Enhance destination governance and marketing

# 10. CONCLUSION

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This Directions Paper has presented a situational analysis of tourism as an economic activity within Etheridge Shire. Through the deployment of multiple research methods including comprehensive community consultation, this paper has identified broad-ranging strengths and limitations relating to tourism development which Etheridge Shire should consider in the development and implementation of a future Tourism Masterplan.

***Etheridge Shire is well-placed to deliver unique and authentic tourism experiences themed primarily around its natural geological resources and its traditional economic pillars of mining and agriculture.***

Etheridge Shire is already making positive steps towards developing and promoting tourism in the region, and, in particular, should be applauded for its regional branding strategy, *Unearth Etheridge*. Strong community support for the future development of tourism is also evident amongst key stakeholders including Etheridge Shire Council, the business community, alongside local residents.

***Modest visitation growth to Etheridge Shire can be fostered through a range of low-cost initiatives including coordinated enhancements to tourism product packaging, and a greater focus on cooperative marketing of tourism*** both within Etheridge Shire and with adjacent local government areas. Improvements to existing digital marketing initiatives may yield significant positive impacts relative to cost. This research also identified an opportunity for Etheridge Shire to reconsider its alignment with Tourism Tropical North Queensland. Enhanced regional tourism coordination and promotion may be realised at relatively low cost by exploring synergies with the Outback Queensland Tourism Association RTO.

Although Etheridge Shire already has presence and branding as a tourism destination, there is much work to be done in achieving a tripartite regional economy in which tourism forms one of three pillars alongside mining and agriculture. This research has identified significant challenges Etheridge Shire will need to overcome by ***investing significantly in supporting infrastructure and services that are fundamental for the local community and visitors alike, if the desired economic transformation is to be achieved.***

Local residents and visitors to Etheridge Shire rely upon essential infrastructure and services such as adequate road access, reliable telecommunications, and medical services. Additionally, local businesses, including tourism operators, are reliant upon a critical mass of labour to ensure business continuity. This research identified a strong sentiment from within the community that Etheridge Shire currently falls short in these areas. ***A lack of essential infrastructure and services detracts from destination competitiveness, whilst labour constraints can significantly hamper business functionality.*** Limited visitor accommodation is also a notable issue. Both public and private investment will be required to overcome these gaps and to drive visitor growth.

Assuming gaps in fundamental infrastructure and services are addressed in medium to long term, ***Etheridge Shire would further benefit from investments in diversifying its tourism-specific resources.*** Etheridge Shire has an enviable position of possessing wide-ranging endowed resources whose tourism value may be significantly enhanced through strategic investments in supporting infrastructure. For example, the region's geological features and associated mining heritage could be the basis for a highly appealing, nostalgia-based tourism facility. Meanwhile, construction of trails catering for active mobility may assist in attracting a broader range of visitor segments to the region.

In summary, Etheridge Shire is well-placed to pursue economic transformation through strategic tourism development. ***The region would benefit from further data-driven insights into the demand-side of the tourism market*** in order to forecast visitor uptake of proposed development initiatives. Nevertheless, this Directions Paper has provided a robust foundation for Etheridge Shire's Tourism Masterplan based around thorough community consultation.

# 11. PROJECT MILESTONES

The following milestones were agreed with Etheridge Shire Council.

Service Expected Completion Date(s)

Service	Expected Completion Date(s)
<p>Milestone 1</p> <ul style="list-style-type: none"> <li>• Review of Existing Council/State Strategic Plans related to tourism</li> <li>• Consultation with Councilors and Community Groups</li> <li>• Facilitated consultation with existing RTOs, specifically TTNQ, OQTA, Savannah Way</li> <li>• Survey with local community members on tourism challenges and opportunities</li> <li>• Interviews with community and local stakeholders on vision for tourism</li> </ul>	<p>28<sup>th</sup> Feb 2022</p>
<p>Milestone 2</p> <ul style="list-style-type: none"> <li>• Draft Framework for Directions Paper -APPROVAL BY COUNCIL</li> <li>• Draft Tourism Masterplan -APPROVAL BY COUNCIL</li> </ul>	<p>30<sup>th</sup> April 2022</p>
<p>Milestone 3</p> <ul style="list-style-type: none"> <li>• Final Tourism Directions Paper for Etheridge Shire Council</li> <li>• Final Tourism Masterplan for Etheridge Shire Council</li> </ul>	<p>30<sup>th</sup> June 2022</p>

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# 13. CONTACT US

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For further information or questions about this project please contact the project leader.

