Somerset
REGIONAL COUNCIL

THE STAFFORD GROUP

SOMERSET REGION DESTINATION MANAGEMENT PLAN & DESTINATION MARKETING BRAND

Prepared for Somerset Regional Council

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1. EXECUTIVE SUMMARY

The Stafford Group (The Group) were engaged by Somerset Regional Council (Council) to develop a Destination Management Plan (DMP) and a Destination Marketing Brand for the Somerset region.

This DMP provides recommendations for both product development and marketing/branding initiatives to help grow Somerset's tourism offering in a sustainable manner and to deliver benefits to local tourism businesses and the wider local community.

The DMP also provides a road map for Council to ensure tourism develops with the support of industry and the broader community.

1.1. KEY FINDINGS

The Group completed a detailed literature review and undertook a number of field trips to the Somerset region in order to gather feedback from a variety of stakeholders and to assess sites and facilities. The key findings identified are as follows (note these are not in priority order):

- The region's existing brand and destination position is unclear which makes it difficult, at times, for visitors to fully understand the attributes which Somerset has as a tourism destination;
- There is a lack of an adequate online presence to help stimulate greater visitor interest and to help market product, however, there is a strong desire by all stakeholders to create a dynamic website possibly controlled and managed by Council;
- The tourism industry appears to have historically suffered from a lack of coordination and industry have commented that it has been fragmented. We understand that this is now being addressed through Council initiatives, including via Council's Tourism Advisory Committee;
- There are limited recreational facilities and family-oriented activities to help entice a broader visitor market, though this may be able to be addressed through more facilities in and around the Wivenhoe and Somerset dam lakes managed by Seqwater. Seqwater have indicated their desire to now focus more strongly on offering tourism and recreational facilities;

- The quality of food and beverage is highly variable throughout Somerset, however, it would appear to mostly meet the needs of the current visitor markets. With the potential to expand into a broader visitor market base, the opportunity exists to consider increasing food and beverage options (including raising the standards of food and beverage service and the range of food options) when market demand supports this;
- To help support future growth and a broader visitor market, there may be a need to expand existing accommodation facilities as well as creating new ones when market demand supports this. Industry feedback indicates that the current level of demand already supports the necessity for more holiday park facilities.[1] Industry feedback indicates that the region is perceived to be primarily a drive through day visitor destination. Feedback received also highlighted that it is difficult to secure events/conferences as there is insufficient accommodation supply for attendees to stay overnight;
- Somerset has a number of good quality bed and breakfast establishments but the region also has a number of accommodation establishments (B&Bs, motels and holiday parks) which are in need of enhancement and refurbishment to better meet the visitor market's expectation;
- Limited shop trading hours, particularly over the weekend and evenings, is creating the perception that Somerset is not open during these periods;
- There is limited built product and activity based experiences available to expand the day visitor market or to encourage the overnight visitor market to stay longer;
- Open space areas are not enough as an attractor for visitors and the creation of recreational and family-oriented facilities (holiday parks etc.) are important new product elements to be considered; and
- The proximity of Somerset to Brisbane and the Gold Coast in particular, offer Somerset access to a number of growing interstate, intrastate and international niche markets which can be developed sustainably over time based on Somerset's current and future product mix.

1.2. OPPORTUNITIES

As part of the DMP process, The Group identified a number of priority development and/or marketing opportunities to grow tourism in the Somerset region on a sustainable basis. The figure on the following page reflects these initiatives. These have been segmented into short, medium and long term recommended initiatives. Whilst some of these opportunities would need to be facilitated by Council as the lead agency, others would be the responsibility of major asset owners, such as Seqwater and industry operators.

[1] Covers camping areas, glamping areas, powered and unpowered tend sites and cabins, as well as potential water park elements

The opportunities which should be the responsibility of Council to facilitate are highlighted in the table with an asterisk.

It is important to note that whilst the need for Council involvement is required with quite a few initiatives, the implication for Council is related to staff time rather than capital investment. There are relatively few areas where Council would need to invest funds and, where this does occur, it is often able to apply for grant funding from State or Commonwealth Government sources.

FIGURE 1: SHORT MEDIUM AND LONG TERM OPPORTUNITIES

SHORT TERM	MEDIUM TERM	LONG TERM
▪ Somerset Brand roll out* ▪ Stronger online presence through a dynamic website managed by Council* ▪ Holiday park expansion ▪ House boats feasibility study ▪ Undertake accommodation sector audit* ▪ Development of koala/deer precinct ▪ Wildlife photo shoot trekking ▪ Creation of an aviation heritage trail* ▪ Canoe trails and hire facility ▪ Packaging of product ▪ Integration into Brisbane Marketing's new website* ▪ Development of template for VIC data collection* ▪ Undertake visitor services/ VIC review* ▪ Touring routes with neighbouring regions ▪ Event strategy*	▪ Water edge chalets ▪ Development of walks and treks* ▪ Assessment for lake tours ▪ Fishing and boat hire ▪ Development of water skiing event ▪ Mountain biking strategy* ▪ Establish journalist famil program* ▪ Fishing and fresh food festival* ▪ Partner with neighbouring regions for product packaging* ▪ community tourism awareness program* ▪ Create tourism investment prospectus* ▪ Development of signage strategy (way finding and interpretative)*	▪ Aviation history museum* ▪ Fresh water interpretive centre

1.3. VISITATION

The table below (Table 1) offers a snapshot of estimated visitation to Somerset (as at 2013) and provides a base level of data for Somerset Regional Council and industry stakeholders to build on.

As the Regional Tourism Organisation's[2] visitation figures do not provide a breakdown of visitation (including market segmentation) for the Somerset region, the visitation data has been developed by utilising:

- Confidential visitor data gathered from individual tourism operators based on accommodation occupancy levels within the region;
- Operator estimates of day visitation;
- Discussions with Tourism and Events Queensland on likely visitation levels;
- Broad regional data provided by Brisbane Marketing including market segmentation; and
- Assessment of visitation to surrounding regions (Toowoomba, Southern Downs and South Burnett, Lockyer Valley, Ipswich) as a check and balance based on our knowledge of these surrounding regions and our recent work with them.

The results reflect the strong overnight intrastate and day tripper market, primarily originating from regional source markets (South East Queensland, Ipswich, Toowoomba and the Western Downs).

TABLE 1: SOMERSET ESTIMATED VISITATION 2013 – MAIN PURPOSE OF VISIT[3]

2012 Estimated Market Share by Main Purpose of Visit							
	Leisure o/night	Business o/night	Conference o/night	VFR/ Education/ Other O/night	Day Trippers Drive Thru	Totals	Market Share
Interstate	18,500	200	120	1,150	31,978	**51,948**	14%
Intrastate	197,500	2,550	1,200	4,360	119,500	**325,110**	85%
International	2,950	105	80	250	2,100	**5,485**	1%
Totals	**218,950**	**2,855**	**1,400**	**5,760**	**153,578**	**382,543**	**100%**
Market Share	**57%**	**0.7%**	**0.4%**	**2%**	**40%**	**100%**	**-**

[2] Somerset's regional tourism organisation is Brisbane Marketing

[3] Based on estimates determined through consultation, through current broader visitor data for the Brisbane region (for the most current period 2013) and through The Group's experience in other similar regions (Lockyer Valley, Ipswich, Toowoomba Golden West, Southern Downs etc). A more detailed description of the methodology utilised, please see Section 4.1).

The research and analysis undertaken as part of this DMP indicates that the following market segments are likely to provide the greatest growth potential for the Somerset region.

FIGURE 2: SOMERSET PRIMARY AND SECONDARY FOCUS MARKETS

PRIORITY PRIMARY MARKETS

- Day trip visitors ex Brisbane and Gold Coast for recreation mostly focused on the lakes and outdoor pursuits;
- Ecotourism focussed visitors (particularly bird watchers);
- Day sports-based tourism and sports events participants and attendees; and
- Semi retirees and retirees looking for accessible recreational facilities within easy driving distances of Brisbane and SEQ.

SECONDARY MARKETS

- Backpacker Tourism (associated with active and passive recreational activities);
- Education Tourism and International Student Markets focussed on day excursions); and
- Short break market ex Brisbane, Melbourne and Sydney for passive recreational pursuits mostly around the dam lakes, art and heritage trails and organised coach groups.

1.4. COUNCIL'S ROLE IN TOURISM

Council has strategically elected to take a leadership role (through its Tourism Advisory Committee) to help drive sustainable tourism growth throughout Somerset for the future. For many councils, the traditional role performed in tourism involves:

- Managing holiday parks which are often council owned assets;
- Providing sporting and open space facilities for recreation (locals and visitors to use);
- Providing gateway signage and interpretative signage to places of interest;
- Providing visitor services often via high quality web sites and the more recent introduction of mobile apps and to a lesser extent the traditional visitor information centres;
- Coordinating a calendar of community and visitor events;
- Facilitating State and Federal grant applications for new infrastructure investment;
- Providing advisory assistance to local tourism organisations;
- Liaising with regional tourism organisations to push for greater marketing activity;
- Developing memorandums and prospectuses to encourage investment and development; and
- To generally work closely with local tourism operators, investors and developers to encourage new forms of development to entice a broader and higher spending visitor base.

For many rural and regional councils, there is also inevitably a balancing issue trying to preserve the lifestyle needs of the local community[4] whilst supporting the need for economic growth and community prosperity which can lead to greater development and investment.

Somerset Regional Council has a pivotal role in developing the benefits of tourism through:

- Continuing to coordinate the needs of industry and balancing this with Council's other strategic requirements focused on community needs, economic growth initiatives and environmental protection;
- Ensuring Council town planning processes and policies pro-actively assist and encourage new forms of tourism development and investment[5] which offer sustainable development outcomes for the region;
- Ensuring communications from Council to the tourism industry (in the region and externally), reflect a message that Council is open for business[6] and wishes to actively encourage new investment to grow the tourism sector;
- Developing a tourism investment and development memorandum to indicate to potential investors and developers the types of investment opportunities Council is more likely[7] to support and which offers investors greater certainty;
- Reassessing Council's current investment into the two existing and one planned visitor information centre and looking at the changing market desire for more online visitor support through a Council managed dynamic website and potential mobile app to better meet market needs;
- Creating an events strategy, including working with industry to facilitate events which can help raise the region's profile and which may offer a gradual and sustainable way of growing visitation and visitor yield;
- Building a database of robust visitation data[8] through introducing a system for collecting visitor statistics[9] on a quarterly basis from all accommodation outlets, the VICs, cafés and

[4] Particularly for retirees who often are more concerned with preserving their lifestyle – way of life and not so interested in economic growth and employment and new investment if this is seen to impact on their quality of life through more visitors, more traffic, more noise and possibly higher rates.

[5] Councils generally prefer to have private sector investment into new tourism development rather than committing council funding. The exception is where council has land which is strategically located for tourism and where council can contribute land in order to better leverage private sector investment.

[6] Whether Council has land or other assets to contribute to new tourism investment or not, Council town planning documentation (LEPs, DCPs etc.) and the way its planners interpret Council and State Government planning policies and procedures to allow for new development, sends a clear message to developers regarding whether Council is a strong supporter of tourism or not. The more proactive and supportive the Council procedures and approaches are towards tourism development, the more likely development will occur and developer interest stimulated.

[7] Whilst this does not guarantee that a development application will be supported by Council, it does tell the investment community what types of development Council would prefer to see.

[8] This is needed to help with informed decision making, to reduce the reliance on anecdotal information sources and recognising that visitor data captured by Brisbane Marketing (the RTO) does not offer a robust empirical base of visitation statistics for Somerset or a number of other regional rural areas because of the small sample sizes gathered.

restaurants (important to gather data on day visitors), from art galleries, visitor attractions and activity operators (4WD parks, rail trail visitors, those coming for recreation including fishing, water skiing etc.);

- Working more closely with Seqwater, who as the manager of the largest tourism assets within the region, and a significant land holder, need to be partnered with to drive visitor growth utilising the assets at their disposal;
- Looking to improve signage into and within the Somerset region via digital technology (online app for directions, websites for maps rather than traditional highway road signage); and
- Leveraging off the lakes and recreational opportunities to tie in with the branding recommendation noted below.

1.5. BRAND POSITION

The brand positioning for Somerset should ideally align with the brand currently being developed by Brisbane Marketing to enable Somerset to leverage off the RTO's marketing initiatives. We understand that this initial brand development is the first stage of a process which Council will drive to create a workable destination brand supported by the research and analysis in this DMP.

1.6. SUMMARY

Recommendations provided in this DMP focus on strategic options to support and potentially guide, Council's involvement in tourism. They also identify the *lower hanging fruit options* and identify branding, market development, product development and tourism investment opportunities which can be used as stimulants to refocus and motivate local industry and investors to develop, enhance and upgrade their facilities and service.

Somerset has the potential to develop as "South East Queensland's Natural Playground", capitalising on its close proximity to the major urban areas and noting good road access from the Sunshine Coast, Brisbane and the Gold Coast.

Importantly, tourism will need to develop carefully and at a pace which allows the community to derive comfort that the level of growth is well managed and sustainable. Council will also need to take a strong leadership role in working with industry and major partners such as Seqwater to grow opportunities and encourage new investment to occur.

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[9] This should include postcodes, length of visitor stay in region, estimated visitor expenditure, number of people travelling in party, main purpose of visit.

2. INTRODUCTION

The Stafford Group (The Group) were engaged by Somerset Regional Council to develop a Destination Management Plan (DMP), including a destination marketing brand for the Somerset region.

The primary objectives of the DMP include:

1. **To identify opportunities and options to assist the development of a feasible and sustainable tourism and recreation industry based on Somerset's intrinsic qualities**
2. **To inform planning and development strategies in order to support future growth**
3. **To provide a medium-term overarching vision of tourism in the region, including strategies for achieving that vision**

2.1. METHODOLOGY

Based on agreement with Council, the following approach has been followed:

- Structured meetings with Council personnel;
- Review of background reports and studies on tourism and related sectors and areas;
- Collation and review of relevant visitor data and a broader economic sector data;
- Stakeholder consultation with operators within the region to discuss challenges and opportunities going forward;
- Stakeholder discussions with Tourism and Events Queensland, Brisbane Marketing and Seqwater as well as other relevant agencies;
- Creation of a draft Destination Management Plan and the facilitation of a workshop with the Project Steering Group to discuss key findings; and
- After appropriate feedback the finalisation of the Destination Management Plan and Brand Positioning.

The Group wishes to thank Council and key stakeholders for the time and effort put into this exercise. In addition, we wish to express our appreciation to operators and other stakeholders who have provided data and information on a confidential basis in order to help determine the best outcomes for the Somerset region as a tourism destination.

3. CONTEXT

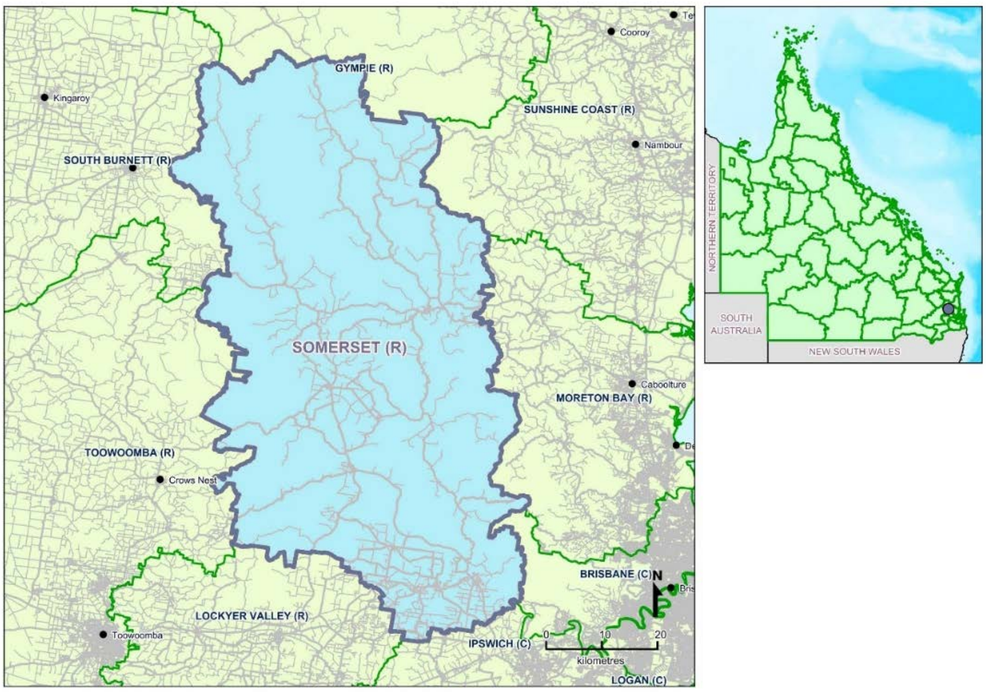
3.1. THE SOMERSET LGA

Somerset LGA is located roughly 100km northwest of Brisbane and covers approximately 5,387 square kilometres. The LGA is home to 22.5k residents[10], providing rural residential living, significant areas of rural production and several important conservation areas.

The Somerset region also contains the Somerset, Wivenhoe and Atkinson Dams which form an integral part of the water catchment area for South East Queensland. Importantly, these dams also offer water-based recreational and tourism product (boating, canoeing, fishing, jet skiing, kayaking, sailing, swimming etc.) which is the focus of visitation to the region.

The figure below illustrates the scale of the region in the context of surrounding regions and the close proximity to Brisbane and South East Queensland as major urban conurbations and easily accessible visitor markets.

FIGURE 3: MAP OF THE SOMERSET REGION



[10] Estimated Resident Population, Local Government Areas, Queensland, ABS, 30 August 2013

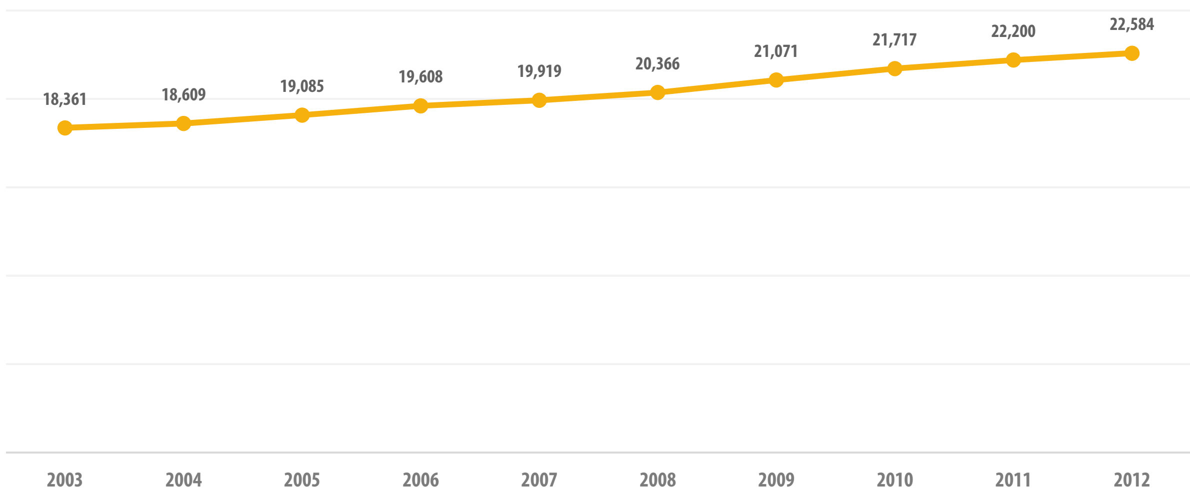
There is significant opportunity within the region to develop a range of trails (aviation trails, boutique wine trails and linking in with food trails through the Lockyer Valley) as well as a range of packages (food, accommodation, transport etc.) in order to encourage greater visitor dispersal throughout the Somerset LGA.

