



Tropical North Queensland Regional **Economic Plan**



The world's leading
sustainable tropical region

Living, working and playing in a tropical paradise

2011-2031



 Tropical North Queensland Regional
Economic Plan

The following partners have endorsed the plan:





Foreword



Tropical North Queensland is blessed with many natural and other advantages, including the skills and approach of our people, reliable water supplies the envy of most areas of Australia, abundant fertile agricultural lands, close proximity to local mineral wealth and economic growth zones in south east Asia and the western Pacific, and of course our beautiful natural environment and surrounds. It is also a place where people want to come to live, work and play.

Despite those advantages the region's economic fortunes over recent decades have fluctuated through cycles of boom then bust, generally for reasons outside of our control. Just when we have been doing well we have had to deal with events and issues such as 9/11, a high AUD, natural disasters both here and in partner countries, and of course the GFC. Those fluctuating cycles have led to ongoing issues with managing the infrastructure, labour and skills needs of the boom times, followed closely by dealing with the human and financial impacts of periods of low economic activity.

It is easy to say as many do that "Someone should do something about it". However, the business and other leaders of Tropical North Queensland have now decided that it is we who should take the lead and do something about it. Rather than reacting to the problems we face in a kneejerk way or bringing a scattergun approach to dealing with them, we decided to develop the Tropical North Queensland Regional Economic Plan. This Plan will allow us to better control and influence our destiny and fortunes going forward, and to work in a more informed and systematic way with Governments at all levels, as well as the private sector, to deliver sustainable economic prosperity for our region.

The **Tropical North Queensland Regional Economic Plan (TNQREP)** outlines a 20 year economic vision for the region and has emanated from and been built on the back of extensive consultation and research carried out over 2010 and 2011. It has been contributed to and subsequently endorsed by over 40 major regional stakeholder organisations, and I would suggest that this makes it the most robust and well thought through regional development plan delivered by a private organisation in the history of both Queensland and Australia. There is every reason to believe that its release marks the beginning of a new era of successful, planned, strategic and co-operative economic development for Tropical North Queensland.

I would like to acknowledge the wonderful efforts of Margaret Darveniza Advance Cairns' Regional Economic Development Officer who has been the key driver of the development of the Plan, and I also acknowledge the generous financial assistance provided by both the FNQ Regional Organisation of Councils and the Office of Northern Australia.

Russell Beer
CHAIRMAN ■ **Advance Cairns**



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Executive Summary

The Tropical North Queensland Regional Economic Plan (TNQREP) marks an exciting maturation in economic development planning for Tropical North Queensland.

The TNQREP is the first document of its kind and embraces a truly expansive regional geographic footprint. The TNQREP has secured multi-tiered government support, and has genuine lasting commitment from the region's key economic drivers who have taken responsibility for delivering the actions ascribed to their organisations.

The TNQREP is a testament to the strategic, ambitious and cooperative spirit of the economic development partners of Tropical North Queensland who formed the Steering Team. This team is motivated to produce sustainable results by coordinating our efforts for mutual, long-term benefit. The Steering Team has recognised that Tropical North Queensland is blessed with many natural advantages and they have been determined to capitalise on this competitive edge as they grow the economy. The TNQREP aligns with existing and proposed strategies and plans whilst proactively seeking to mitigate the cycles of boom and bust experienced by our region when impacted by external forces.

The TNQREP is built upon an understanding of the regional economy and includes an economic profile to inform and monitor the implementation of five year strategies and actions in the interests of achieving the 20 year vision and goals.

Together, TNQ has already begun to realise its economic future by releasing the TNQREP. This represents a positive and proactive move towards realising the region's shared economic vision of being the **World's Leading Sustainable Tropical Region** by 2031. This vision, drawn from the region's intrinsic competitive advantages and illustrated by the mantra, 'living working and playing in a tropical paradise,' forms the basis of the 2031 Strategic Plan and provides the inspiration for long and short-term action.

The TNQREP articulates a triple bottom line approach to achieving this vision and describes the region's goals as a strong and confident tropical economy, an enrichment of lifestyle and liveability, and a natural and built environment which is enjoyed, protected and enhanced.

To reach the economic goal, and ultimately the vision, the TNQREP has identified four long-term outcomes necessary for success: robust and resilient industries; thriving businesses; community confidence, connectedness and capacity; and infrastructure which supports economic growth.

This framework provides the basis for the delineation of strategies and actions for the shorter term horizon which are designed to enable overall economic expansion in the interests of the achievement of a strong and confident regional economy.

The 2011-2016 action plan is structured around 10 key strategies including four growth strategies which focus on strengthening existing and emerging industries and the small to medium business sector including:

- **Actively promote priority growth opportunities**
- **Strengthen and diversify the region's tourism industry and destination appeal**
- **Strengthen the agricultural sector and build market opportunities**
- **Strengthen the small business sector**

The plan also features foundational strategies to empower the economy through:

- **Attracting and enabling industry and enterprise investment**
- **Ensuring optimal transport linkages to facilitate product export to southern and international markets**
- **Developing the skills and capacity of the region's workforce now and into the future**
- **Positioning TNQ as a digital economy**
- **Positioning the region as a leader in sustainable economic development**
- **Developing a confident and united region which projects positivity and cohesiveness**

Each performance-measured strategy consists of a series of time-framed actions attributed to a leader which describes how that strategy will be delivered.



Introduction

THE INTENT

The TNQREP was developed in response to a need to equip the region with:

1. A high level blueprint which articulates a shared economic vision and identifies diverse strategies to achieve that vision;
2. A tool for understanding the regional economy, attracting investment and with 'one voice' driving government policy; and
3. Defined roles and responsibilities.