Project Lead:

**A/Professor Brent Moyle**

PhD *Monash* BBusCom (Hons) *Monash*

Department of Tourism, Sport & Hotel Management

Griffith Business School

Griffith University | Nathan | QLD 4111 | Australia

T +61 7 3735 4104 | email [b.moyle@griffith.edu.au](mailto:b.moyle@griffith.edu.au)

GU Team:

Prof. Karine Dupre.	Architecture, Planning and Design
Dr. Sheila Peake.	Tourism, Community Development
Dr. Truc Le.	Tourism Risk and Resilience.
Dr Anna Kralj.	Tourism Workforce
Dr Elaine Yang.	Diversity Specialist
Dr Margarida Abreu Novais.	Destination Competitiveness
Dr Matthew Lamont	Sport Tourism, Event Strategy

# APPENDIX A: COMMUNITY SURVEY

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## PREAMBLE

We are seeking community input into the future of tourism in the Etheridge Shire. This survey is completed as part of a broader collaboration between Griffith University and Etheridge Shire Council. Thank you for your time, expertise and engagement in the future of tourism to Etheridge Shire.

You are invited to take part in this study. Please read this Information Sheet in full before deciding whether or not to participate in this research. This information sheet is for you to keep. If you would like further information regarding any aspect of this project, you are encouraged to contact the researchers via the phone numbers or email addresses listed above.

## DRAFT Survey

- 1) As a resident of the Etheridge Shire, is tourism a priority for you? Please use the sliding scale to select your response
  - i. Not a priority
  - ii. Low priority
  - iii. Somewhat priority
  - iv. Neutral
  - v. Moderate priority
  - vi. High priority
  - vii. Essential priority
  
- 2) How important do you think tourism is for the community of Etheridge Shire? Please use the sliding scale to select the level of importance
  - i. Not at all important
  - ii. Low importance
  - iii. Slightly important
  - iv. Neutral
  - v. Moderately important
  - vi. Very important
  - vii. Extremely important
  
- 3) Do you agree, the Etheridge Shire is dependent on tourism? Please use the sliding scale to select your response
  - i. Strongly disagree
  - ii. Disagree
  - iii. Somewhat disagree
  - iv. Neither agree or disagree
  - v. Somewhat agree
  - vi. Agree
  - vii. Strongly agree
  
- 4) How important do you think tourism is for generating economic benefits for local communities? Please use the sliding scale to select your response
  - i. Not at all important
  - ii. Low importance
  - iii. Slightly important
  - iv. Neutral
  - v. Moderately important
  - vi. Very important
  - vii. Extremely important