It is also important to note that visitors do not recognise local government boundaries so opportunities which can leverage off product in neighbouring regions need to be considered. Examples include the boutique wineries in South Burnett and the food trails in The Lockyer Valley.

3.2. POPULATION

Whilst the Somerset regional population has grown by 23% over the last 10 year period, this has occurred from a relatively low base.

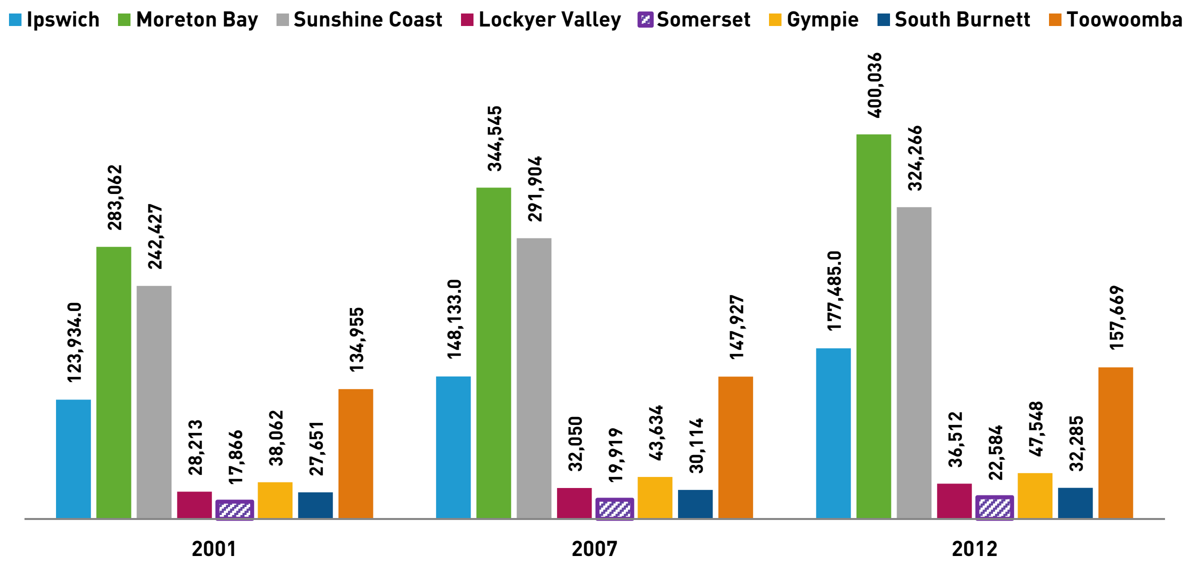
FIGURE 4: 10 YEAR POPULATION GROWTH - SOMERSET[11]



As tourism relies on a ready supply of skilled and semi- skilled labour, the ability of the local population to fill the labour requirements is often stretched. There is often a need to encourage a wider regional employment market to fill jobs unable to be filled locally. Therefore, the population growth in neighbouring LGA's such as Ipswich, Sunshine Coast, Lockyer Valley and others are important considerations to note for accessing potential employees as local businesses expand and new tourism ventures start up.

[11] Estimated Resident Population, Local Government Areas, Queensland, ABS, 30 August 2013

FIGURE 5: SURROUNDING LGA POPULATION GROWTH SUMMARY[12]



The Somerset region has a higher median age than the Queensland State average (41.7 years compared with the Queensland State average of 36.6 years) which may have bearing on the number of available younger people able and willing to work in tourism employment. Ensuring that there is a local reliable workforce either from within the Somerset region or further afield will be an important consideration to help tourism grow on a sustainable basis. This is a major issue for most regional destinations who are now relying heavily on working holiday makers from overseas to fill tourism and hospitality jobs.

3.3. SWOT ANALYSIS

As part of the overall context for the Somerset region a SWOT analysis has been created based on structured interviews with stakeholders and the research and analysis undertaken by the project team.

The table on the following page provides a breakdown of the relative strengths, weaknesses, opportunities and threats for Somerset as a tourism destination.

[12] Estimated Resident Population, Local Government Areas, Queensland, ABS, 30 August 2013

TABLE 2: SWOT ANALYSIS

STRENGTHS	WEAKNESSES
▪ Proximity to Brisbane, Sunshine Coast, Gold Coast and Ipswich ▪ New branding for the wider region created by Brisbane Marketing ▪ State and Federal Government desire for tourism as a major economic driver ▪ Size, scale and proximity of Somerset, Atkinson and Wivenhoe Dams and their associated recreational use ▪ Proximity to international airport (Brisbane) ▪ General quality of road infrastructure ▪ Rural vistas and views and lifestyle ▪ Availability of Lung Fish in the Seqwater lakes ▪ Fishing and hunting ▪ Iconic fauna populations (koalas) ▪ Low level of urbanisation and high percentage of open space areas	▪ Level of human resource capacity in the region (skills and number of available staff) ▪ Volume of accommodation product is limited ▪ Rooms are often in need of refurbishment ▪ Lack of evening activity to cater to and to expand the overnight visitor market in particular ▪ Limited number and variety of restaurants/cafes to appeal to a broader visitor market ▪ Unclear demarcation in roles between Council and industry association ▪ Limited communication amongst all key stakeholders to activate opportunities ▪ Limited product to appeal to day visitors ▪ Lack of statistical data ▪ Many lifestyle operators rather than stronger commercial operators

OPPORTUNITIES	THREATS
▪ Market potential for events ▪ Development of koala precinct ▪ Expansion of lake based development ▪ Development of a range of touring routes, trails and tours (kayaking, trekking, mountain biking, aviation trail etc.) ▪ Integrated website for the region (and/or linking in the Brisbane Marketing's new website) ▪ Promotion of bird watching ▪ Development of school education programs and visits ▪ Introduction of technology solutions for visitor servicing and stronger visitation signage ▪ Introduction of expanded and new accommodation (holiday park expansion, chalets, fishing lodge) ▪ Packaging of product within the region and with neighbouring regions to pro- actively stimulate stronger visitation ▪ Linking to Queensland Drive Strategy for promotions and raised awareness	▪ Major floods, droughts and other natural events which the region has already encountered extensively over the last 12 years ▪ High Australian dollar and discounted airfares encourages more outbound travel ▪ Industry apathy to change ▪ Community resistance to change ▪ Competition from surrounding areas through stronger product mix and investment ▪ Coal seam gas development ▪ Ageing/declining population ▪ Lack of public transport

3.4. TRENDS

The following provides an overview of regional, state and national trends which may currently, or could in the future, impact the Somerset region's ability to successfully grow tourism. These trends are focused particularly on tourism, but also include economic development, environmental management, governance and social wellbeing.

TABLE 3: TRENDS AND THEIR IMPLICATIONS[13]

TREND	IMPLICATION OF TREND FOR SOMERSET
Tourism continues to grow internationally	World Tourism Organisation figures highlight continued growth in travel globally, with constant growth in all sectors; leisure, business, conferencing, visiting friends and relatives, MICE, education trips, food tourism, cruise, special interest markets etc. Even with the recent global financial crisis, worldwide tourism figures overall have reflected growth. City-based market segments constantly look for new day trip and overnight destinations. The development of new visitor experiences and activities in Somerset can pick up on the major urban conurbation of SEQ's desire for new and easily accessible experiences (particularly because there has been a lack of new tourism product created in and around SEQ for some time). Whilst tourism is not recession proof, it is far more resilient than previously, as visitor markets often view tourism and travel as a necessity[14] rather than a luxury. This equates to more day trippers coming to regions such as Somerset to escape city based areas.
Developing countries are the standout for medium term growth	The rapid growth of visitor generating markets, such as many of those in South Asia, are already well targeted by Tourism and Events Queensland. These visitors, coming in increasingly larger numbers, are not just after the city based experience which Brisbane can offer. They visitors are also keen to visit coastal areas and, where they can access suitable and appealing product, inland areas. Somerset is close to Brisbane and the Gold Coast and dependent on the product able to be created, could start to develop tours for these visitors. Even simple activities such as fishing and fruit picking can have strong appeal to a number of these international visitor markets who may only visit as day visitors, preferring to stay in city based accommodation.
Growth in those coming from Asia	Queensland is experiencing an increase in visitors coming from Asia, (particularly China, India, Indonesia and Malaysia) but many regions are not yet ready with product or service standards to capitalise on the growth potential. Somerset has potential in developing inbound tours ex Gold Coast and Brisbane if it can link into local tour operators and market desire for day fishing tours, fruit picking and passive tours to look at scenery etc. Introduction

[13] Trends have been sourced from The Future of Tourism in Queensland (a report developed by CSIRO for the Queensland Government, from Tourism and Events Queensland and Tourism Australia material and from The Group's own research.
[14] The need to visit new places (event for day trip experiences) to help with social wellbeing, to get out of the rat race, to visit places of natural beauty, to find locations to just sit, relax and contemplate, and to find new locations for passive and active recreational pursuits. Somerset has the potential to deliver on all of these physiological needs.

TREND	IMPLICATION OF TREND FOR SOMERSET
	of a purpose built Asian style restaurant to offer appropriate food options and, possibly in a highly attractive rural setting, may help grow the day visitor market and also generate investor interest. Supply of appropriate product has to drive demand from these Asian markets.
A growing middle class	Greater prosperity not only within Australia but internationally is rapidly growing the visitor markets with the disposable income required to go travelling. After visitor markets tick off the major local destinations of interest (Gold Coast and Sunshine Coast for example), they tend to go looking for the next level of visitor experiences. As long as Somerset has the products to entice the domestic market who are looking for new passive and active experiences and new events, it can benefit from this growing cohort of mostly domestic visitors looking for new experiences within easy access of Brisbane, the Gold and Sunshine Coast. Somerset needs to be mindful that competition is intense for capturing the domestic market in particular, especially those interstate visitors basing themselves in the Sunshine or Gold Coasts and looking for hinterland day trips.
Changing cultural and entertainment tastes of Chinese tourists	Initially, visitation ex China was via highly structured tours. As this market has matured, so has the need for new experiences which they can undertake in smaller groups (mini bus sized special interest tours) and as family groups (using rental cars to explore). The desire now exists to travel as free independent travellers and without venturing too far from major gateway cities such as Brisbane and the Gold Coast. Somerset is geographically well located to pick up on this changing market need especially as this maturing market wants to sample local produce (especially quality meat and seafood) and undertake day trip tours ex Brisbane.
New competition for Queensland - Developing countries are heavily investing in tourism	The challenge for Queensland (and Somerset specifically) is that the level of competition from developing countries to attract tourists is intense and the level of investment occurring is significant. Without new investment occurring into new tourism product within Somerset to attract local, intrastate, interstate and international visitors, visitor growth opportunities are likely to be slow to eventuate and potentially may not occur at all. From work undertaken in the surrounding regions, we note that most councils are actively looking to encourage investment and development into new and improved facilities in order to grow their share of visitor numbers and more importantly visitor yield.
Older age groups have different travel preferences to other age groups	Somerset should be able to offer greater appeal to older age groups (often coming on tour buses such as Probus Clubs) looking for more passive based experiences. These groups are already visiting, but are mostly passing through on tour buses, so their economic contribution to Somerset is minimal. New product is needed to encourage them to stop and spend. By way of example, this could occur in local cafes and galleries and on possible tour boats which may operate on some of the lakes as advised by Seqwater etc.
Rapid growth in youth travel	The youth market (under 25's) is growing significantly fast, often buoyed by school based excursions, school exchanges and younger people travelling with more confidence as they leave school or during their university holidays or work breaks. Somerset can capitalise on this youth market providing it can supply the active pursuits this segment is looking for. For the short – medium

TREND	IMPLICATION OF TREND FOR SOMERSET
	term this may need to focus on potential new activities on the lakes such as kayaking and fishing tours.
The youth traveller – more mobile, more wealthy	The youth market has often benefited from travel and holidays traditionally funded by parents. This has led to a generation (Gen Y and Gen Z) who do not wish to go without the experiences which their parents exposed them to. More disposal income is therefore applied by this sector of the market to travel. Somerset would need to create the product opportunities for this sector to produce sufficient brag value to attract it.
Nature as Australia's drawcard for tourists	The challenge for Somerset is that all of Australia is able to offer attractive nature based experiences, including urban and city environments. Though the lakes in Somerset are not natural (rather, they are man-made), they are perceived by many as nature-based assets because of the fishing, bird watching, kayaking and boating activities which take place. Somerset needs to market its close proximity to Brisbane and the Gold Coast (as major international gateways) to encourage a range of visitor markets to undertake day trip excursions for nature-based experiences. The challenge Somerset also faces is that it is not well known as a region, so a product-based marketing campaign to raise the profile of the region and attract visitors to experience events (such as a fishing carnival) and activities close to Brisbane would be required.
Increased urbanisation is likely to increase the desire for nature	The greater the urban density in SEQ, the greater the demand for day or short break excursions to Somerset to escape the city/urban landscape. As there is significant competition to capture these markets from neighbouring regions, Somerset has to look at a marketing campaign which both raises awareness of where and what the region is, and which links to products to experience.
An increasing desire for authentic experiences	The domestic and international market desire more genuine experiences that often may simply include fishing on lakes, good accommodation and a variety of café and restaurant facilities linked by effective transport services. For Somerset, this will equate to local food and beverage outlets (rather than major chain food outlets), unique and smaller scale market days, community events and more unique product. Everyone has rail trails, art trails, and various events so what are the unique elements which will make Somerset experiences stand out? Activities, such as photography tours for special interest groups looking at wildlife (hunting with a camera), are the types of unique experiences which need to be explored.
Visiting friends and relatives is forecast to rise	A small local population base will limit the potential of the VFR market for Somerset. However, Somerset could aim to build the VFR market by promoting itself as a region to hold family reunions (as Somerset is so close to Brisbane and the Gold Coast, this could be seen as a major attraction). Somerset would also need to have venues with the capability of meeting the demand for groups (often ranging from 10-80 people) so sufficient accommodation would need to be part of the product mix.
Internet usage continues to grow	The increasing use of the internet for researching and buying tourism products means that building an online presence - through social media channels and other online tools (particularly for bookings) - has become important for tourism businesses. Somerset operators need to update and maintain their

TREND	IMPLICATION OF TREND FOR SOMERSET
	websites on a regular basis. The product audit which was undertaken as desktop research as part of this DMP revealed the challenge associated with old websites which either have not been updated because the business is no longer operating (but based on their web presence, they appear to be operating) or the business owners are lacking the expertise required. As a result, visitors are given a false impression of what is and is not available within the Somerset region. A far stronger and consolidated web based presence is required to promote Somerset and to encourage more visitor enquiries for bookings.
Increased internet usage on smartphones	There is a growing expectation by visitors to be able access information, maps, brochures, booking facilities and self-guided tours via a smart phone app or smart phone accessible website. The potential exists to develop a mobile app or mobile accessible website for the Somerset region which also incorporates visitor interpretation material which helps provide visitors with an overview of the region and each of the towns specifically.
Information technology will continue to change how tourists access and use information	Many regions throughout the country are now well advanced in offering visitor information through a digital platform (websites, mobile apps etc). There is a steady move away from investment in traditional bricks and mortar style visitor information centres as the cost to councils and industry operators to supply brochures and offer services 7 days a week are prohibitively expensive. Market research also indicates that often, less than 18% of visitors to a region call in or use a VIC. Somerset needs to re-evaluate its current investment into the visitor information centres operated by Council.
More bookings are made online	Increasingly, visitors expect to be able to book all or most of their travel (accommodation, activities, transport etc.) online, often prior to travelling. As a result, it is important that Somerset operators have an active and up-to-date website with booking capabilities (where required). Web sites not well maintained will quickly turn off potential visitor interest.
The changing role of the travel agent	The travel agent role is gradually being replaced by direct online bookings for hotels, rental cars, flights and events. Somerset needs to investigate technology solutions which will help raise its profile in a cost effective manner and encourage industry to become stronger web-based marketers. Brisbane Marketing (Somerset's RTO) and TEQ is a champion of digital marketing and can offer support in this area via workshops to help industry.
Greater information flows between travellers	Smart phones, iPads etc. enable the sharing of information far more readily. Negative feedback on TripAdvisor, Yelp, Facebook and other travel-related websites can quickly impact on businesses and even destinations. Somerset needs to take advantage of increased and improved information flows to use visitors as a marketing tool to encourage others to visit by effective word of mouth advertising. This will also require ongoing improvements in service standards to better deliver to all visitor market segments.
Cruise ships on the rise	As Somerset is close to Brisbane and the Gold Coast, it has the potential to link into land based tours offered by the cruise ships. Offering day tour companies

TREND	IMPLICATION OF TREND FOR SOMERSET
	a cluster of Somerset experiences (food and beverage, general sightseeing, art and craft trails/stores and potential lake excursions) and packaging these up for promoting to the tour companies would be required. It is important to note however that there is intense competition for these cruise visitors as they are often very high spending visitors.
Overseas holidays are getting cheaper	With low cost carrier flights ex Brisbane and the Gold Coast there is increasing competition from Asian and Pacific Island destinations to lure the domestic market offshore, even for short breaks (3-4 days). What many of these destinations are doing is offering holidays which are completely packaged (flights, accommodation, transfers, food and activities). This is seen as highly appealing for the short break visitor market which is often time poor. Somerset operators need to remain value driven and look for value added components to offer in order to be competitive.
Queensland tourism companies face high (and increasing) costs	Compliance costs, government imposts and approval delays are making it increasingly difficult for tourism companies to remain profitable. Council needs to assist local operators and incoming tourism companies to help them remain competitive. For example, concerns over delays in getting council approvals need to be discussed and resolved.
Lack of investment in the domestic market holds back local potential	Too often, destinations focus on marketing and promotion rather than the improvement of existing product and the development of new product when attempting to grow visitation and visitor yield to a region. Challenges in attracting new tourism attractions and facilities and the lack of capital often available to help drive this need to be addressed. Council's leadership role in working with industry is vital in addressing these challenges. Whilst improving market awareness of Somerset is a highly important outcome, expanding the product mix and creating more development opportunities is equally as important.
The increasing cost of visiting Australia	The relative strength of the Australian dollar and the economic conditions in source markets make it even more important for operators in Somerset to be as value driven as possible. Consumers will continue to look for value adders being offered to make packages more attractive.
Staffing challenges	Increasing challenges in attracting and keeping semi-skilled and skilled staff and the impact of penalty rates during weekends and in the evening on business viability are major challenges for operators. Somerset needs cafes and retailers open, especially during weekend periods when events are on and visitors are looking to spend. Working with TAFE and other education providers to help provide tourism and hospitality trainees and apprentices needs to be considered by industry and via Council's Tourism Advisory Committee.