- 5) Do you agree that tourism generates economic benefits for the community in Etheridge Shire? Please use the sliding scale to select your response
- i. Strongly disagree
  - ii. Disagree
  - iii. Somewhat disagree
  - iv. Neither agree or disagree
  - v. Somewhat agree
  - vi. Agree
  - vii. Strongly agree
- 6) How important is tourism for creating jobs and employment in local communities? Please use the sliding scale to select the level of importance
- i. Not at all important
  - ii. Low importance
  - iii. Slightly important
  - iv. Neutral
  - v. Moderately important
  - vi. Very important
  - vii. Extremely important
- 7) Do you agree that tourism creates jobs and employment for locals of Etheridge Shire? Please use the sliding scale to select your level of agreement
- i. Strongly disagree
  - ii. Disagree
  - iii. Somewhat disagree
  - iv. Neither agree or disagree
  - v. Somewhat agree
  - vi. Agree
  - vii. Strongly agree
- 8) How important do you think tourism is for conserving and enhancing cultural values and heritage? Please use the sliding scale to select the level of importance
- i. Not at all important
  - ii. Low importance
  - iii. Slightly important
  - iv. Neutral
  - v. Moderately important
  - vi. Very important
  - vii. Extremely important
- 9) Do you agree that tourism conserves and enhances cultural values and heritage in the Etheridge Shire? Please use sliding scale to indicate your agreement
- i. Strongly disagree
  - ii. Disagree
  - iii. Somewhat disagree
  - iv. Neither agree or disagree
  - v. Somewhat agree
  - vi. Agree
  - vii. Strongly agree
- 10) How important do you think tourism is in maintaining and enhancing quality of life of local communities? Please use the sliding scale to select the level of importance
- i. Not at all important
  - ii. Low importance
  - iii. Slightly important
  - iv. Neutral
  - v. Moderately important

- vi. Very important
- vii. Extremely important

11) Do you agree that tourism maintains and enhances the quality of life for locals in the Etheridge Shire? Please use sliding scale to indicate your agreement

- i. Strongly disagree
- ii. Disagree
- iii. Somewhat disagree
- iv. Neither agree or disagree
- v. Somewhat agree
- vi. Agree
- vii. Strongly agree

12) How important do you think tourism is for conserving and enhancing environments and habitats? Please use the sliding scale to select the level of importance

- i. Not at all important
- ii. Low importance
- iii. Slightly important
- iv. Neutral
- v. Moderately important
- vi. Very important
- vii. Extremely important

13) Do you agree that tourism contributes to the enhancement of the environment and habitat in the Etheridge Shire? Please use sliding scale to indicate your agreement

- i. Strongly disagree
- ii. Disagree
- iii. Somewhat disagree
- iv. Neither agree or disagree
- v. Somewhat agree
- vi. Agree
- vii. Strongly agree

14) How important do you think tourism is for enhancing the resilience of local business in regional communities? Please use the sliding scale to select the level of importance

- i. Not at all important
- ii. Low importance
- iii. Slightly important
- iv. Neutral
- v. Moderately important
- vi. Very important
- vii. Extremely important

15) Do you agree that tourism enhances the resilience of local businesses in the Etheridge Shire? Please use sliding scale to indicate your agreement

- i. Strongly disagree
- ii. Disagree
- iii. Somewhat disagree
- iv. Neither agree or disagree
- v. Somewhat agree
- vi. Agree
- vii. Strongly agree

16) From your perspective, please drag and drop the 5 most critical tourism-related issues affecting the Etheridge Shire into the tabs below.

- a. Critical Issue 1
- b. Critical Issue 2

- c. Critical Issue 3
- d. Critical Issue 4
- e. Critical Issue 5

Selection of items to be included in tabs – we should include between 10 and 20 items to drag and drop with an ‘other’ option.

Access – Roads, Air, Train	Community engagement/ support	Roads between towns	Support from Council /Qld Tourism organisations
Limited tourist season	Staffing / training for staff for tourism	Investment in tourism product and infrastructure.	Making towns more attractive and involved
Visitor services eg Accommodation, RV sites Food supplies/meals	Linkage with other tourism areas outside Etheridge Shire	Collaboration between tourism businesses	Marketing region
Mobile/internet connectivity	Visitor Information available / signage	General disinterest in tourism	Tourism strategy
Free Camping	Tourist behaviour	Host-guest interaction	OTHER (please specify)

17) Do you support further enhancement of tourism experiences in the Etheridge Shire?

- i. Very strongly oppose
- ii. Strongly oppose
- iii. Somewhat oppose
- iv. Neutral
- v. Somewhat favour
- vi. Strongly favour
- vii. Very strongly favour

18) From your perspective, which areas of the Etheridge Shire would you support further investment in tourism?