KEY FINDINGS

- Somerset benefits from being close to Brisbane and SEQ urban areas (Gold Coast, Sunshine Coast);
- Somerset is a sparsely populated area which in time will become an important marketing feature when it is linked to more tourism product;
- Tourism in Somerset has a heavy emphasis on outdoor recreation but there is currently limited product;
- An ageing population base will necessitate encouraging workers from a wider regional catchment to cater for tourism growth;
- Many operators are lifestylers and more commercial operators will be required; and
- The proximity to Brisbane and the Sunshine Coast in particular offer Somerset access to a number of growing interstate, intrastate and international niche markets which can be developed sustainably over time if Somerset is able to build up its tourism product base.

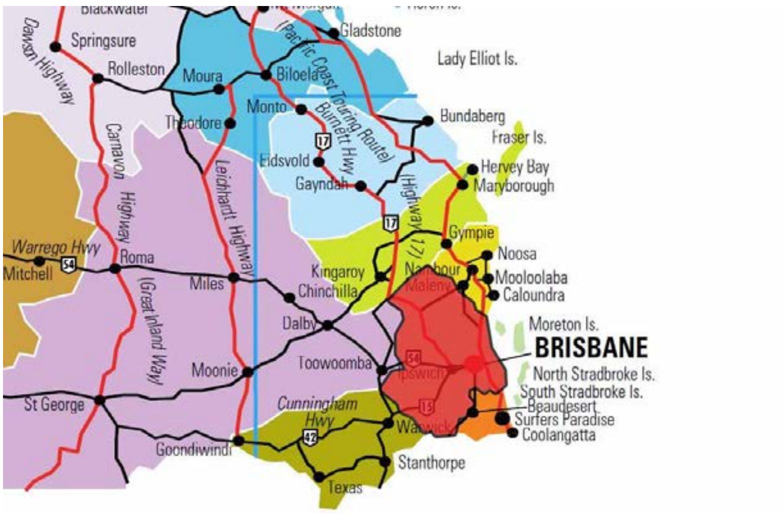
4. DEMAND AND SUPPLY ANALYSIS

4.1. VISITATION TO THE SOMERSET LGA

4.1.1. Overview

In terms of the regions defined by Tourism and Events Queensland, Somerset falls within the Brisbane region (see Figure 6 below). As a result, visitor data is collected for the entire Brisbane region and is not broken down according to sub-regions. Therefore, there is limited-to-no accurate data on visitation within the Somerset region specifically, and great care is needed in applying Brisbane Marketing regional data to the Somerset region.

FIGURE 6: BRISBANE TOURISM REGION (SHADED IN RED)



4.1.2. Methodology for estimating visitation to Somerset

As Somerset's RTO[15] does not provide a breakdown of visitation (or market segmentation) to the Somerset region, The Group has assessed visitation to the Somerset region as a percentage share of "Brisbane and Surrounds" visitation data, which we estimate captures the likely level of visitation to the Somerset region. This percentage share has been based on:

- Confidential visitor data gathered from individual tourism operators and based on accommodation occupancy levels within the region;

[15] Somerset's RTO (regional tourism organisation) is Brisbane Marketing

- Operator estimates of day visitation;
- Discussions with Tourism and Events Queensland on likely visitation levels;
- Broad regional-based data provided by Brisbane Marketing, including market segmentation;
- Assessment of visitation to surrounding regions (Toowoomba, Southern Downs and South Burnett, Lockyer Valley, Ipswich) as a check and balance based on our knowledge of these surrounding regions and our recent work with them; and
- The assessment of historical events, such as flooding, which we consider would have had an impact on visitation.

The following table illustrates the percentage share which has been applied to the Brisbane and Surrounds visitation figures[16] as part of this exercise.

FIGURE 7: SOMERSET PERCENTAGE SHARE OF BRISBANE AND SURROUNDS VISITATION[17]

Brisbane and Surrounds Visitation					
Year End Dec	**2008**	**2009**	**2010**	**2011**	**2012**
Domestic Overnight	4,706,000	4,176,000	4,860,000	4,926,000	4,989,000
International Overnight	897,000	913,000	948,000	883,000	957,000
Day trip	8,482,900	10,345,000	11,210,000	12,193,000	13,214,000
Total	**14,085,900**	**15,434,000**	**17,018,000**	**18,002,000**	**19,160,000**
Somerset % Share of Brisbane and Surrounds Visitation					
Year End Dec	**2008**	**2009**	**2010**	**2011**	**2012**
Domestic overnight	1.65%	1.65%	1.75%	1.05%	2.59%
International overnight	0.17%	0.18%	0.20%	0.18%	0.25%
Day Trip	1.45%	1.35%	1.40%	1.10%	1.90%
Estimated Somerset Visitation					
Year End Dec	**2008**	**2009**	**2010**	**2011**	**2012**
Domestic Overnight	77,649	68,904	85,050	51,723	129,085
International Overnight	1,525	1,643	1,896	1,589	2,393
Day Trip	123,002	139,658	156,940	134,123	251,066
Total Visitation	**202,176**	**210,205**	**243,886**	**187,435**	**382,544**

4.1.3. Historic Visitation to the Region

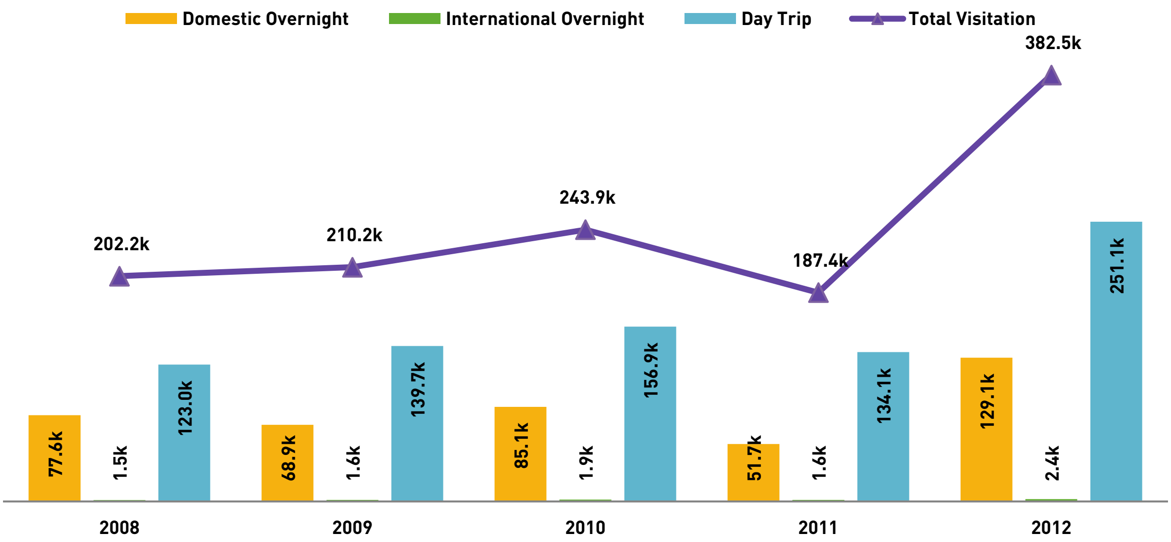
Based on applying the above estimated Somerset percentage share of total Brisbane and surrounds visitation over the period 2008 – 2012, the following figure illustrates estimated historic visitation to Somerset by visitor type. Key points to note include:

- Total estimated visitation to Somerset has increased by 89%, growing from 202k visitors in 2008 to 383k visitors in 2012;

[16] Collected by TEQ
[17] Based on estimates determined through consultation, through current broader visitor data and through The Group's experience in other similar regions.

- Day trip visitation experienced the most significant increase in visitation, increasing by 128k (or 104%) over the period assessed;
- This was followed by domestic overnight visitation, which grew from 78k to roughly 129k (a total increase of 66% or 52k visitors) over the period assessed; and
- International visitation also increased, growing from 1.5k visitors to roughly 2.4k visitors.

FIGURE 8: HISTORIC VISITATION TO SOMERSET



The lack of robust regional visitor data necessitates the application of a number of assumptions as determined through discussions with local industry operators, bus companies into the region, TEQ and Brisbane Marketing. Council needs to develop its own set of visitor statistics gathered through a simple visitor survey which each industry operator and retailer will need to assist with.

For the interim, and in the absence of robust empirical data able to be gathered at a regional level, the data sets created as part of this DMP should be applied.

4.1.4. Forecasted visitation to the region

Figure 9 on the following page provides a breakdown of estimated forecasted visitation to Somerset. The growth forecasts have been determined through discussions with industry operators (based on their own trend analysis for their own businesses), discussions with Brisbane Marketing and TEQ on likely regional trends and in discussions with inbound tour operators and industry associations such as the Caravan Parks Association of Queensland.

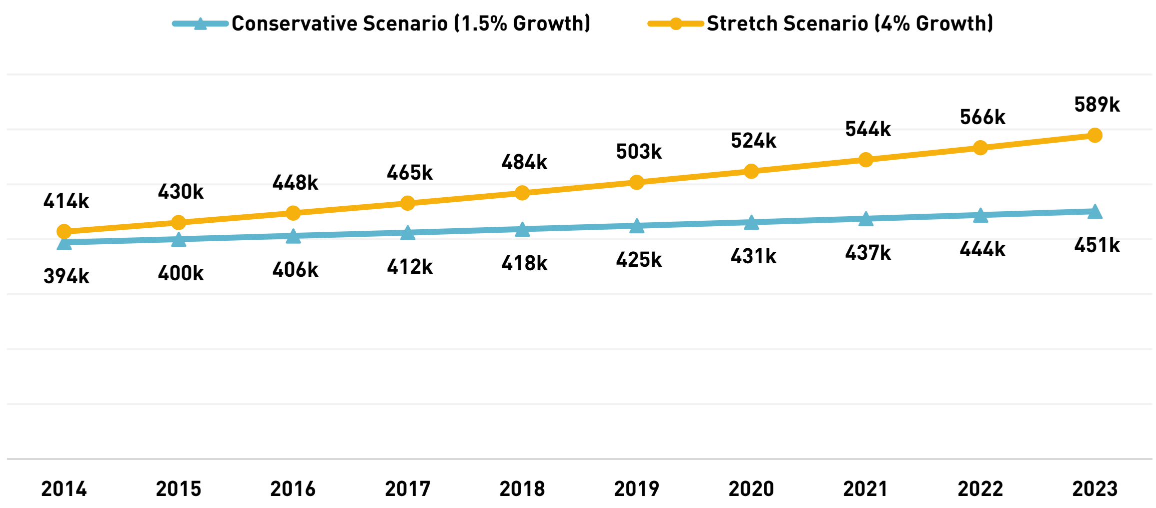
Visitor forecasts have been provided for a conservative growth scenario (1.5% growth per annum) and a stretch growth scenario (4% growth per annum).

The conservative scenario assumes there will be limited new product developed. As such, growth will be limited as it has been assumed that without new or extended product, growth will happen at current historic levels at best.

The stretch growth scenario assumes that a number of the initiatives identified in this DMP are activated and as a result, a sustainable and higher constant level of visitor growth could be achieved.

Under the conservative scenario, visitation could potentially grow by 57k visitors, increasing from 394k in 2014 to 451k by 2023. The stretch scenario yields a more significant result, with visitation potentially increasing by 175k visitors, growing from 414k in 2014 to 589k by 2023. The types of initiatives identified to help achieve the stretch growth scenario are noted within the opportunities section of this DMP.

FIGURE 9: FORECASTED VISITOR GROWTH



4.2. VISITOR MARKETS

As the travel motivations for interstate and international visitors can vary greatly, The Group has completed an estimated market share table (based on discussions with industry, Brisbane Marketing and TEQ as well as TEQ and Brisbane visitation data) highlighting the main purpose of travel to the region by visitor markets (interstate overnight and day visitors, intrastate overnight and day visitors and international overnight and day visitors) which provides a base level of data for Council and industry to build on.

Overall, the table illustrates the significance of the intrastate visitor market which is estimated to represent over three quarters of all visitors to the region. The data also reflects the opportunity to expand and grow the leisure overnight market.

TABLE 4: ESTIMATED MARKET SHARE BY MAIN PURPOSE OF VISITOR TO SOMERSET

2012 Estimated Market Share by Main Purpose of Visit							
	Leisure o/night	Business o/night	Conference o/night	VFR/ Education/ Other O/night	Day Trippers Drive Thru	Totals	Market Share
Interstate	18,500	200	120	1,150	31,978	51,948	14%
Intrastate	197,500	2,550	1,200	4,360	119,500	325,110	85%
International	2,950	105	80	250	2,100	5,485	1%
Totals	218,950	2,855	1,400	5,760	153,578	382,543	100%
Market Share	57%	0.7%	0.4%	2%	40%	100%	-

Much of the visitation noted in the above table reflects a consistent and repeat regional market, visiting Somerset once or twice a year for fishing and recreation activity on the Seqwater dams. Many of these visitors are noted as campers and caravaners who are utilising the various holiday parks within the region.

With the development of new caravanning/camping facilities and greater capacity, the opportunity exists to grow not only this traditional market but to actively grow new niche visitor markets, including the interstate short break holiday market and the wider regional caravanning and camping market from Northern NSW especially looking for holiday parks with a water theme.

4.3. SPECIAL INTEREST/NICHE TOURISM MARKETS

The table on the following page demonstrates Queensland's primary special interest visitor markets[18] and how product could be introduced and/or marketed in the Somerset region to appeal to these markets. These markets have been prioritised A (best fit for Somerset) through to C (limited fit for Somerset).

It is important to note that Somerset should not try to be all things to all visitors, but rather, should focus on visitor markets which allow Somerset to leverage off existing product and the region's natural assets.

[18] Obtained from Tourism and Events Queensland website, marketing material and consultation with Tourism and Events Queensland

TABLE 5: KEY VISITOR MARKETS TO FOCUS ON / MARKET OPPORTUNITIES

VISITOR MARKETS AND STRATEGIES TO FOCUS ON							
Market	**Visitor Segment**			**Market features**	**Product/marketing to appeal to these target markets**[19]	**Target Market Priority for Somerset**	**Reason for Prioritisation**
	Intra-state	**Inter-state**	**Inter-national**				
Day trip visitors ex Brisbane and Gold Coast	✓	✓	✓	▪ Day trip visitors ex Brisbane and Gold Coast whose main purpose of trip may not have been to visit Somerset but may have been encouraged to undertake a day trip after seeing promotional material/word of mouth etc.	▪ Day trip food trail experiences, including self-guided and guided experiences ▪ National park/forest reserve experiences (walking, mountain biking, horseback riding) ▪ Adventure experiences (sky diving, rafting, jet boating etc.)	**A Priority**	▪ Proximity of Somerset to Brisbane and Gold Coast ▪ It is the easy day leisure market coming for rest and relaxation, to use the lakes, to visit attractions such as the villages, to watch sky diving and to eventually come and do heritage aviation tours etc.
Ecotourism	✓	✓	✓	▪ Ecologically sustainable tourism with a focus on high quality experiences in natural areas that showcase unique environments and wildlife ▪ Nature based visitors are those who seek to experience natural places, which can range from passive to active experiences. ▪ Nature based experiences need to be linked to all other aspects of the visitor's total experience of a destination such as food, culture, relaxation, health, family needs, accommodation, transport etc.	▪ Nature based visitors often participate in: bushwalking/ rainforest walks, national parks visitation, whale/dolphin/other nature watching, farm visits, Beach trips, trekking, mountain biking, horseback riding ▪ Bird watching experiences, including packaging up of accommodation, transport and food with bird watching experiences	**A Priority**	▪ Within the ecotourism market in Somerset, bird watching could be a growth niche if lake birds provide a focus and bird hides are created ▪ The development of a Fresh Water Fish interpretative centre focused on the fish life within the lakes of Somerset should appeal to this market

[19] This column contains product which appeals to each associated target market; some of this product may not be available within the Somerset region but it has merely been stated to provide an overview of the target market's interest.

VISITOR MARKETS AND STRATEGIES TO FOCUS ON							
Market	Visitor Segment			Market features	Product/marketing to appeal to these target markets[19]	Target Market Priority for Somerset	Reason for Prioritisation
	Intra-state	Inter-state	Inter-national				
Day Sports-Based Tourism And Events	✓	-	-	▪ Main purpose of travel is to take part in an organised sporting activity, either as a spectator, participant or official. ▪ Preference is to stay in hotels, resorts, motels or motor inns, followed by staying with friends and relatives ▪ Day visitors coming from broader South East Queensland	▪ After an active experience including mountain biking, fishing, water sports, trekking as well as structured tours (hot air ballooning etc.) ▪ Park / forest reserve experiences (walking, mountain biking, horseback riding) ▪ Water sports packaged experiences – canoeing, boating, water skiing etc. ▪ Packaged structured tour experiences	**A Priority**	▪ Could grow quickly if a range of activities/events such as fishing competitions, triathlons, inter-regional cycling events, more parachuting events and aviation based events are developed and marketed
Backpacker Tourism	-	-	✓	▪ Generally spend more on activities, travel further and stay longer than other travellers ▪ Adventurous and independent travellers ▪ Undertake 'must see and do experiences' ▪ Preference for budget accommodation ▪ Eager to mix with travellers and locals ▪ Price conscious ▪ Flexible itinerary and extended stay ▪ Active adventure seekers ▪ Often undertaking a working holiday	▪ National park/forest reserve experiences (walking, mountain biking, horseback riding) ▪ Water sports packaged experiences – canoeing, boating, water skiing etc. ▪ Fishing experiences	**B Priority**	▪ Build on parachuting activity already at Toogoolawah and look to create kayaking around lakes etc. to offer easily accessible adventure experiences ▪ Affordable accommodation is a vital element so existing caravan and camping parks should be able to provide sites ▪ To attract backpackers to the region, good public transport should be available from Brisbane

VISITOR MARKETS AND STRATEGIES TO FOCUS ON							
Market	Visitor Segment			Market features	Product/marketing to appeal to these target markets[19]	Target Market Priority for Somerset	Reason for Prioritisation
	Intra-state	Inter-state	Inter-national				
Education Tourism And International Student Market	-	-	✓	▪ Visiting for the purpose of education ▪ Characterised by a long length of stay and a high average spend per visitor ▪ Most travel while studying in Australia. These trips are relatively short, either day trips or one – three day trips ▪ Sightseeing and visiting natural attractions is a very popular activity for international students ▪ Most travel in groups ▪ Hotels/motels are the preferred type of accommodation, followed by apartments. ▪ Greatest barriers to travel are concerns about money and study commitments	▪ Adventure and water sports packaged experiences – canoeing/kayaking, boating, water skiing etc. ▪ Fishing experiences ▪ Trekking experiences	**B Priority**	▪ Focus on day trips and overnight trips for school groups out of South East QLD in particular for school camping trips utilising the lakes for kayaking and trekking experiences
Short break market ex Brisbane, Melbourne and Sydney	✓	✓	-	▪ Family and couple market ▪ Strong potential markets ex Brisbane, Sydney and Melbourne	▪ Adventure and water sports packaged experiences – canoeing/kayaking, boating, water skiing etc. ▪ Packaged experiences, incorporating food trails, cooking schools, accommodation and other recreational experiences	**B Priority**	▪ Will grow interstate when food trails, lake kayaking trails (and kayak hire), heritage trails are established. ▪ The challenge is how to best promote to the market that there is an easily accessible inland region with appealing activity. This market is currently heavily conditioned to visit the Sunshine and Gold Coasts.

VISITOR MARKETS AND STRATEGIES TO FOCUS ON							
Market	**Visitor Segment**			**Market features**	**Product/marketing to appeal to these target markets**[19]	**Target Market Priority for Somerset**	**Reason for Prioritisation**
	Intra-state	**Inter-state**	**Inter-national**				
Indigenous Tourism	-	-	✓	▪ Primarily young visitors (15 – 24) and older retired visitors (55+) ▪ Professionally employed ▪ Travels for longer periods	▪ Indigenous site packaged tours ▪ Indigenous art/craft and cultural displays, visit Indigenous sites/communities and attend Indigenous performances	**C Priority**	▪ Limited product within the Somerset region to build on /leverage off

VISITOR MARKETS AND STRATEGIES TO FOCUS ON							
Market	**Visitor Segment**			**Market features**	**Product/marketing to appeal to these target markets**[19]	**Target Market Priority for Somerset**	**Reason for Prioritisation**
	Intra-state	**Inter-state**	**Inter-national**				
Food and Wine Tourism	✓	✓	-	▪ Couples with no kids, interested in short holidays, particularly weekend getaways ▪ Empty nesters who have more time on their hands, plan trips based on a region's offerings ▪ Most visitors to wineries in Queensland do so as part of a day trip, short break or weekend away rather than simply to purchase a bottle of wine. They visit a region to experience its character, food, lifestyle, and cultural attractions, to visit friends and relatives and to unwind and relax. ▪ Broad socio-economic market ▪ Primarily couple related, slightly more skewed towards women ▪ Strong interstate market, particularly out of Sydney and Melbourne	▪ Major draw cards for the food and wine visitor markets include wine tasting, vineyards, wine education, indulgence and romantic escapes, complemented by fine food produced with fresh, local ingredients and opportunities to wine and dine in natural settings ▪ Signature food events to promote the produce which is created in the region, particularly focusing on value-added produce ▪ Packaged experiences, incorporating the wine and food trails and accommodation	C Priority	▪ While Somerset does have a few small boutique food and wine experiences, the depth of product is not yet available to focus significant effort on promoting to this visitor market. ▪ The possibility exists to link to South Burnett and the Lockyer Valley and create cross-regional food and wine trails

VISITOR MARKETS AND STRATEGIES TO FOCUS ON							
Market	**Visitor Segment**			**Market features**	**Product/marketing to appeal to these target markets**[19]	**Target Market Priority for Somerset**	**Reason for Prioritisation**
	Intra-state	**Inter-state**	**Inter-national**				
Medical and Wellness Tourism	✓	✓	✓	▪ Generally travel for the purpose of promoting health and well-being through physical, spiritual or emotional activities or for treatment purposes ▪ Wellness tourism experiences broadly covers beauty spa visitation, lifestyle resort visitation and spiritual retreat visitation	▪ Yoga and spa retreats	**C Priority**	▪ Growth is dependent on creating a network of day spas and wellness centres as Somerset does not already have a network of these facilities ▪ Significant competition for capturing this visitor market exists in the Sunshine Coast and Gold Coast in particular
Conference tag on tours ex Brisbane	✓	✓	✓	▪ Male and female visitor market ▪ Generally skewed towards higher socio-economic market ▪ Tags on experiences pre-conference and post-conference, sometimes with spouse and family members.	▪ Packaged experiences, incorporating food trails, accommodation and other recreational experiences ▪ National park / forest reserve experiences (walking, mountain biking, horseback riding)	**C Priority**	▪ Limited ability to capture until dedicated food and wine tours, heritage tours, art trails etc. are established

VISITOR MARKETS AND STRATEGIES TO FOCUS ON							
Market	**Visitor Segment**			**Market features**	**Product/marketing to appeal to these target markets[19]**	**Target Market Priority for Somerset**	**Reason for Prioritisation**
	Intra-state	**Inter-state**	**Inter-national**				
Chinese visitor market	-	-	✓	▪ The fastest growing international visitor market to Queensland ▪ Includes group tours and free independent travellers including students studying in Brisbane ▪ Expectation for good retail trading hours ▪ Travel primarily via organised tours ▪ 4 key segments within the Asian market: ▪ Group travellers – less experienced, little to no English, travels in groups of up to 20 people, packaged travel, highly price sensitive ▪ Assisted Travellers – affluent, university educated couples, experienced travellers, seek to explore local culture, interest in golf, self-drive, food and wine and resorts ▪ Youth travellers – primarily education visitors, young demographic ▪ Business event travellers – visiting major cities for events, potential to attract packaged add-on tours	▪ Packaged experiences incorporating transport, accommodation and food. Including passive recreational and nature based experiences. ▪ National park / forest reserve experiences (walking, mountain biking, horseback riding) ▪ Promotion of the importance of tourism to the region, and the need to establish a retail-roster to extend retail operating hours ▪ ▪	C Priority	▪ Limited ability to capture this visitor market until a fishing market can be created to allow these visitors to go fishing in the dam/lakes and when signage, websites, promotions etc. is multi lingual and when tour operators see it as an appealing enough experience to add to their tour itineraries

4.4. CARAVAN AND CAMPING TRENDS

Caravanning and camping plays a key role in Somerset's tourism industry. In order to gather information on the level of supply and demand and trends specifically for caravanning and camping within the region, discussions were held with the Caravan Parks Association of Queensland and Tourism and Events Queensland.

Whilst robust statistical data is available on caravan and recreational vehicle numbers, details on camping visitors by comparison are far less reliable. This is primarily because caravans and recreational vehicles are required to be registered whilst camping tents do not. Furthermore, whilst traditionally many camping grounds kept details of the number of actual tent sites, over time these details have not been updated so base material is now no longer reliable in many instances.

Background information on the caravan market has been compiled and is available in Appendix 1.

4.5. IMPLICATIONS FOR SOMERSET OF HOLIDAY PARK TRENDS

Whilst the Somerset holiday parks are classified as inland parks, they do not necessarily reflect the traditional inland transit focused caravan/holiday park which many other regions have. This is because of the recreational lakes which Somerset has and therefore, many visitors come and use the caravan and camping sites as well as cabins for holiday rather than transiting purposes. Furthermore, feedback from a number of caravan/holiday park operators within the region indicate growing demand for more cabins and expanded recreational facilities to better meet the needs of a more discerning visitor market.

From the commercial information provided to us by caravan holiday park operators within the Somerset region, and from research into the market trends, there is clearly a level of demand for new and improved facilities to support ongoing growth in this important sector for the region. Importantly, it is not just the traditional users of campsites and caravan sites wanting changes, but a growing number of non-traditional caravan park users are looking to use cabins and chalets as well as higher quality tent camps for glamping.

Whilst the average annual occupancy rate for caravan park sites is approximately 39%, this is a reflection of the strong seasonality factor of the industry, with extremely high occupancy rates achieved during school holiday periods (and over the summer period generally) and significantly lower occupancy rates during winter periods. Feedback from caravan/holiday park operators in the Somerset region indicate higher average occupancy rates which are supported by the introduction of cabins which encourage greater visitation all year round.

To help improve overall occupancy rates in caravan and holiday parks, a number of regions have introduced a series of events focused on shoulder periods and low season where discounted rates can be offered for cabins, caravan and camping sites. The introduction of a small number of signature events which industry stakeholders and Council can collectively work together on, should be developed to support improved occupancy rates particularly in off season periods. Somerset is more likely to be able to leverage these opportunities than many other regions because it is so easily accessible from Brisbane and the Gold Coast especially.

4.6. QUEENSLAND DRIVE TOURISM STRATEGY

As Somerset is on an important inland highway and is strategically located linking to the Warrego Highway, the D'Aguilar Highway as well as the Brisbane Valley Highway, drive tourism is seen as a strategic tourism market to capture and grow.

The Queensland Drive Tourism Strategy provides useful findings for this DMP and specifically, for growing the drive tourism sector. The following key points are derived from the Queensland Drive Tourism Strategy prepared by the Department of Tourism, Major Events, Small Business and Commonwealth Games:

- Improvements to road infrastructure to address road quality, safety and maintenance are seen as critical to help support the drive tourism sector and creating a safety driving environment;
- Road signage is important for regional tourism destinations, reflecting the need for sufficient and accurate signage;
- There are issues concerning the effectiveness tourist signage and concerns over the slow process in applying for and getting sign off for signage through the Department of Transport and Main Roads (DTMR);
- It is seen as highly important that there is good quality road side infrastructure to allow people to pull over and stop safely;
- There is recognition of the link between improved road infrastructure and expanding accommodation facilities, particularly along drive routes;
- The internet and social media have enormous potential to support the drive market, noting that 83% of leisure travellers and 76% of business travellers plan their trips online; and

- Growth in the drive market can only be achieved through a coordinated and collaborative approach to marketing and promotion involving a wide range of stakeholders, including exploring new partnerships to achieve desired outcomes.

The strategic actions recommended for Council within this DMP link effectively into the desired outcomes noted for the Queensland Drive Tourism Strategy.

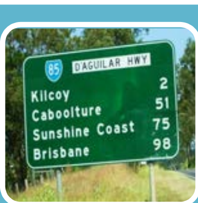
Specific ways Council can assist in delivering the outcomes for this Queensland Drive Tourism Strategy which may benefit growth in tourism to the Somerset region include the following:

The introduction of effective online and social media planning tools for travellers, including a mobile app which provides information on places of interest and places to stop for coffee and refreshments etc. within the region rather than traditional forms of main road signage which are often harder to gain approval for, more expensive to develop in the long run and which are not seen as effective as online visitor information solutions.

Ensuring that roadside rest areas are well maintained, well signposted and actively encourage the drive through visitor market to stop and spend in the Somerset region.

To ensure that roadside signage, which directs visitors to holiday parks and other key elements of tourism infrastructure and facilities, are clear and well maintained.

Ensuring that all roads within Council's control are well maintained with a particular emphasis on roads which may be used more heavily for cycling events throughout the region and to support other forms of event activity.



Ensuring that Council has representation on all relevant highway committees so that it is able to ensure that a Somerset regional perspective is always able to be provided and to be able to comment on initiatives which other surrounding councils may be putting forward to State Government.

4.7. PRODUCT AUDIT

A product audit which lists all available tourism and related product in the Somerset Region is contained in Appendix 2. It was beyond the brief for this DMP to undertake an audit of each site or property. Rather, the product audit lists the number of facilities by type and provides a breakdown on accommodation outlets, food and wine outlets and attractions, experiences and tours.

What was clear from this exercise was the unreliability of web based information with numerous examples of businesses which were no longer trading or who had changed their names. The listing was compiled based on a comprehensive desktop research exercise[20] and with the assistance of Somerset Regional Council.

KEY FINDINGS

- Total visitation from all sources to Somerset is estimated at 382.5k;
- Regional Tourism Organisation (Brisbane Marketing) data is limited because of the small sample size covering regional areas and with no specific data on Somerset, so Somerset needs to create its own visitor database for the future;
- Forecasted visitor growth could be more significant depending on the ability to introduce new products to encourage a broader visitor market than currently;
- The top priority visitor markets include day trip visitors ex Brisbane and SEQ, those specifically coming for ecotourism experiences, those coming for sport based tourism and events and those coming as day excursions, particularly on organised coach tours ex Brisbane;
- Strong growth is expected for holiday parks offering a variety of recreational facilities for which Somerset is well positioned based on its existing facilities;
- Opportunities exist to leverage off the Queensland Drive Tourism Strategy linking to highways through Somerset (the D'Aguilar Highway, and the Brisbane Valley Highway as well as linking to the Warrego Highway) including the introduction of online and social media planning tools for travellers, offering improved roadside rest areas and addressing directional and interpretive signage needs; and
- The Somerset region offers a range of attractions and experiences (as identified through the product audit), though issues exists including the variable quality and the need for more relevant product to better meet a wider visitor base.

[20] Importantly, the desktop research highlighted the need to keep websites updated with current information and content. The Group utilised primarily the internet in order to compile this product audit. Several of the listings The Group included were either did not exist anymore or contained outdated information. With Council's as well as industry's assistance, The Group was able to compile an up-to-date product audit. There is a need for an official website for the region which visitors can rely on when obtaining information about Somerset and which provides up to date information on attractions, cafes/restaurants, events etc. and importantly, current opening/closing hours.

5. CHALLENGES

There are a number of challenges going forward which need to be adequately addressed if Somerset is to be well positioned as a tourism destination in its own right for the future. While many of these challenges have been noted in the SWOT analysis, they are provided again here as a separate chapter to offer a synopsis of major strategic challenges which Council needs to help find solutions for.

5.1. NO CLEAR BRANDING OR POSITIONING FOR SOMERSET

Despite its close proximity of Greater Brisbane (within 1 hour), the Somerset Region is not well known as a visitor destination. Whilst the region has had brands previously created, such as the Valley of the Lakes and Somerset Country, there needs to be a brand developed which links the geographic location of Somerset with Brisbane in particular as a major visitor catchment area.

To achieve an effective brand will require unravelling the stories which makes Somerset interesting and unique. Importantly, the brand is not merely a name, tag line and logo. It is also important that Council can use the destination brand for broader promotional purposes other than tourism.

Whilst there may be some resistance by some stakeholders to pushing such a strong emphasis on the lakes within the region, they are noted by many people as the major recreational and visitor asset of the region and offer a unique point of difference which surrounding inland regions are not able to compete with.

5.2. STRENGTHENING THE WEB PRESENCE

Industry feedback, as well as The Group's own assessment, indicated that the region does not currently have a sufficiently attractive web presence. In addition, there is a need for a single dynamic website which can promote the region overall and which links to individual portals to promote specific product opportunities and potentially individual towns.

In the absence of major tourism operators, Council needs to take a leadership role and work, in partnership with industry, to drive the development of a high quality website with integrated booking capabilities (and which is smart phone accessible). An ongoing Council role may also need to be ensuring that the website is updated on a regular (for example, every two months) basis. The opportunity also exists to leverage off the new website recently developed by Brisbane Marketing and who have offered to assist industry operators in Somerset with improving their online capability through training workshops etc.

As a growing trend is the desire of consumers to plan and book holidays and excursions online, the creation of a high quality website will potentially strengthen the marketability of tourism product and assist Council in providing visitor services which match market expectations.

With many councils in a number of states and territories now re-evaluating their investment in visitor services (which has traditionally been delivered via visitor information centres), the opportunity to look at creating a digital online presence which can be well maintained and which industry can link closely with is particularly timely.

5.3. INDUSTRY COORDINATION

Operator and other stakeholder feedback has indicated that the region has suffered from a lack of coordination and a lack of a unified approach to delivering marketing outcomes and encouraging tourism development. Many operators commented that they still viewed the tourism industry as highly fragmented and without a strong unity of purpose. Concerns were also expressed regarding the level of communication between industry groups and Council and that a clear demarcation is required on areas where Council should take the lead role and where industry should take the lead to avoid overlap, duplication and disagreement.

It is important to note that these types of issues are not unique to Somerset and are often found in many regional areas. The solution generally is for Council to take a far more active and partnering role to assist industry to develop and market tourism on a more sustainable basis.

5.4. LEVEL OF RECREATIONAL FACILITIES AND FAMILY ORIENTATED ACTIVITIES

Industry feedback, as well as The Group's observations, indicate that a reasonably high percentage of the visitor markets to Somerset are retirees and semi-retirees and/or couples transiting through the region and utilising caravan and camping parks in particular.

Research has indicated that there is a changing market utilising caravan and camping parks and subsequently, there are changing expectations of facilities and park offerings. As a result, many parks have redeveloped themselves into destination parks with a variety of recreational facilities in order to entice the family market in particular (pools, water parks, cycling tracks, playgrounds etc).

Whilst we understand that it is generally far more difficult for inland parks to attract the family market (which tends to have a preference for coastal locations), Somerset differs because it has the benefit of having extensive lakes, which, though not coastal, are able to offer a highly competitive product compared to most other inland parks which cater far more to a transit market.

To encourage a stronger family market (the 30-50 year old age group in particular) to visit Somerset, additional recreational facilities are likely to be required, particularly within the caravan and camping parks within the Somerset region. This needs to also include the additional development of cabins and chalets which are now noted as a major component of caravan and camping parks and which appear to be high demand.

As well as the areas around the lakes, opportunities may also exist for introducing high quality tent camps (glamping) into reserve areas where attractive vistas and views are able to be offered. We understand that the caravan and camping part operators in Somerset have the desire to expand their product base and also note the need for Council to be supporting of this in order to actively encourage sustainable development, which, in turn, can lead to greater employment within the region and higher visitor spend patterns.

Those staying in cabins and chalets in particular often reflect a higher spending holiday park market interested in purchasing a variety of goods and services and where the opportunity is available, the chance to eat out in restaurants and cafes.

5.5. LACK OF QUALITY SIGNAGE AND MARKETING COLLATERAL

There is a need to expand and upgrade the quality of the directional and interpretive signage into and within the Somerset region. There is a need to develop a signage program for the region which includes an action plan for improving both directional (way finding) and interpretative signage throughout the Somerset region. This needs to include all signage (static and electronic) that could be placed in key locations to provide:

- A sense of arrival when visitors enter the Somerset region;
- Visitor information in the form of maps and directions to key attractions and regional hubs. Consideration should also be given to adding in driving times between towns and places of interest to encourage greater regional dispersal;

- With a range of important historical and natural sites of significance within the region, the opportunity exists to provide interpretive signage via storyboards and other mechanisms to create greater motivation to stop and experience the region;
- Signage could be tied in with a number of touring routes that could be developed for the region; and
- The introduction of destination sign boards close to the NSW border or, possibly within NSW (at Grafton for example), to encourage more travellers to take the inland route through Somerset as a relaxing alternative to the Bruce Highway, and thus bypass Brisbane.

5.6. COMMUNITY AWARENESS OF TOURISM

Within the Somerset region, there appears to be a lack of awareness regarding the value and importance of tourism. A strategy which promotes far more industry and community participation is required. This strategy could include a community awareness campaign which demonstrates the following:

- How the tourism dollar disperses through the local Somerset economy so far more businesses benefit;
- What kind of businesses benefit from tourism;
- How extended trading hours could provide benefits to a wide cross spectrum of the community and visitors;
- What the estimated value is of tourism via direct, indirect and induced spending impacts; and
- To help support why Council/rate payer funding is required to maximise the total returns to the Somerset as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

5.7. ACCOMMODATION MIX

5.7.1. Limited range of accommodation

There is limited accommodation available within the region whether it be for motels, hotels, caravan parks, eco chalets and high quality tent camps. Somerset is currently perceived by many as a drive through region, rather than a stop and stay destination, partly because of the perceived lack of accommodation options.

Feedback from a number of existing accommodation operators indicates their desire to expand the number of accommodation units (particularly for cabins and chalets in caravan parks) and also to look at the development of high quality tent camp opportunities.