- a. Cumberland Dam
- b. Charleston Dam
- c. Visitor Information Centre
- d. Copperfield George
- e. OTHER location (please specify)
- f. No further investment

19) From your perspective, what types of tourism experiences would you support further enhancement of? Tick Box – select all that apply. (OR SHOULD BE MEASURE PREFERENCES AND ASK TO RANK?)

Birdwatching	Geology / Gems Trail	Museums
Mountain biking	Biodiversity trails – i.e natural features, gorges, water, animals, plants	Indigenous trail
Fishing	Heritage trails – ie mining history/ early settlers / towns no longer here.	Astrophotography
Picnic Areas	Water sports	Farm stays
Sporting Events	Events	OTHER (please specify)

20) What do you think the Etheridge Shire Council can do to support tourism development in the region?

OPEN

21) Would you like to be involved in a leadership group to oversee tourism development in the Etheridge Shire?  
Binary – Yes/No



22) Finally, do you have any other views or comments you would like to express about tourism in the Etheridge Shire

OPEN

23) How old are you?

OPEN

24) Your sex:

Female

Male

25) Where is your usual place of residence in the Etheridge Shire?

Georgetown

Einasleigh

Forsayth

Gilbert River

Mount Surprise

Abingdon Downs

Conjuboy

Gilberton

Lyndhurst

Northhead

Strathmore

Talaroo

OTHER (please specify)

26) Do you run a business in the Etheridge Shire?

Yes

No

27) If yes, please select the category that best describes your business.

Visitor attraction

Visitor accommodation

Retail

Restaurant/ café

Tour operator/ guide

Nature-based tourism activities e.g. adventure activities etc.

Event

OTHER (please specify)

# APPENDIX B: REGIONAL DESTINATION COMPETITIVE ANALYSIS

Tagline	Signature Experiences	Self-Drive Route	Natural Attractions	Hot Springs	Paleo Tourism	Mining Heritage	Museum	Indigenous Tourism	Signature Events	Others
<b>Tourism Tropical North Queensland RTO</b>										
<b>Etheridge Shire</b>										
<i>Unearth Etheridge</i>	Undara lava tubes Gems and gorges Gold mining heritage Hot springs	Savannah Way	Cobbold Gorge Copperfield Gorge Undara Lava Tubes	Talaroo Hot Springs		Gold mining Gem and gold/agate fossicking 'Forsayth by Night Lantern Tour'	TerrEstrial Centre Ted Elliot Mineral Collection	Talaroo Hot Spring	Undara Outback Rock and Blue Georgetown Rodeo	<i>Savannahlander</i> Scenic train
<b>Burke</b>										
<i>Burketown, naturally</i>	Barramundi fishing, Morning Glory Clouds, Indigenous tour, fossil	Savannah Way	Gulf of Carpentaria, Boodjamulla National Park (Lawn Hill gorge), Gregory River, salt pans		Riversleigh World Heritage Site			Yagurli Tours	World Barramundi Fishing Championships, Morning Glory Festival	

Tagline	Signature Experiences	Self-Drive Route	Natural Attractions	Hot Springs	Paleo Tourism	Mining Heritage	Museum	Indigenous Tourism	Signature Events	Others
<b>Carpentaria</b>										
<i>Discover Carpentaria; Outback by the sea</i>	Barramundi fishing Morning Glory Clouds Wetlands Port Rodeo	Savannah Way	Gulf of Carpentaria Mutton Hole Wetlands				Barramundi Discovery Centre Indigenous Stock Workers and Rodeo Riders Displays		Outback by the Sea Festival Normanton Rodeo	Scenic train
<b>Croydon</b>										
<i>Historic gulf savannah region, outback adventure</i>	Gold mining heritage Locomotive	Savannah Way	Lake Belmore			Gold mining	True Blue Visitor Information Centre Mining Museum			
<b>Mareeba</b>										
n/a	Food Rainforest Kuranda – Skyrail, scenic railway, village Wildlife	Savannah Way	Chillagoe Caves Mareeba Tropical Savanna and Wetland Reserve		Live size replica of dinosaur	Gold and copper mining	Mareeba Heritage Museum	Kuranda Village (rainforest walk with Aboriginal guide)	Mareeba Rodeo Multicultural Festival Great Wheelbarrow Race	Kuranda Village Hot air balloon Coffee plantation