The opportunity also exists, according to Seqwater, for feasibility studies into developing water edge cabins as well as introducing houseboats. This is a significant departure from the previous strict and limited approach which Seqwater had on accommodation in or around the lakes.

There is a need to work closely with Seqwater to identify potential locations where new forms of unique accommodation may be possible. This is important in order to determine the acceptable size and scale of the developments as well as agreeing to a process for assessing development applications.

5.7.2. Variable quality of accommodation

The region is noted as having a small number of high quality bed and breakfast establishments. Industry feedback, as well as that from other stakeholders, indicates that Somerset's accommodation offering generally is in need of refurbishment to better meet the needs of changing visitor markets and to attract new visitor markets.

5.8. RETAIL TRADING HOURS

Limited shop trading hours, particularly over the weekend and in the evening, is a concern primarily because it creates the perception that Somerset is not open for business.

To encourage retailers to extend their trading hours, it is important that they (as well as the general community) are provided with insight as to the economic benefits of doing so.

A strategy which vigorously promotes far more industry participation is therefore required. The strategy could include a community awareness campaign which demonstrates the following:

- How the tourism dollar disperses throughout the Somerset economy;
- What kind of businesses benefit directly and indirectly from tourism;
- How extended trading hours will provide benefits to a wide cross spectrum of the community;
- What the estimated value of tourism is via direct, indirect and induced spending; and
- To help support why council/rate payer funding is required to maximise the total returns to the Somerset region as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

It is important to recognise that greater community commitment to growing and promoting tourism will lead to greater word of mouth advertising for the region.

5.9. LIMITED BUILT ATTRACTION BASE

From the structured interviews we have undertaken, and from The Group's own analysis, there is a need for Somerset to grow its product mix in order to offer greater appeal not only to some of the traditional markets it currently receives but also to attract a wider visitor mix. A wider visitor mix will help grow and support the commercial viability of a number of businesses offering different goods and services (retail, food and beverage etc.) and will also help address current seasonality trends whereby there is significant peak periods of visitation during school holiday periods but mid-week visitation for many parts of the year is particularly low.

Identifying new product however, which is commercially viable and which can act as a drawcard for the region, is a challenge going forward. For many developers and investors in tourism, investment occurs only when sufficient market demand pressure necessitates this. Creating new facilities in order to build demand is perceived as a far more risky proposition.

Furthermore, whilst smaller product development opportunities are often easier to create because of their lower capital cost, and because they can sometimes be integrated into an existing experience, their ability to encourage greater interest from tourism intermediaries (bus tour operators, tour wholesalers, travel agents, inbound tour operators etc.) is significantly harder to achieve.

To develop product on a sustainable basis, consideration may need to be given to focusing on a small number of signature events to help build recognition of the region and to raise its profile.

Furthermore, as per the approach of other regions, Council may need to assess the potential for the reuse of existing unused buildings or sites which are noted as surplus to requirements. This could include old hospital sites and schools where attraction operators may be able to modify (on a cost effective basis) existing facilities to create a new type of visitor experience. An example of this was the retrofitting of a disused flour mill in Junee (NSW with a population of 5,500) into a liquorice and chocolate processing and retailing facility.

To attract this style of investment and development however, it is important for Council to create a list of potential sites (even if Council does not own the actual property) and list what sort of development is acceptable at these sites to assist potential developers and investors. Council therefore needs to identify those sites within the LGA which could potentially meet developer requirements and which could provide the basis for different forms of new product to stimulate greater levels of visitation and high visitor spend patterns.

5.10. QUALITY OF FOOD AND BEVERAGE

Feedback from a number of restaurant and café operators as well as general retailers highlighted challenges associated with:

- Finding suitable staff with the requisite skills;
- Generating sufficient sales to provide an attractive return on investment;
- The high seasonality of the visitor markets and limited weekday trade at times; and
- The price sensitivity of most of the current markets (including local demand).

A number of industry operators and broader stakeholders also commented on the variable quality of food and beverage reflecting on service standards, the range of food and limited shop trading hours.

5.11. POPULATION BASE FOR TOURISM

As previously indicated within the Context section of this Plan, there is a need to ensure that there is a sufficiently strong workforce able to be leveraged off for tourism based ventures. The ageing population base and the stronger growth in the over 60's age range segment for Somerset may create challenges in supporting a reliable workforce for new tourism ventures or expansion of existing ones.

KEY FINDINGS

- Many people do not know where Somerset is, so there is a need for a clear positioning statement and associated brand to raise awareness;
- Moving towards a web-based marketing presence and the use of a digital platform including a mobile app for directional and interpretative signage is required;
- Council needs to address industry coordination through its tourism advisory committee;
- Open space areas are not enough as an attractor for visitors and the creation of recreational and family orientated facilities (holiday parks etc.) are important product elements along with other new experiences;
- Raising community support and awareness of the visitor economy needs to be undertaken by Council;
- Improving the range of accommodation is required, including in non-traditional areas (glamping, overwater chalets, houseboats etc.);
- Extending retail trading hours needs to be actively encouraged, even if organised on a rotational basis to show that Somerset is open for business (particularly on weekends);
- Encouraging more built attractions which support the natural environment needs to be facilitated by Council with other stakeholders; and
- There is a need to extend the range of food and beverage facilities and to improve overall service standards to help grow the day visitor market especially and encourage more overnight visitors.

6. VISION FOR THE FUTURE

The following outlines the potential vision, mission and objectives to enable tourism to develop on a sustainable basis in Somerset. This deliberately builds on the existing tourism industry and expands on the areas which will offer sustainable social and economic benefits for the community for the future.

6.1. VISION AND MISSION

The suggested vision for tourism for the Somerset region is as follows:

> *"That the Somerset region will be recognised as a significant recreational playground for South East Queensland, building on its strengths of waterways, recreational and open spaces and heritage and cultural assets and leveraging of its close proximity to the major urban areas."*

Associated with this vision is the following Mission Statement:

> *"Somerset Regional Council, in partnership with its tourism and related stakeholders, will position and develop Somerset as a highly attractive destination, offering a number of passive and active recreational experiences, with the aim of generating significant economic, social and environmental benefits for the local community."*

The vision and mission need to be read together and reflect the need for a strong partnership approach by Council in tandem with industry going forward. Tourism is unlikely to reach its potential without active Council support and industry needs to be actively encouraging all operators to participate in forums, marketing opportunities etc.

In addition, Brisbane Marketing as the RTO needs to be strongly engaged with in order to create an effective marketing alliance and to create opportunities to leverage off the current rebranding and website enhancements being made.

6.2. OBJECTIVES

The following set of objectives relate to the vision and mission statements in the previous section. As this DMP is for Somerset Regional Council and local industry, the objectives relate to the needs of Council and industry in developing a sustainable tourism industry going forward.

The objectives for Council in order to develop a robust and sustainable tourism sector are as follows:

- For Council, through its tourism advisory committee, to coordinate the needs of the tourism sector to help drive marketing, development and human capacity needs;
- Ensuring Council's town planning processes, procedures and policies are able to proactively assist and encourage new forms of tourism development and investment;
- Developing a clear communication strategy from Council to all industry stakeholders within the region and externally;
- To ensure that the language within Council policies, procedures and development guidelines clearly reflects a message that Council is open for business and actively encouraging new investment into the tourism sector to enable it to grow on a sustainable basis;
- For Council to create a tourism investment and development memorandum to provide potential investors and developers with a list of possible investment opportunities which Council is more likely to support and which offers investors and developers greater certainty;
- Council to undertake a review of visitor services and, in particular, Council's investment into the two existing visitor information centres and the proposed third one to be created at Kilcoy, reflecting changing market desire for greater online visitor services support;
- In close partnership with industry, to develop a dynamic website which can link to individual tourism product through a series of product portals and which also allows individual towns in the region to have their own portal profile for marketing purposes;
- To develop an events strategy as a mechanism to help raise the region's profile and to offer a gradual way of growing visitation and improving visitor yield in Somerset;
- Development of a robust database which stores key visitation material, trends and visitor profiles via a quarterly survey which is provided to all accommodation, cafes and restaurants, art galleries and retailers generally, visitor attractions, activity operators and visitor information centres within the Somerset region. This quarterly survey should be summarised and trend assessed and communicated back to the industry players who participated;

- To form a special working partnership with Seqwater, who as the manager of the largest tourism assets in the region (and who is a significant land holder), needs to be partnered with to help drive visitor growth sustainably utilising the assets at their disposal;
- Developing an interpretive and directional signage strategy and utilising digital technology through online applications to actively encourage travellers to seek out experiences within the Somerset region; and
- To work closely with the operators and managers of the lakes and other recreational facilities to develop a brand proposition which clearly indicates the benefits and experiences of Somerset as a visitor destination.

KEY FINDINGS

- The link to South East Queensland because of its close proximity and as its recreational playground is essential;
- The waterways, recreational spaces and various heritage and cultural assets all combined offer the current look and feel for the region's positioning;
- Council needs to take a leadership role in helping to secure opportunities for developers and investors through identifying investment opportunities and communicating these in a prospectus to highlight the types of investment Council is keen to see; and
- Stronger relationships need to be formed with tourism industry groups and major players such as Seqwater to drive opportunities.

7. REGIONAL BRANDING

7.1. OVERVIEW

Discussion around a brand often centre on a logo and a tagline or slogan. A brand is far more than that, it is the very essence of a product or in this case a destination and needs to be reflected in the images and words used to describe the Somerset area.

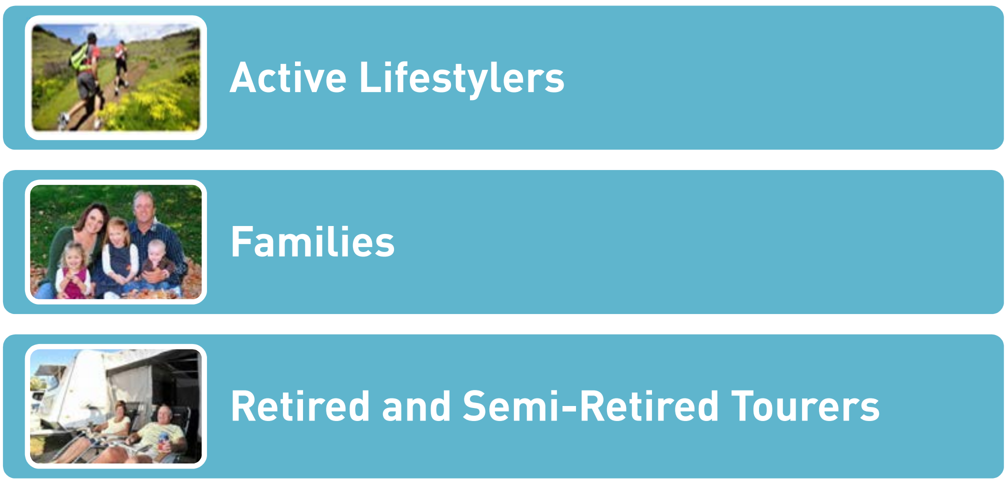
In defining a Somerset tourism brand we have been through a process to identify who we are talking to, what they do while in Somerset, how they feel and what they want to be seen as. The positioning has to be realistic, deliverable and one that potential customers can relate to. It has to be desirable and one that clearly differentiates Somerset from its competitors.

This process involved interviewing visitors to Somerset, potential visitors to Somerset and Somerset tourism operators. Tourism and Events Queensland and Brisbane Marketing were also interviewed as part of the process.

7.2. TARGET AUDIENCE

The following diagram illustrates Somerset's primary target audience as identified through industry feedback.

FIGURE 10: PRIMARY TARGET AUDIENCE[21]



[21] Families are often categorised in psychographic terms as "Connectors". For Connectors, holidays are about bonding with family and friends. This segment is most likely to holiday in their home state and drive to their destination.

In addition to the three primary target markets identified, consultation and research revealed several other special interest niche visitor markets which are attracted to the Somerset region. These markets primarily comprise those who visit the Somerset region for a particular activity (for example, four wheel driving or sky diving) or interest (heritage and history).

The opportunity exists to entice and capture larger numbers of these special interest visitor markets through the further development of associated product, direct marketing to these niche visitor markets as well as the packaging of product with accommodation and food options. These options are explored further in Section 8 of this DMP.

FIGURE 11: SPECIAL INTEREST MARKETS

7.3. TARGET MARKET ATTRIBUTES

- Independent
- Unstructured
- Laid back
- Flexible
- Explorers
- Value their personal space

7.4. TARGET MARKET ACTIVITIES

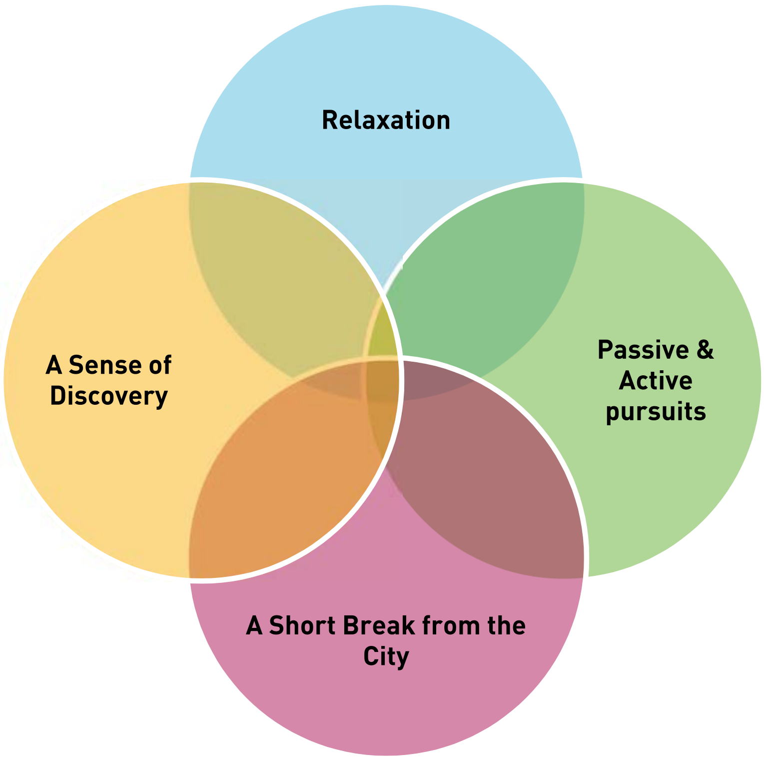
From the research undertaken by The Group, as well as the industry feedback received through workshops, one-on-one interviews, site visits and telephone interviews, the following provides a succinct overview of key activities undertaken by target market visitors to the Somerset region:

- Camping at Wivenhoe, Somerset and Atkinson Dams;
- Boating on Wivenhoe, Somerset and Atkinson Dams;
- Fishing on Wivenhoe, Somerset and Atkinson Dams;
- Sky diving at Ramblers;
- Four wheel driving at Landcruiser Park;
- Walking, cycling and horse riding on the Brisbane Valley Rail Trail;
- Picnicking and day trips;
- Visiting wineries and food attractions;
- Exploring the heritage;
- Fossicking through the markets; and
- Touring to experience nature.

7.5. WHAT VISITORS WANT TO FEEL

The following Venn diagram provides an overview of what visitors want to feel when travelling to Somerset.

FIGURE 12: WHAT VISITORS ARE LOOKING FOR

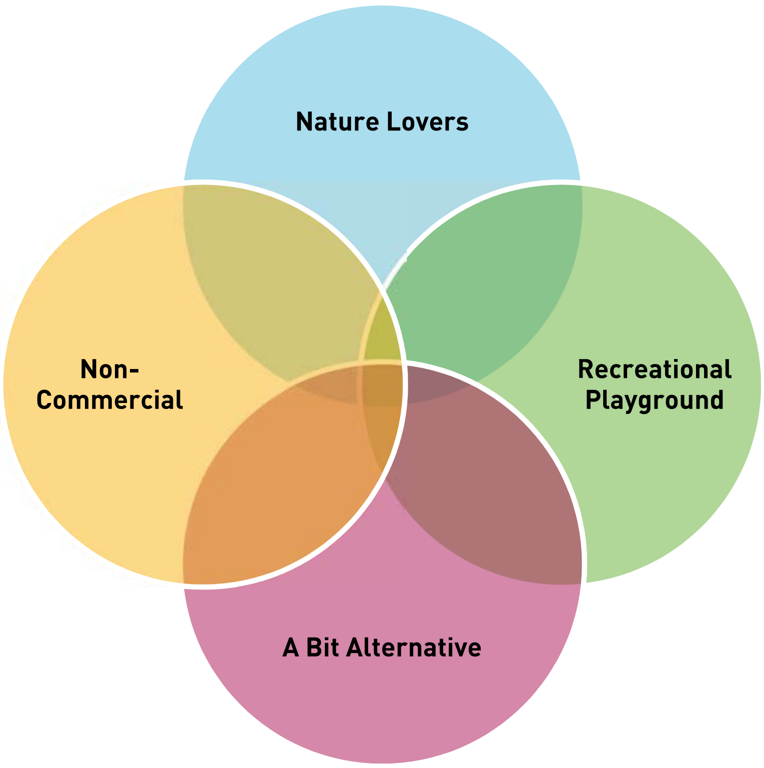


7.6. WHAT SOMERSET WANTS TO BE SEEN AS

From the industry feedback received the following figure indicates what Somerset stakeholders want their region to be perceived as. It is important to note that the language used reflects:

- A desire to retain the strong lifestyle focus which residence and operators claim is a major attribute;
- The local desire to protect environmental and social values;
- The desire to be a bit alternative and different; and
- A desire to avoid a strong commercial focus in favour of a better lifestyle balance.

FIGURE 13: HOW SOMERSET WANTS TO BE PERCEIVED



7.7. THE BRAND AND RATIONALE

Feedback received indicates that the majority of visitors to Somerset are independently minded, nature loving people who enjoy an unstructured short break from the greater Brisbane, Gold and Sunshine Coast areas. Somerset appeals to people who want to do something different and not follow the crowds, by way of example, travelling to the lakes or the mountains or the wide open spaces.

Across all respondents and interviewees, the word natural was the most used word to describe Somerset. Regardless of the fact that the lakes are man-made, and that there is only one natural park in the area, Somerset is seen as natural compared with the city and it's built up coastal neighbours.

It is very obvious that people visit Somerset for leisure purposes, so the area lends itself to being described as a natural playground. Both the concepts of nature and playground are emotive and deliver the experiential elements essential in a brand.

Based on the feedback received, research undertaken, as well as discussions with Brisbane Marketing and Tourism and Events Queensland, the most applicable brand is ***South East Queensland's Natural Playground.***

The brand needs to reflect this in the copy, stories and editorial and in the photos that are taken and used to promote Somerset.

The tagline often is a creative reflection of the brand but in this instance we would recommend to Council that they adopt the brand position as its tagline.

It addresses the issue of lack of knowledge on where Somerset is geographically, leverages the strong positioning of South East Queensland while powerfully describing the experiences that Somerset delivers. It also recognises the fact that council and Somerset tourism operators do not have a large budget to market this and that the brand message needs to be simple and unambiguous.

KEY FINDINGS

- Brand positioning needs to focus on attracting active and passive lifestylers, semi-retired and retired tourers, the broader family market and those coming for specific outdoor experiences (bird watching, fishing etc.);
- Visitors need to depart Somerset feeling relaxed and having achieved a sense of discovery, recognising that for most, it will be short break from the city;
- Somerset needs to position itself as an attractive destination for outdoor seekers and nature lovers, being a bit alternative and not as commercial as others; and
- The brand position needs to be built around Somerset's strength as a natural playground, even though a number of the major assets are manmade natural attractions.

8. DESTINATION DEVELOPMENT

This section highlights the types of tourism related development which is required to help grow overall visitation to the Somerset region. Whilst a new brand and promotional activity will help strengthen the position of Somerset as a destination, growth is still predicated on encouraging new forms of development to occur in order to help strengthen the product mix and improve destination marketability.

Council needs to consider assisting in the development of each of these opportunities as, without a strong leadership focus by Council, the ability to achieve the various development opportunities will be limited. It is also assumed that Council will liaise closely with industry and related stakeholders via its Tourism Advisory Committee, in order to prioritise development opportunities and their timing.

8.1. CLEAR FOCUS FOR EACH TOWN

Each of the towns within the Somerset LGA offer interesting points of difference for the visitor. It is important that the unique points of differences of each of these towns be branded and promoted to strengthen the position of each as a visitor destination. We are also mindful that for many visitors, Somerset is seen as an attractive drive through destination rather than a destination to stop, stay and spend.

The marketing of the towns within Somerset needs to be included, as much for tourism product development, as place making within a town planning and urban design context. The following opportunities/enhancements could be considered:

- Enhancement of heritage characteristics of the towns and buildings and their ongoing maintenance;
- Consideration of colour schemes for town centres;
- Introduction of gateway signs which can help differentiate Somerset from other parts of the wider region and to strengthen towns and village uniqueness;
- Reassessing signage into Somerset, particularly on main access roads and to create a point of difference; and

- Looking at aspects of street lighting, street furniture, and footpath and paving treatments etc. as simple but effective points of difference for heritage precincts and potential tourism precincts etc.

With respect to introducing a colour scheme for each town centre, Council may wish to consider the following:

- Many shopfronts in regional town centres have a number of vacant shop sites and, coupled with (at times) a lack of maintenance, they tend to detract from the overall town centre;
- Council may wish to consider creating a colour scheme for individual towns and working with major paint producers to develop appropriate colour schemes reflecting the age and style of buildings;
- Activities, such as a "paint your town" competition, which engender civic pride should be actively pursued;
- An inter-town (paint your town) competition could be created to inspire landlords to improve the townscape and by offering them potential paint schemes; and
- Potential also exists to partner with major paint producers to supply paint at a discounted rate to landlords who are prepared to paint and improve their buildings in the town centres.

Making town centres attractive and unique will also have appeal not only to the local community, but potentially as a visitor attraction as well. This could provide an opportunity to market individual towns as part of a touring route from the Sunshine Coast, Brisbane and the Gold Coast as a day excursion for visitors.

As well as the necessity for property owners to upgrade the exterior of buildings in each of the town centres, every effort should be made to enhance the overall streetscape of each town to build on its heritage or other features. Where particular heritage features still exist, these should be profiled in an appropriate manner so that locals and visitors can appreciate the significance of them. This may relate to places of interest, specific heritage buildings, seating and waterways etc. which are integral components of the history of each town.

Tourism development works particularly well where towns are seen to offer a degree of attractiveness and a clear point of difference. As noted above, this can be strengthened through the provision of:

- Finding ways of providing unique street lighting either from a heritage perspective or from an overall themed perspective; and

- The provision of street furniture including seating, benches, covered areas, flags and banners and the treatment of footpaths and paved areas through different types of materials used or styles.

8.2. PACKAGING OF PRODUCT

There are a few smaller scaled visitor experiences and café/restaurant experiences available throughout the Somerset LGA, however, currently there is generally very limited synergy between these attractions, experiences, accommodation operators, food and beverage providers and transport providers. In order to grow the Somerset tourism industry, connections between these attractions/facilities need to be developed and offered online to the consumer so that a composite visitor experience can be offered, whilst also helping support interest in longer visitor stay and regional dispersal.

Additionally, clustering experiences and attractions together with accommodation and dining options will help promote and showcase what Somerset has to offer, with packages created that can specifically cater for the region's targeted visitor markets.

Whilst some industry feedback indicates a struggle in achieving clustered product packages historically, this needs to be pushed and Council may need to take a lead role in achieving this. Packages could include activities such as fishing, kayaking, arts trails, wine experiences etc. and having these connected to competitive accommodation offers and also food and beverage experiences. This will strengthen the product offering for the region and boost its desirability as a visitor destination.

The opportunity also exists to look at cross-regional packaging, linking Somerset's experiences with the unique food experiences which exist say in the Lockyer Valley and/or the Southern Downs.

8.3. STATISTICAL DATA

For smaller regions, capturing accurate visitor information through ABS data and via larger regional tourism organisations (such as Brisbane Marketing) can be problematic. Generally, a smaller region's visitation data is merely an extrapolation from visitation to the wider region overall which can lead to fairly large margins of error.

For Somerset, there is significant value in ensuring that the visitor information centres (VICs) throughout the region are actually capturing useful visitor data. Whilst all visitors will not venture into a VIC, the data able to be captured by them provides an important component of the overall visitation picture for the region. We note that whilst the VICs have historically collected some visitation data, this has not been done on a regular enough basis to obtain realistic visitation trends.

Additionally, as previously noted within this DMP, there is a need for accurate visitor information to be gathered from a number of sources not just the visitor information centres. This needs to include visitor data gathered through accommodation providers, attraction and activity operators, retailers and food beverage operators etc.

However, whilst Council operates visitor information centres specifically, it is suggested that the following be undertaken:

- That a visitor count be undertaken at each VIC as a manual exercise by visitor information centre staff. Alternatively, a door counter could be installed at each of the VICs;
- Where volunteers are used to supplement fulltime personnel, they will need to be adequately trained in how to capture data;
- A simple visitor profile form should be developed which requires the following to be provided:
  - The postcode of the visitor;
  - Whether they are a day visitor or staying overnight;
  - Whether they are travelling as a couple, by themselves, as part of a group or as a family unit;
  - How long they anticipate spending in the Somerset region; and
  - A mobile number and email address (if willing) so further promotional material can be sent to them.

From a financial transparency perspective, it is also important that the expenditure and revenue associated with each VIC is able to be segmented out from Council's consolidated accounts. The Tourism Officer at Council should have the ability to review VIC costs and revenue streams on a quarterly basis which will allow operational trends etc. to be assessed.

Importantly, when events and festivals are held, the use of visitor information statistical data can help in capturing the value of the event for the region.

8.4. EXPAND ACCOMMODATION MIX

There is benefit in expanding the accommodation mix available within the region. This is needed to not only help grow some of the existing visitor markets but more importantly to expand into other niche markets as identified. The need for this has been recognised by industry and other stakeholders within the region who have commented on the need for additional accommodation in order to add to the current available room stock. The challenge however, is that generally the market will determine when it is viable to add additional room stock only when high levels of visitor demand and strong occupancy rates signal a need for this.

8.4.1. Forms of new accommodation for Somerset

The region already has a reasonable selection of quality B&Bs which serve an important niche in the visitor market. In addition, the traditional motel accommodation also fills and important niche. However, despite this, feedback indicated that the region struggles because it does not have a wide enough variety of accommodation choices.

Council and industry should look to consider broadening the accommodation mix by encouraging different forms of accommodation to the region. This could include:

- Expanded facilities within existing or future holiday parks22;
- The potential for overwater chalets on the lakes;
- Creation of farm stay bungalows;
- The potential development of a purpose built fishing lodge to service those fishing on the lakes and the surrounding rivers and as a potential base for a variety of fishing competitions;
- The refurbishment and retro fitting of older buildings where appropriate and close to major towns for unique forms of accommodation (this could include converting unused industrial buildings, older heritage buildings etc.); and
- The introduction of high quality glamping tent camps, possibly as a temporary opportunity on areas surrounding the lakes and when proven sustainable, to allow for these on a permanent basis.

FIGURE 14: BEST PRACTICE GLAMPING[23]

[22] Covers camping areas, glamping areas, powered and unpowered tend sites and cabins, as well as potential water park elements
[23] Paperbark Camp, Jervis Bay, Australia

There is a need to look at expanding existing caravan park sites to allow for more space for recreational vehicles. Additionally, as mentioned previously, feedback and research indicates that there is a need to expand the number of cabins and chalets on offer in the Somerset region (a change which many holiday parks have successfully adopted over the last 5 – 10 years).[24]

Whilst existing caravan parks do have a number of facilities, feedback provided to these operators by their visitor markets indicates the need for ongoing expansion and improvement to better cater for the needs of different niche markets and to particularly address peak season demand levels.

Information on a statewide basis and nationally indicates that whilst there has been a decline in the use of many inland transit parks, this has been at the expense of true holiday/destination parks. Holiday parks offer a far wider selection of facilities and amenities and can cater for RV vehicles, improved caravan and camping sites, a wider selection of cabins and chalets and in some instances high quality tent camp facilities to allow for glamping.

As the holiday park market is a significant sector of the accommodation mix within Somerset and reflects a market with strong growth potential if facilities are put in place to grow on a sustainable basis, expansion of existing parks should be encouraged and supported by Council. It is also important that these holiday parks are not viewed as traditional transit parks as previously explained.

8.4.2. Water Edge Chalets

Discussions with Seqwater highlight a change in approach to now consider water edge chalets. The value of looking at this type of accommodation is to identify something unique for Somerset region and which maximises the opportunity for lakeside development. Such development already occurs at Lake Crackenback in the Snowy Mountains region of NSW which may have application for the Somerset region.

Such a move would also see a strategic change of direction by Seqwater to more actively support forms of tourism and recreation only where this can be achieved without risking degradation to the quality of the water supply through the various dam lakes.

A feasibility assessment would be needed to test the merits of over water chalets.

Because the dam levels do rise and fall a pontoon style form of development may need to be considered recognising that the region has gone through periods of drought where lake levels

[24] Information on the demand for holiday park expansion has been gathered from the actual operators. In addition, information has been obtained from Queensland Caravan and Camping Association on caravanning trends and the types of new product and facilities which the markets are looking for.

have significantly reduced and more recent times where exceptionally high lake levels have occurred. Retaining flexibility through pontoon or some other form of flexible building platform may need to be evaluated.

Over water chalet development is seen to be particularly attractive for a number niche markets and most importantly could offer Somerset a unique form of accommodation not otherwise seen in Queensland.

FIGURE 15: LAKE CRACKENBACK

Because the dam levels do rise and fall, a pontoon style development may need to be considered, noting that the region has gone through periods of drought where lake levels significantly declined and, in more recent times, exceptionally high lake levels have occurred. Retaining flexibility (through pontoons or similar forms of flexible structures to build on) needs to be evaluated.

Overwater chalet developments are seen to be particularly attractive to a number of markets and may offer Somerset Region a unique form of accommodation not otherwise seen in Queensland. Creating product which is unique and marketable are important considerations for the region to capitalise on.

8.4.3. Encouraging new accommodation development

What Council needs to consider therefore is possible ways of encouraging desirable new forms of commercial accommodation and to identify areas where it is able to help facilitate this.

Council could potentially look at determining possible sites, linking in with predefined tourism precincts and areas within the region, where Council will actively support further commercial accommodation being developed.

In tandem with this, Council may need to review the language within its planning instruments in order to ensure that there is a clear message to developers and investors regarding the types of tourism development which Council may actively wish to encourage and, possibly, the general areas or types of areas where it would look more favourably at. This need not indicate that Council would necessarily support any development application but rather, provide a clear message on areas that Council would be more likely to support in principal.

It is noted that Somerset Regional Council have processes in place to streamline the development application process and assist with development application requirements. Whilst a number of stakeholders within the region perceive that the delay in achieving planning approvals is the responsibility of Council, in reality the processes are mostly determined by State Government legislation, for which Council has to work within the boundaries of. Regardless, there is a need for a clear communication message to the tourism industry and, more broadly investors and developers, on areas where Council is keen to see new development occurring.

Therefore, to encourage different forms of commercial accommodation it is particularly important that the tourism industry, the community in general and Council have a positive collective message to encourage commercial development to occur. Council planning instruments and supporting strategic documentation need to actively encourage different forms of commercial accommodation so that investors and developers understand that Council is supportive. This does not diminish the level of rigour which Council will require however in assessing commercial development projects but reflects that Council is "open for business".

8.5. MAJOR WALKS

Whilst there are some national parks within the Somerset region, there are no well-known walking trails to support growing nature based and trekking-based tourism to Somerset. The potential does exist however, to build on the natural beauty of the region and the national parks and lakes within Somerset to create a number of walks to places of interest.

In discussions with Seqwater, there is interest in creating a series of walking trails around the various lakes and on property which they control. This also provides an opportunity to develop a range of mountain biking trails (although care is needed to avoid conflict between walkers and mountain bikers).

A separate study on the location and positioning of walking trails would be beneficial for the Somerset region. This could also take into consideration the rail trail which is an exciting initiative and which has been worked on for some time and needs to be completed.

8.5.1. Possible Formats of the Treks

Importantly, walking trails ideally need to link various towns or places of interest. Consideration should be given to developing trails which can traverse forest reserve areas, national parks and public land - whether held by Seqwater or other agencies - and which allows visitors to commence a walk from one town area and to arrive in either a place of interest or another town as an end point.

From research undertaken on a variety of walking trails in various locations nationally and internationally, walking trails should vary so they offer:

- One hour trails – possibly in a circuit format;
- Half day trails – possibly in a circuit format;
- Overnight trails; and
- 2 - 3 day trail options.

Creating a series of walking trails in the Somerset region will also provide opportunities for tourism operators to provide transport, to assist with providing supplies and meals potentially and also, where appropriate, for tour guiding and to drop off and pick up walkers and mountain bikers.

8.5.2. Bird Watching and Flora/Fauna Viewing Treks

There is also potential to link the walking trails with bird watching activity (we note that the Somerset region has a particularly strong interest from birdwatchers) as well as the unique flora and fauna which may be able to be viewed. As this is a specialised area and is very high yield, providing a high quality guiding service for birdwatchers including the creation of hides where people can expect to view birds needs to be considered.

8.5.3. Overnight treks

An overnight trek could be modelled off the high yielding overnight treks in Milford Sound in New Zealand's South Island. The most famous trek, the Milford Track, extends 53kms from Te Anau to Milford Sound. The trek caters for over 14,000 hikers each year, predominantly during the walking season (October through April), and takes the average visitors 4 days to complete.

The trek provides hikers with two options; hikers can independently complete the trail and stay in huts provided by New Zealand's Department of Conservation or, undertake the hike with a guided group and stay in private huts (Figure 16 on the following page provides an illustration of huts located along the trail). Visitors who choose to undertake the trek as part of a private tour pay for the privilege, with the average operator charging over $2,500 per hiker during the high season.

FIGURE 16: THE MILFORD TRACK AND CABIN ACCOMMODATION

The development of guided overnight treks, which could be run by experienced trekking operators, could present a valuable opportunity for Somerset to stimulate interest and increased visitation, particularly from the international visitor market. It could also help position Somerset as a hub for adventure activity, combined with activities that can be undertaken on the lakes as well as mountain biking/4WDing experiences.

A feasibility study would need to be completed to determine the viability of developing these overnight walks and importantly, operator interest in running these and developing accommodation. More specifically, the following would need to be considered:

- Potential existing trails/tracks which could be utilised, this includes assessing existing fire trails and traverses which would need to be undertaken. Consideration would then need to be given to how much new track needs to be developed and provide appropriate costing for undertaking construction;
- Private land which may need to be utilised for small portions of the track and permission for this;
- Assessment of existing campsites which could be utilised or determine costs for construction of basic tent camp sites. This would need to consider security and how vandalism could be minimised;
- Assessment of Plans of Management for any reserves or national parks passed through and whether these would require amendments; and
- Private operator interest in running walking tours.

8.6. KOALA/DEER PRECINCT

The project team understands there is a high concentration of koalas who reside in a designated koala precinct east of the Wivenhoe Dam. Whilst there is often a challenge associated with the lack of numbers of koalas in a given area (they tend to spread out and are fairly territorial), there are definitely visitor markets keen to see koalas in the wild, particularly where the likelihood of seeing them is high.

Consideration should be given to the development of a dedicated koala (or possible deer) sanctuary, with the potential for a small interpretive centre if the precinct already designated or other areas are seen to be significant. Discussions would need to be held with Queensland Parks and Wildlife Service, as well as other state and federal wildlife agencies, to determine how significant the koala precinct east of the Wivenhoe Dam is and whether it merits the development of supporting infrastructure.

8.7. WILDLIFE PHOTO SHOOT TREKKING

The project team has been advised that in a number of forest areas around the Somerset region, there are opportunities for deer and pig hunting. Whilst it is thought to be problematic to organise deer hunting tours for a number of safety reasons, there is a growing market keen to capture top quality wildlife photographic shots of these animals with a camera instead.

The concept involves stalking deer, but rather than ending the stalk with a shot, it is the camera shot which is seen as the end result; this should be seen as a form of wildlife viewing.

In addition, if it is possible to organise deer hunting tours, and these can be safely organised in designated areas to allow this to occur, then this could also be promoted as part of the suite of visitor experiences available within the Somerset region.

8.8. AERONAUTICAL EXPERIENCES

We note that the Somerset region has an array of aeronautical experiences on offer, including:

- **Ramblers Skydiving**: One of the oldest tourism operations within the Somerset region is Ramblers Skydiving facilities at Toogoolawah which includes a private airstrip and a drop zone (other facilities onsite include accommodation and training facilities). We note the drop zone has been used for a number of major championships over the years;
- **Watts Bridge**: An ex-World War II bomber base which still has chalets, World War I and World War II aircraft and replicas, ultra lights, gliders, and also has an approval for an aviation museum. We note that the aviation museum has not yet been developed as the cost

of creating it is high and we understand that there are leasing and financial issues in achieving this outcome;

- **Archer Falls Airfield**: This is a private airfield located midway between Woodford and Kilcoy. The airfield offers friendly flyer visitors with an opportunity to escape their local flying circuit and experience a flight over Somerset's bush environment. The airfield offers a campsite with barbecue and tank water facilities. We note the airfield is open to visitors for fundraising events, such as the FLY IN DRIVE IN event and an annual AIR EXPERIENCE weekend event.
-
- Because of the broad range of aeronautical history available within the Somerset region, the opportunity exists to create a heritage aviation trail encouraging visitors to visit each of the sites. The potential exists to create an online trail experience either through a mobile app or other form of digital technology which allows visitors to capture specific data and stories at each of these sites of historic significance.

Although the development of an aviation museum could be beneficial for the region, we note that the challenge with creating this is often the need to find a major benefactor to support its development. By way of example, the Temora Aviation Museum[25] in the Riverina region of NSW has been developed because of one individual's passion with historic planes. The precinct features a fully restored ex WW2 air force training base and an aviation museum with a variety of historic fully serviced aircraft which can be flown.