Tagline	Signature Experiences	Self-Drive Route	Natural Attractions	Hot Springs	Paleo Tourism	Mining Heritage	Museum	Indigenous Tourism	Signature Events	Others
<b>Tablelands Regional</b>										
<i>Touch the top: Discover the real Atherton Tablelands</i>	Waterfalls High altitude Food Picturesque villages	Savannah Way	Multiple waterfalls Lake Barrine, Mt Hypipamee Crater Lake Tinaroo	Innot Hot Springs		Tin, copper and silver mining Gem fossicking	Heberton Mining Museum and Information Centre		Torimba Festival of the Forest	Gastronomy (dairy, chocolate, liquor, wine, food and wine tour)
<b>Outback Queensland Tourism Association RTO</b>										
<b>Cloncurry</b>										
<i>The friendly heart of the outback</i>	Mining heritage Aviation heritage Equestrian sport	Overlander's Way	Open Cut Mine Chinaman Creek Dam			Mary Kathleen Uranium Mine (abandoned), fossicking	John Flynn Place Museum and Art Gallery Kathleen Memorial Park and Museum Cloncurry Unearthed Museum		Curry Merry Muster Festival, Curry Races	Original Qantas hangar
<b>Flinders</b>										
<i>Come on a journey, outback</i>	Unique and prehistoric landscape	Overlander's Way	Porcupine Gorge, Flinders		Dinosaur and marine fossil		Flinders Discovery Centre		Porcupine Gorge Challenge	

Tagline	Signature Experiences	Self-Drive Route	Natural Attractions	Hot Springs	Paleo Tourism	Mining Heritage	Museum	Indigenous Tourism	Signature Events	Others
<i>town, endless opportunities</i>	Dinosaur fossils		River							
<b>McKinlay</b>										
<i>At the Creek: Water, country, people</i>  <i>Experience the McKinlay Shire</i>	Outback lifestyle Movie set Festival	Overlander's Way	Combo Water Hole		Fossil	Silver, lead, zinc mining	At the Creek Duncan McIntyre Museum McKinlay Museum		Dirt 'n' Dust Festival	Artesian Bathhouses
<b>Mt Isa City</b>										
<i>See the other side of Queensland</i>  <i>Discover Mount Isa, an oasis in the Outback, a city rich in history and culture and your starting point for true</i>	Oasis Underground mining tour	Overlander's Way	Boodjamulla (Lawn Hill) National Park Camooweal Caves National Park Lake Moondarra		Fossil	Copper, silver, lead and zinc mining 'Hard Times Mines Underground Tour'	Outback at Isa Visitor Centre Riversleigh Fossil Centre Isa Experience Heritage Display WW2 Underground Hospital and Museum, The		Mt Isa Mines Rodeo Shack at the Outback	

Tagline	Signature Experiences	Self-Drive Route	Natural Attractions	Hot Springs	Paleo Tourism	Mining Heritage	Museum	Indigenous Tourism	Signature Events	Others
<i>Outback adventures.</i>							Drover's Camps Museum			
<b>Richmond</b>										
n/a	Dinosaur, fossil	Overlander's Way	Lake Fred Tritton		Dinosaur and marine fossil		Kronosaurus Korner	Bush Tucker Gardens		
<b>Townsville Enterprise Ltd RTO</b>										
<b>Charters Towers</b>										
<i>Unearth our secrets</i>	Arts Gold mining heritage Texas Longhorn	Overlander's Way	White Blow Environmental Park Burdekin River			Gold mining, 'Ghost of Gold' heritage trail Gold fossicking			Country Music Festival, Great Australian Bites	Texas Longhorn Cattle: Wagon tours and safaris