As an initial step for Somerset, consideration should be given to creating an aeronautical heritage trail to start to inform the visitor markets of the facilities and significance which the Somerset region has had over the years. If significant interest can be generated, a feasibility study could be undertaken for the development of an aeronautical museum/precinct. This should include determining estimated visitor numbers, the possible financial implications of the development, as well as investigating potential grants which may be able to be applied for in order to fund part of the development.

8.9. HOUSEBOATS

In order to leverage off the region's lakes and to help alleviate the demand on accommodation stock during peak periods, the opportunity exists to investigate the introduction of houseboat accommodation.

We note that historically, there has been some concern over the introduction of houseboats on Seqwater controlled lakes within the region, stemming from the fear of waste contaminating the

[25] http://www.aviationmuseum.com.au/

waterways. However, with higher standards of waste containment, management and much higher environmental standards now applied to houseboats, the opportunity to introduce houseboats as an attractive form of casual water based accommodation should be reassessed.

Whilst it may not be possible to introduce houseboats on all lakes, it is suggested that a pilot project be undertaken to introduce a small number of houseboats on one of the lakes and to assess their impact over a 12 month period. This in turn may lead to creating a set of guidelines and restrictions to ensure that concerns over waste management etc. are able to be mitigated.

8.10. LAKE TOURS

A variety of coach groups visit Somerset on a regular basis, including elderly groups often from Probus and other clubs, and from the greater South East Queensland catchment area. As the current experience for visitors is generally a fairly passive experience on a coach, which generally includes stopping by the side of one of the lakes, the potential exists to introduce a boat operated and more interactive lake tour.

The opportunity should be investigated for introducing a possible twin hull vessel with a capacity to take up to 80-120 people for tours around Somerset and/or Wivenhoe Dams which could support:

- Encouraging greater length of stay within the region and therefore higher spend patterns;
- Economic benefits associated with maintaining the vessel and stocking it so other businesses are likely to benefit within the region;
- To help educate more people about the significance of the lakes and to generate better understanding of water catchment areas generally;
- To tell the story of the Lung Fish and its link to the dinosaurs and why this a particularly interesting aspect of these lakes; and
- To allow and encourage visitors to stay longer and potentially stay overnight in accommodation within the region so that the total level of visitor expenditure could increase.

8.11. FISHING AND BOAT HIRE

Currently, we note there is limited availability to hire fishing gear or boats to go out onto the lakes. The opportunity needs to be assessed for allowing for boat hireage and fishing tackle hireage, not only for major fishing based events but also for passive recreational experiences.

Discussions should be held with Council, Seqwater (as the custodian and manager of the lakes) and SRTA to assess the potential for encouraging boat hire companies to establish.

8.12. WATER SKIING

The Somerset Dam and Atkinson Dam[26] are already recognised as important water skiing venues. As well as the recreational value, consideration should be given to encouraging competitions and events so that Somerset builds greater significance as a sporting hub.

Once again, discussions need to be held with Seqwater to discuss access to the lakes and how competitions can be held without restricting access to other lake users etc.

The region should also consider creating novel and slightly different events which utilise the natural assets within the region to a far greater extent. For example, rather than merely organising a biathlon or triathlon with running, cycling and swimming, consideration should be given to biathlons or triathlons which have a water skiing component, possibly a fishing component as well as a lake kayaking component.

As these types of events have appeal to a corporate-business or broader public market, rather than the extreme sports market, they are likely to have wider appeal. Encouraging the corporate market to actively participate in events is an important consideration as many who are likely to get involved may eventually become sponsors of elements of events or eventually take naming rights.

8.13. MOUNTAIN BIKING

As noted previously, the Somerset region is located relatively close to Brisbane as well as the Sunshine Coast and Gold Coast, and offers an array of high quality outdoor areas (lakes, mountains, valleys etc.). The potential should exist therefore, to create a series of high quality mountain biking trails to attract what is considered to be a quickly growing niche market.

The project team understand that a purpose built international quality mountain biking circuit has been created already on private land near Kilcoy. This has been developed by a private individual who has engaged some internationally experienced mountain biking trail designers from New Zealand to create a purpose built circuit. As understood, this is not open to the general public but rather is by invitation only.

Whilst this could potentially be a great initiative to leverage off, there is a need to create trails available to the public for the purpose of actively encouraging not only day visitor markets but overnight mountain bikers to come and experience the Somerset region.

Associated with this should be the creation of mountain biking events. Council and its tourism advisory committee would need to liaise with relevant mountain biking associations and State

[26] We note Atkinson Dam is located within the Lockyer Valley

Government sporting agencies to determine the opportunities for creating mountain biking events for the future.

Importantly, it may be possible to focus a variety of niche product around specific sub-regional parts of the Somerset region. For example, it may be possible to create a mountain biking focus for the general area around Kilcoy even though mountain biking activities and trails may also be equally applicable in other parts of the region.

8.14. CANOE TRAILS

In discussions with Seqwater, it would appear that canoe trails are an activity which are generally supported. The opportunity for developing canoe trails including the hireage of canoes, creation of areas for storage and trail stopping points etc. need to be considered.

Whilst a number of visitors may wish to undertake canoe trails by themselves, the opportunity exists, to create a canoe hire facility and which may enable areas to be designated specifically for canoe trail purposes.

In addition, the potential exists to develop a series of tour products which could include a mixture of walking trails, biking trails and canoe trails as part of a lake focused experience within the region. SRTA, in partnership with Seqwater and Council, need to consider these opportunities and how best to promote them.

8.15. THE RAIL TRAIL

The project team understand that a rail trail has been worked on for some time and the outstanding issue relates to the final completion of part of the trail and determination of who will fund the ongoing maintenance.

As understood, there are unresolved issues with land ownership and most importantly overall responsibility for the trail's maintenance. We note that State Government have indicated limited interest and consequently, responsibility for its maintenance and promotion most likely will need to rest with Council and local land owners/tour operators.

Currently, those using the existing elements of the rail trail are mostly mountain bikers and horse riders (particularly over weekend periods). It is understood, that some bridges are not yet available in the southern sections of the trail although the bulk of the trail has been completed.

Council may need to consider taking a leadership role in helping to drive the completion of the rail trail and to use this as a starting point to encourage the development of other trail experiences.

8.16. WEBSITE FOR THE REGION

As more and more visitors plan and book tours and experiences online, the importance of a dynamic website as well as other forms of digital technology is particularly important. The current tourist website developed by SRTA needs to be redesigned and its functionality improved.

We understand that Brisbane Marketing is developing a highly interactive and dynamic website not only for Brisbane, but also for all sub-areas or regions under their control. The opportunity therefore exists to effectively piggyback on the development activity for the website created by Brisbane Marketing and modify this where possible to be Somerset region specific.

In discussions with Brisbane Marketing, there would appear to be a level of support for the Somerset region to utilise the website to help promote the region and its various products and experiences.

It is important that Council's tourism advisory committee and major industry operators meet with Brisbane Marketing to discuss how best to leverage off the website which has been developed and which will be fully operational early in 2014. This may provide the most cost effective opportunity for Council and local industry in order to have a high quality website created.

8.17. FRESH WATER INTERPRETIVE CENTRE

We note that Seqwater already have an information centre at Lake Wivenhoe which houses educational audio-visual displays, manages camping enquiries and sells boating permits for both Lake Wivenhoe and Lake Somerset.

FIGURE 17: WIVENHOE INFORMATION CENTRE

The opportunity exists to create an interpretive centre specifically focused on the Lung Fish and providing an opportunity to see them in tanks. This also provides a chance for a high quality educational experience with possible audio visual to tell the story of this 200 million year old fish. As the existing Seqwater facility has a number of facilities associated with it, the opportunity to leverage of this may provide a more cost effective way of developing a Fresh Water Interpretive Centre.

Importantly, approaches need to be made to relevant state government agencies to ensure that education programs are developed to encourage school groups to come out to the Somerset region to learn about Lung Fish as well as for broader experiences associated with activities in the lakes. This may include a variety of programs to inform students about the importance of water catchment areas as well as encouraging them to undertake activities such as canoeing etc. as part of their experience.

8.18. PARTNERING WITH NEIGHBOURING REGIONS

When trying to develop and grow tourism within an LGA, it is crucial to recognise that visitor markets do not recognise local government boundaries. As such, opportunities need to be explored with surrounding regions to encourage stronger visitor flows and to yield associated economic and social benefits.

For the Somerset region, examples of this could include the following:

- We note that the Lockyer Valley are increasing their focus on promotion of food technology and innovation within the LGA. The opportunity exists to work with the Lockyer in packaging their food technology and innovation experiences with wineries and activity based experiences available in Somerset; and
- Expanding existing wine trail experiences in the South Burnett region into the Somerset region and encouraging drive circuits and loops rather than the current scenario where many people travel to South Burnett only for a wine experience.

Discussion with the Lockyer Valley Regional Council indicate a desire to find product opportunities to collectively develop on a regional basis, with the requirement that these provide benefits for communities across both LGAs.

It is also important to note that each LGA has the potential to act as a gateway into the neighbouring area and opportunities to cross sell and promote product as well as experiences needs to be considered.

8.19. NEW FESTIVALS

Discussions with a range of stakeholders indicate potential for the development of variety of festivals and events, including a possible music festival, food festival and a folk festival. It is important to note the following:

- Many regions have already been developing a variety of sport based, cultural based and food and wine based festivals and events over many years and therefore, obtaining market share can be difficult in what is considered a competitive and fairly event cluttered environment;
- It is better to focus on undertaking and developing a couple of signature events and festivals to a high standard and ensuring that these are carefully managed and controlled rather than trying to take on too much;
- Successful events focus on the uniqueness of an area and what it is able to highlight; and
- Considering the fishing activity which is well known in the Somerset region (particularly for Bass), the potential may exist for a fishing event and festival to be developed.

Whilst fishing competitions provide a good starting point, the opportunity exists to expand these to include:

- A fishing culinary experience where local cafes and chefs from the broader Brisbane region can promote fresh fish;
- Possibly working in with the Lockyer region to combine fresh food produce with fish;
- Encouraging cooking demonstrations and cooking schools to focus on the fresh fish and local produce; and
- Encouraging other culinary elements to be introduced (condiments and other items grown in the Somerset region).

8.20. PROJECT VIABILITY

It is important to note that to encourage a broader visitor mix and particularly, to focus on a high level of visitor expenditure, new forms of tourism development are going to be needed.

Like all development concepts however, they will require a feasibility study to test their viability. Whilst a number of these potential development projects (house boats on the lakes, lake tours, water edge development etc.) would seem to be a radical departure from the traditional forms of development which have occurred in the region, the fact that the opportunities have been raised by a number of stakeholders and by those who actually control and manage the land assets, reflects a change of thinking and an opportunity.

New product is an integral component of the overall brand positioning for the future for the region and therefore has strategic value because of the change of perceptions it can generate through its ability to entice new market segments which this DMP has identified as needed.

Whilst some of these development opportunities may be slow to come to fruition, Council needs to help drive the assessment of different development opportunities through working with developers and investors to undertake feasibility studies and overall assessments.

As previously indicated, a close working relationship with Seqwater and Council is essential to help drive higher quality and broader visitor and recreational amenities and facilities.

KEY FINDINGS

- Somerset cannot just rely on what it has, it needs to undertake enhancements to its existing product base and create new experiences in order to move ahead as a tourist destination;
- Each town could benefit from having its own clear focus to offer a point of difference;
- Industry needs to be encouraged to package product to make the Somerset offering more appealing and easier to access;
- Gathering statistical information on current visitors throughout the next 12 month period is vital to obtain a much more accurate picture of the visitor profile;
- Council needs to work with industry to expand the accommodation mix, including new and novel opportunities for assessment such as overwater chalets, expanded holiday parks and additional farm stay facilities;
- A series of major walking trails linking to existing trail networks (the Rail Trail etc.) need to be assessed;
- Opportunities for encouraging bird watching and fauna/flora tours need to be facilitated by tourism operators and Council;
- Opportunity for fauna sanctuaries and precincts (deer and/or koalas) need to be further assessed and if viable developed;
- Expanding on the aviation based experiences on offer need to be considered where industry is happy to support this and where aviation trails can be created;
- Better utilising the Seqwater dams for recreational tours needs to be facilitated;
- Expanding opportunities for water skiing, mountain biking, lake kayaking and fishing need to be assessed and promoted;
- Creating a fresh water marine centre (to profile lake and river aquatic species) needs to be assessed and facilitated;
- Opportunities to partner with neighbouring regions to offer a collective product package for food and wine, by way of example, need to be facilitated; and
- Creation of an event strategy offering new organically grown festivals and events needs to be developed.

9. ACTION PLAN

The following are key result areas to help facilitate the successful implementation of this DMP. This action plan contains steps required to realise future opportunities and achieve the recommendations included in this DMP, as well as supplementary actions that can be undertaken to further the success of tourism.

Short term strategies are those to be implemented within the next two years (2014 - 2016), medium term are those within the following three to five years (2017 - 2021) and long term includes those to be undertaken after five or more years (2022 onwards).

TABLE 6: KEY RESULT AREA 1

ATTRACT A BROADER RANGE OF VISITOR MARKETS TO SOMERSET					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Holiday park expansion demand study	Undertake demand study on current caravan/holiday parks to determine whether there is capacity for a new or expanded existing holiday parks	Council and land owners	Short term	$15k for demand study	▪ Undertake demand study by December 2014
Water edge chalets feasibility	Conduct discussions with Seqwater regarding the potential to develop high quality water edge chalets at either Lake Somerset or Lake Wivenhoe. If viewed as a favourable opportunity, a feasibility assessment would need to be undertaken.	Council, SRTA and Seqwater	Medium term	N/A	▪ Initiate discussions between Seqwater, Council and SRTA ▪ If viewed favourably, feasibility assessment to be undertaken by mid 2016
House boat trial period	Conduct discussions with Seqwater regarding the potential to develop a trial period for house boats on either Lake Somerset or Lake Wivenhoe. A feasibility assessment would need to be undertaken prior to this trial.	Council, SRTA and Seqwater	Short term	N/A	▪ Initiate discussions between Seqwater, Council and SRTA ▪ If viewed as favourable, undertake a yearlong trial period of houseboats in 2015 ▪ Undertake feasibility assessment by end of 2016
Walks and trekking planning study	Undertake a planning study regarding a series of walking trails throughout the region (1 hour, 2 hour, overnight and possibly a 2-3 days trekking experience). This would need to include liaison with possible trek and tour operators to gauge interest.	Council	Medium term	$15k for planning study	▪ Undertake planning study by mid 2017
Feasibility assessment for a koala precinct	Hold discussions with Queensland Parks and Wildlife to gather input on the size of the koala population within the region. If sizeable, undertake feasibility assessment on the development of a precinct.	Council in discussions with QLD Parks and Wildlife Service	Short term	$20k for feasibility assessment	▪ Initiate discussions with Queensland Parks and Wildlife by mid-2015 ▪ If favourable, undertake feasibility assessment by start of 2016

ATTRACT A BROADER RANGE OF VISITOR MARKETS TO SOMERSET					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Wildlife photo shoot trekking	Hold discussions with Queensland Parks and Wildlife to gather input on the size of the deer and other wildlife population within the region. If sizeable, go to market with tender to interested operators in running the photo shoot guided tours.	Council in discussions with QLD Parks and Wildlife Service	Short term	$3k for tender process	▪ Initiate discussions with Queensland Parks and Wildlife by mid-2014 ▪ If favourable, go to tender by start of 2015
Creation of aviation heritage trail	In discussions with historic site owners and current aviation precinct owners, develop an aviation heritage trail. Provision should be made for a smart phone app to provide a self-guided tour.	Council in discussions with historic site owners and current aviation precinct owners and TEQ	Short term	$25k for smart phone app development[27]	▪ Initiate discussions by end of 2014 ▪ Develop and being to market trail by mid 2015
Feasibility for aviation history museum	If significant interest exists in the aviation trail, undertake feasibility assessment for the development of an aviation history museum.	Council in discussion with aviation site owner groups and Qld Museum	Long term	$25k for feasibility assessment	▪ Gauge interest in the aviation heritage trail over first few years of operation ▪ If significant interest exists, undertake feasibility for aviation history museum
Feasibility assessment for lake tours	Undertake feasibility into developing a boat tour operation on Lake Somerset or Lake Wivenhoe	Seqwater	Medium term	$20k for feasibility assessment	▪ Undertake feasibility assessment by end of 2015
Fishing and boat hire	Assess potential of establishing a boat hire operation at either Lake Wivenhoe or Lake Somerset	Council in discussions with SRTA and Seqwater	Medium term	N/A	▪ Undertake assessment by mid-2015 ▪ If favourable result, go out to tender for the operation by start of 2016

[27] Potential exists to have this cost covered through app sponsorship or through a government grant.

ATTRACT A BROADER RANGE OF VISITOR MARKETS TO SOMERSET					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Demand/feasibility study assessing development of a water skiing event	Undertake demand/feasibility study to assess the development of a triathlon style event integrating water skiing, fishing and possibly kayaking.	Seqwater, SRTA, Council, TEQ	Medium term	N/A	▪ Demand/feasibility study to be undertaken by January 2015
Mountain biking strategy development	Undertake mountain biking strategy which assesses the development of a range of mountain biking trails in suitable locations throughout the region. This should include a marketing/promotional component, including identification of possible events which could be developed.	SRTA, Council and State Govt	Medium term	$25k for mountain biking strategy	▪ Develop strategy by December 2016
Canoe trails and hire facility	Investigate potential to include canoe/kayak hire at either, or both, of the Lakes.	Council in liaison with Seqwater	Short term	N/A	▪ Undertake assessment by June 2014
Rail trail	Facilitate the completion of the rail trail and a process for its ongoing maintenance	Council, SRTA, land owners, State Govt	Short term	N/A	▪ Council to lead a process for finalising the rail trail and a process for its ongoing maintenance by Dec 2014
Feasibility study for a fresh water interpretive centre	Investigate feasibility for the development of a fresh water interpretive centre at one of the lakes.	Seqwater, Council, TEQ, State Govt	Medium – long term	$30k for feasibility	▪ Undertake feasibility assessment by December 2017
Encourage schools to undertaken field trips to the region	Integrate educational aids into Council's website that teachers can download to educate students. These should be based on specific requirements within the school syllabus.	Council, Brisbane Marketing, SRTA	Short term	N/A	▪ Develop and integrate education aids into Council's website by June 2015

TABLE 7: KEY RESULT AREA 2

GROW VISITOR AWARENESS OF THE REGION AND ITS OFFERINGS					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Packaging of product	The packaging of experiences, dining, accommodation and transport. This will involve a wide range of stakeholders but Council will need to take leadership role and play the facilitation role for this.	Council, SRTA, industry operators and TEQ	Short term	N/A	▪ 3 key product packages to be released by June 2015 ▪ A further 3 product packages to be released by June 2017
Website for the region	Council's tourism advisory committee and major industry operators to meet with Brisbane Marketing to discuss how best to leverage off their new website	Council, and Brisbane Marketing	Short term	-	▪ Meet with Brisbane Marketing prior to their new website launch by April 2014
Boost awareness of Somerset	Develop a visiting journalist famil program	Council and SRTA	Short-medium term	N/A	▪ Formal famil program developed ▪ Minimum of one famil visit per three months is held annually ▪ Number of articles/media releases about Somerset increases ▪ awareness and appreciation of Somerset is increased
Partner with neighbouring regions	Organise discussions with Lockyer Valley Regional Council and South Burnett Regional Council, as well as each region's local tourism organisation to discuss possible packages and synergies which could be developed.	Council in conjunction with Lockyer Valley Regional Council and South Burnett Regional Council	Short term	-	▪ Initiate discussions by June 2015
Demand/feasibility study for the development of new festivals	Undertake demand/feasibility study to assess development of potentially a fishing competition event which could eventually lead into a fresh fishing and food festival	Council, SRTA	Medium term	$12k	▪ Demand/feasibility study to be undertaken by January 2016

TABLE 8: KEY RESULT AREA 3

MAXIMISE VISITOR AND LOCAL COMMUNITY EXPERIENCE OF SOMERSET					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Visitor information centre data	Develop robust template for VIC staff to input visitors to the VICs as well as visitor information data (where visitors are from etc). The template should also include the collection of financial data so a yearly performance report is able to be generated.	Council	Short term	-	▪ Develop template by June 2014 ▪ Template to be inputted into by VIC staff on a daily basis ▪ Council to monitor template input to ensure it is being utilised on a weekly basis
Develop Events Strategy	Create an events strategy including working with industry to facilitate events which can help raise the region's profile and which may offer a gradual and sustainable way of growing visitation and visitor yield	Council	Medium term	$15k	▪ Develop events strategy by December 2015
Visitor services strategy for the region	Commission the development of a visitor services review and strategy to assess the performance of the existing VICs in the region, including financial performance and visitation numbers.	Council	Short term	$16k	▪ Review to be undertaken by October 2014
Tourism awareness program	Develop a community tourism awareness program which demonstrates the significance of tourism for the Somerset economy	Council	Short – Medium term	$15k	▪ Community awareness program developed and rolled out by November 2015

MAXIMISE VISITOR AND LOCAL COMMUNITY EXPERIENCE OF SOMERSET					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Improvement of signage	Development of a signage strategy which identifies ideal signage locations to promote Somerset's attractions/ experiences in a highly appealing way. Additionally, the signage strategy should assess the need and appropriate location for directional signage across the region.	Council	Short – Medium term	$15k for signage strategy and $45k for new sign skins	▪ Signage strategy is developed by December 2015 ▪ Design for new signage completed and tested by March 2016 ▪ New signage designed and submitted for State Government approval by June 2016 ▪ New signage is installed no later than 4 months post State Government approval or by June 2018 whichever is the earlier
Raise the standard of accommodation properties in Somerset	Undertake audit on accommodation properties to assess how they can be made more profitable and what other changes may improve performance	Council in liaison with SRTA and accommodation property operators	Medium term	N/A	▪ Audit to be undertaken by November 2016
Encourage retail operators to stay open for longer hours	Investigate the implementation of a rotational business-staffing system and other possible options. Facilitate the development of an online roster available for retail operators which includes opening hours.	Council, SRTA,, Retail Operators, Chamber of Commerce, external service provider and retail/restaurant operators	Medium term	N/A	▪ Assess all options by June 2015 ▪ Actively encourage retailers to open over weekends and especially when major events are on, by December 2015 ▪ Develop roster program by December 2015

TABLE 9: KEY RESULT AREA 4

FACILITATE DEVELOPMENT OF AND INVESTMENT IN THE SOMERSET TOURISM INDUSTRY					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Communicate and coordinate with the tourism industry	Coordinate the needs of the tourism industry balanced against Council's other strategic requirements (community needs, economic growth initiatives and environmental protection)	Council and the Tourism Advisory Committee	Short term	-	▪ Have quarterly forums with industry to gather input in industry needs and to inform progress
Review Council's planning instruments	Ensure Council town planning processes and policies proactively assist and encourage new forms of tourism development and allow tourism to be strongly profiled	Council and the Tourism Advisory Committee	Medium term	-	▪ Initiate review by March 2015
Promote that Council is open for business	Ensure greater communication with Brisbane Marketing and Tourism and Events Queensland that reflects that Council wishes to actively encourage new investment to grow the tourism sector	Council and the Tourism Advisory Committee	Ongoing	-	▪ Hold biannual meetings with Brisbane Marketing starting July 2014
Profile investment opportunities into Somerset	Create investment memorandum to stimulate investment interest by developers for tourism facilities and which indicates the types of development which Council will actively support in principle	Council and the Tourism Advisory Committee	Short - Medium term	$10k	▪ Memorandum drafted and approved by November 2014 ▪ Investor forum by April 2015
Closer working relationship with Seqwater	Ensure close liaison with Seqwater through quarterly meetings to help drive visitor growth leveraging off Seqwater assets/facilities and the development they support	Council and Seqwater	Ongoing	-	▪ Hold first quarterly meeting by July 2014

10. APPENDICES

10.1. APPENDIX 1 - NATIONAL CARAVAN AND CAMPING DATA

The following data has been sourced from a variety of industry associations[28] and reflects the size and demographic trends as they affect the caravan and camping visitor market overall:

- Australia wide, there is an estimated 8.5m caravan and camping visitors, with 50% aged between 30-54 years and 25% between 55-70 years;
- The bulk of the 30-54 year old age bracket tend to be families travelling primarily during school holiday periods;
- The vast majority choose to stay in cabins or go camping in coastal holiday parks;
- The couples market tend to take short breaks of 3-4 days, with a focus on better quality park cabins in prime locations (we consider this is a niche which Somerset has the potential to market to);
- In the 2012-2013 financial year, 63% of caravan and motor home travellers were aged 55 years or older. These are often referred to as retired and semi-retirees or sundowners but more recently has started to include baby boomers. This market, which Somerset has a good opportunity to capture, prefer to tour in their caravans or motor homes away from school holiday peak periods;
- The international caravan and camping visitor to Australia is significantly different from the domestic caravan and camping visitor. Nearly half (46%) of all international caravanning and camping visitors are aged 20-29 years and contribute 67% of the visitor nights in caravan and camping parks for international visitors;
- Approximately 67% of the international caravan and camping visitors were from Europe, 9.5% were from New Zealand and 6.3% were from the United States;
- Australia's leading visitor market (by value), China, held only 0.5% share of Asian visitation using caravan and camping sites during 2011. For the Asian visitor markets, the bulk of these are on structured tours with a very small percentage hiring campervans or motor homes and with some also being backpackers;

[28] Including the Caravan Industry Association Western Australia, Caravan and Camping Industry Association NSW, Caravan Parks Association of Queensland and the Caravan RV & Accommodation Industry of Australia

- The caravan park environment is seen to offer a unique sense of camaraderie and community which is not found in any other type of tourism accommodation. As evidenced in Somerset (through the feedback from operators), generations of families have grown up together meeting on their annual holidays in the same holiday park and often at the same site;
- Generally, coastal parks in prime locations are geared primarily for family holidays as well as those touring with caravans. Successful holiday and tourist parks have responded to consumer demand for better standards with many having destination park facilities such as swimming pools, kids clubs, camp kitchens, jumping pillows, mini golf, group entertainment, internet access, restaurants, cafes and shops and with a range of accommodation options including cabins (see figure below);

FIGURE 18: BEST PRACTICE FAMILY DESTINATION HOLIDAY PARKS[29]

- By comparison to coastal parks, inland caravan parks often cater for holidays in towns which have particular attractions or events as well as permanents. The majority of inland parks are considered transit parks, where those touring in caravans and motor homes may stay for a night or two on route to another destination. The challenge, as experienced in Somerset, is to encourage these visitors to increase their length of stay;
- There are approximately 2,700 caravan parks in Australia with the majority being in Queensland. The majority of parks are family owned small businesses. Research undertaken into recreational vehicles in 2012 by the NSW Caravan and Camping Association, indicates that every $1 of park income generates $1.38 into the local economy. Commercial caravan parks account for approximately 12% of accommodation industry revenue and 9% of industry employment;

[29] Big 4 Holiday Parks

- Total Australian recreational vehicle production for 2012 was 20,708 units, with traditional caravans representing nearly 54.6%, followed by pop top at 24.4%, camper trailers at 13.8% and motor homes at 5%;
- Luxury camping (glamping) is also appealing to a broader demographic and there is a trend towards safari or pre-erected tents at many holiday parks. This is proving particularly popular with first time campers and couples seeking a short break. High quality glamping opportunities, particularly around the lake areas, is a product which Somerset may have a strategic advantage in developing;
- Domestic regional tourism has been flat for many years (and has actually contracted since 1998), with the exception of the caravan and camping sector which has defied this trend;
- Research undertaken by the Caravan Parks Association of Queensland indicates that rising petrol prices have little impact on the sale or use of holiday caravans and motor homes. The cost of fuel is taken into account when planning a trip but generally will not stop caravaners from enjoying the touring experience. If anything, they may shorten their trip to compensate. A 20¢ per litre increase in the price of fuel only adds approximately 2% to the cost of a caravan holiday and is seen to be negligible in its impact;
- Statistics provided through Tourism Research Australia (2011) indicates that there were 45.3m nights spent in caravan parks nationally, of which 9,513 (or 21%) were accounted for in Queensland;
- The vast majority of those utilising caravan parks came primarily for the purpose of holiday and leisure (77% of domestic visitors and 71% of international visitors);
- In 2013, recreational vehicle production numbers in Australia totalled 15,042, of which 95.1% were caravans or camper trailers and 4.9% were motor homes (motorised recreational vehicles); and
- National caravan vehicle registrations for the year to June 2013 indicated that 405,678 caravans, 114,750 camper trailers and 79,461 motor homes were registered.

10.1.1. Queensland Specific Caravan Data

The following points reflect the size and extent of the caravan and camping market in Queensland:

- The average occupancy rate for powered and unpowered sites in Queensland (based on Australian Bureau of Statistics data) ranges from 37% - 39%;
- It is estimated there are 64k powered and unpowered caravan sites in Queensland (7k of which are estimated to be in Queensland National Parks);
- It is estimated there are just over 550 caravan parks in Queensland; and

- National caravanning vehicles registrations indicate that Queensland's share reflects the majority of registered recreational vehicles in the country, with 166,498 registered vehicles, which represents approximately 28% of all registered recreational vehicles (caravans, camper trailers and motor homes).

10.1.2. Other Trends

Whilst the above National and Queensland specific figures reflect the size and scale of the caravan and camping market, there are other important trends which need to be reflected. This is because a number of caravan parks have consolidated or closed, whilst others have expanded. In general, coastal caravan parks have tended to grow, with their ability to attract a broader market demographic (particularly the family market), whilst a number of transit holiday parks in inland areas have consolidated or closed.

Data provided through industry research[30] indicates the following:

- Tourist park establishments decreased by approximately 280 parks nationally between December 1997 and March 2012, equating to approximately 4-5 parks every quarter over the last 15 years;
- The reduction in the number of parks has seen onsite caravan numbers fall, as well as the number of powered and unpowered sites;
- Over the same period, industry revenue has grown from $500m to $1.2b which equates to approximately 6.75% annual growth in the sector;
- Cabin numbers have more than doubled, resulting in a high number of employees per tourist or holiday park;
- Three million Australians have stayed in a caravan park cabin over the 2010-2011 period;
- 9.3m Australians intend to holiday in a caravan holiday park over the 2012-2013 period, up from 8.6m in 2008;
- 7% of Australians intend to buy a caravan or other recreational vehicle product over the 2012-2013 period;
- Since 2008, people are less likely to free camp and are more likely to stay in a caravan holiday park;
- The internet is the core starting point for consumers when researching holidays, with 69% expecting online booking facilities; and
- 42% of users of caravan parks indicated that they would use a caravan holiday park again in the next 2 year period, with a further 12% over the next 3-5 years.

[30] Caravan, RV and Accommodation Industry of Australia Economic Benefit Report, October 2012 prepared by BDO and Consumer Research Report 2011 - Caravan and Holiday Park Industry prepared for the Caravan RV and Accommodation industry of Australia 2011

10.2. APPENDIX 2 – PRODUCT AUDIT

The following table provides an audit of the attractions, accommodation, recreational facilities as well as cafés/restaurants/bars in the Somerset region.

10.2.1. Accommodation

SOMERSET ACCOMMODATION	
Name	**Accommodation Type**
Atkinson Dam Waterfront Caravan Park	Caravan/Camping
Clancy's Campground & Day-Use Area	Camping
Club Hotel Motel Lowood	Hotel
Domes Retreat	Guesthouse
Esk Caravan Park	Caravan/Camping
Esk Motel	Motel
Esk Wivenhoe Motor Inn	Motel
Exchange Hotel Toogoolawah	Pub
Fernvale Hotel Motel	Motel
Glenn Rocks Motel	Motel
Golden Chain Kilcoy Gardens Motor Inn	Motel
Harlin Hotel Motel	Motel
Hunting Lodge Estate	Guesthouse
Kilcoy Exchange Hotel	Pub
Kilcoy Farmhouse	Guesthouse
Kilcoy Motel	Motel
Lake Somerset Holiday Park	Caravan/Camping
Leopard Tree Lodge	Guesthouse
Linville Hotel	Hotel
Montrose on Moore	Guesthouse
Neurum Creek Bush Retreat	Camping
Norton Motel	Motel
Peach Trees Camp	Camping
Somerhouse	Guesthouse
Somerset Retreat	Guesthouse
Somerset Views Holiday Lodge	Guesthouse
Duckadang Youth Camp	Hostel
SEQ Lakeside Escapes - Lumley Hill Camp	Camping
SEQ Lakeside Escapes - Somerset Park	Camping
SEQ Lakeside Escapes - Captain Logans Inlet	Camping

SOMERSET ACCOMMODATION	
Name	**Accommodation Type**
Camp	
Stanley Hotel	Pub
The Hollow Log Country Retreat	Guesthouse
Toogoolawah Hotel	Pub
Twilight Grove Farm	B&B
Esk Tourist Park	Caravan/Camping
Total	**35**

10.2.2. Food and Wine

SOMERSET FOOD AND WINE	
Name	**Food + Beverage Type**
Chantilly Blue	Café
Coach House Café	Café
CJ's Café - Fernvale	Café
Cormorant Bay Café & Kiosk	Café
Enigmas Café Restaurant	Café
Esk Bakery & Café	Café
Hava Chat Café	Café
Julie's at the Rectory	Café
Nash Gallery and Café	Café
Old Fernvale Bakery	Café
Pol's at Moore	Café
Red Deer Café	Café
Esk Thai Restaurant	Café
The Valley Star Indian Restaurant	Café
Glamorgan Vale Hotel	Pub
Tarampa Hotel	Pub
Esk Grand Hotel	Pub
Bellevue Hotel	Pub
Club Hotel Toogoolawah	Pub
Esk Club Hotel	Pub
Louise's Tables Restaurant	Restaurant
Mount England Estate	Winery

Winya Estate	Winery
Woongooroo Estate Wines	Winery
Total	**24**

10.2.3. Attractions, experiences and tours

SOMERSET ATTRACTIONS, EXPERIENCES AND TOURS	
Name	**Type**
Open Door Gallery	Art Gallery
Bellevue Homestead & Vineyard	Attraction
Brisbane Valley Ostrich & Fish Farm	Attraction
Coolana Olives	Attraction
Rail Trail	Attraction
Watts Bridge Memorial Airfield	Attraction
Esk Show	Event
Kilcoy Show	Event
Lowood Show	Event
Mud Bulls and Music	Event
Equinox Boogie	Event
Somerset Rail Trail Fun Run	Event
Rio Tinto Ride Against Cancer	Event
Kilcoy Races	Event
Esk Races	Event
Toogoolawah Show	Event
Esk Visitor information Centre	Information Centre
Fernvale Future Complex	Information Centre
Somerset Dam	Man Made Lake
Wivenhoe Dam	Man Made Lake
Atkinson Dam	Man Made Lake
Cressbrook Dam	Man Made Lake
Coominya Markets	Markets
Esk Markets	Markets
Fernvale Markets	Markets
Kilcoy Markets	Markets
Conondale National Park	National Park
Dáguilar National Park	National Park
Jimna State Forest	National Park

SOMERSET ATTRACTIONS, EXPERIENCES AND TOURS	
Name	**Type**
Ravensbourne National Park	National Park
Brisbane River	Natural
Cormorant Bay	Park
Esk Lions Park	Park
Esk Pipeliner Park	Park
Esk Skate Park	Park
Fernvale Memorial Park	Park
Lakeview Park	Park
O'Sheas Crossing	Park
Pipe Liner Park	Park
The Spit	Park
Yowie Park	Park
Esk Bowls Club	Recreational
Kilcoy Golf Club	Recreational
Landcruiser Mountain Park	Recreational
Ramblers Skydiving	Recreational
Esk Golf Club	Recreational
Toogoolawah Golf Club	Recreational
Lowood Golf Club	Recreational
Kilcoy Recreational Craft & Information Centre	Retail
Floating Images	Tours
Pterodactyl Helicopters	Tours
Wine Down Tours	Tours
Kilcoy Memorial Hall	Venue
Moore Returned Soldiers Memorial Hall	Venue
Somerset Civic Centre	Venue
Open Door Gallery	Art Gallery
Bellevue Homestead & Vineyard	Attraction
Brisbane Valley Ostrich & Fish Farm	Attraction
Coolana Olives	Attraction
Rail Trail	Attraction
Watts Bridge Memorial Airfield	Attraction
Esk Show	Event
Kilcoy Show	Event
Lowood Show	Event

SOMERSET ATTRACTIONS, EXPERIENCES AND TOURS	
Name	**Type**
Mud Bulls and Music	Event
Equinox Boogie	Event
Somerset Rail Trail Fun Run	Event
Rio Tinto Ride Against Cancer	Event
Kilcoy Races	Event
Esk Races	Event
Toogoolawah Show	Event
Esk Visitor information Centre	Information Centre
Fernvale Future Complex	Information Centre
Somerset Dam	Man Made Lake
Wivenhoe Dam	Man Made Lake
Atkinson Dam	Man Made Lake
Cressbrook Dam	Man Made Lake
Coominya Markets	Markets
Esk Markets	Markets
Fernvale Markets	Markets
Kilcoy Markets	Markets
Conondale National Park	National Park
Dáguilar National Park	National Park
Jimna State Forest	National Park
Ravensbourne National Park	National Park
Brisbane River	Natural
Cormorant Bay	Park
Esk Lions Park	Park
Esk Pipeliner Park	Park
Esk Skate Park	Park
Fernvale Memorial Park	Park
Lakeview Park	Park
O'Sheas Crossing	Park
Pipe Liner Park	Park
The Spit	Park
Yowie Park	Park
Esk Bowls Club	Recreational
Kilcoy Golf Club	Recreational
Landcruiser Mountain Park	Recreational

SOMERSET ATTRACTIONS, EXPERIENCES AND TOURS	
Name	**Type**
Ramblers Skydiving	Recreational
Esk Golf Club	Recreational
Toogoolawah Golf Club	Recreational
Lowood Golf Club	Recreational
Kilcoy Recreational Craft & Information Centre	Retail
Floating Images	Tours
Pterodactyl Helicopters	Tours
Wine Down Tours	Tours
Total	**106**