THE GUIDING PRINCIPLES

The TNQREP will drive a strong, sustainable and diversified economy. It will build on Tropical North Queensland's competitive advantages and areas of specialisation whilst taking account of social, cultural, and environmental elements. Finally, it will align with existing and proposed strategies and plans.

THE IMPLEMENTATION

In a practical sense, the TNQREP will be used:

1. To provide focus and coordination of partner activity;
2. As a platform for identifying opportunities for engagement with the three levels of government; and
3. As a tool for measuring changes in the economy and the impact of the strategies.

An implementation plan will be developed by Advance Cairns that includes mechanisms for monitoring and reporting activity progress, communicating with stakeholders and overall program management. There is a commitment from the partners to an annual review and updating of the plan to ensure currency and responsiveness to emerging issues and opportunities.

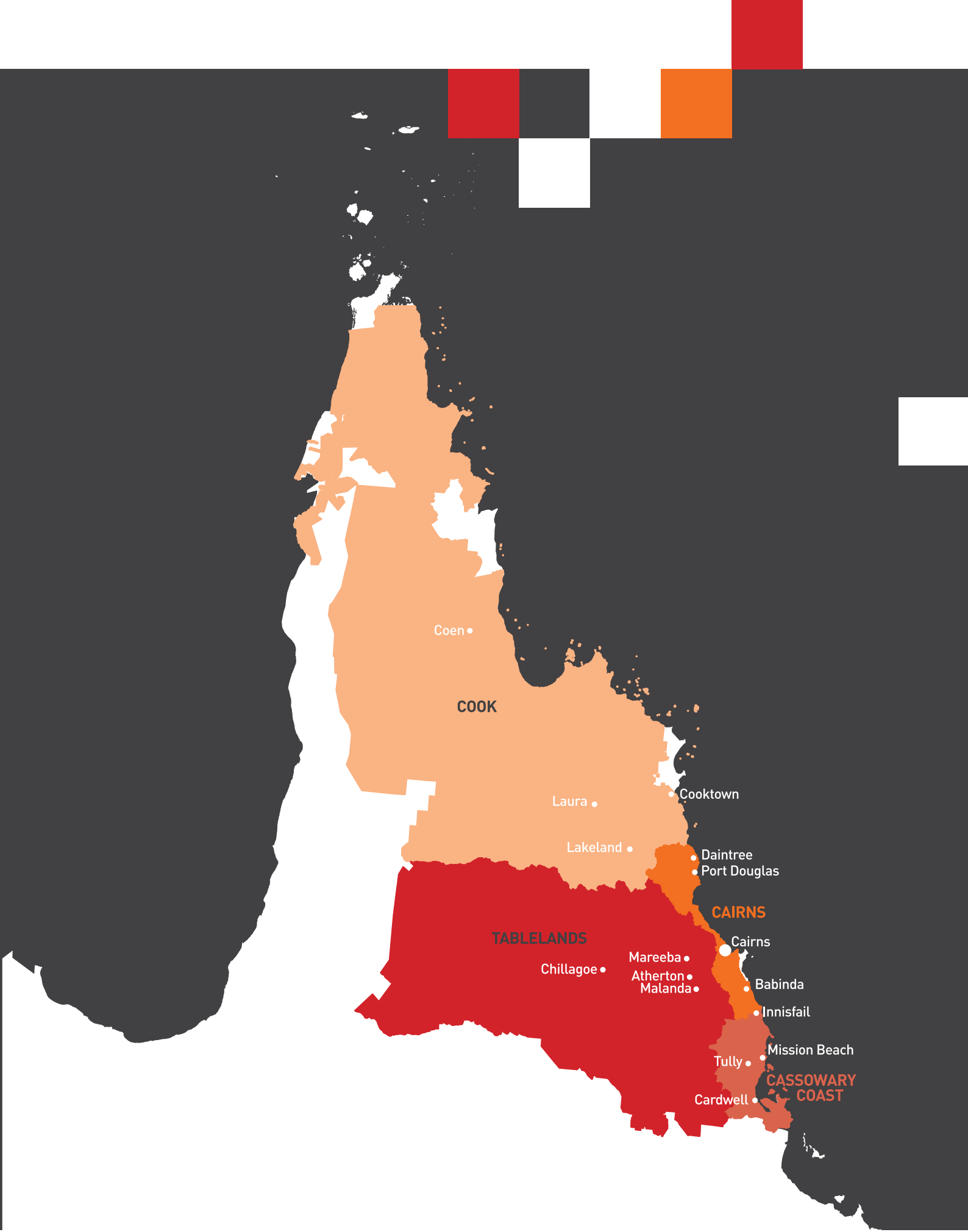
THE GEOGRAPHIC PARAMETERS

The TNQREP is primarily focused on the four Local Government areas of Tropical North Queensland being the Cairns Regional Council, Cassowary Coast Regional Council, the Cook Shire Council and the Tablelands Regional Council.

However, it also acknowledges and integrates the economic links which extend beyond these localities.

These economic links include Cape York Peninsula, the Gulf of Carpentaria, Hinchinbrook, Townsville and the neighbouring indigenous communities.





THE TIME PARAMETERS

The TNQREP recognises we are living in a region (and world) which will be transformed in unanticipated ways during the timeframe of this plan. The TNQREP aims to balance future aspirations with activities to address current realities, and establishes a framework which connects these two horizons. The first horizon of up to five years provides an opportunity for the partners to collaborate on priority strategies in order to overcome current economic challenges and capitalise on emerging opportunities. The second horizon extending up to 20 years is about influencing trends and setting economic directions to ensure the vision remains the focus.

THE STEERING TEAM

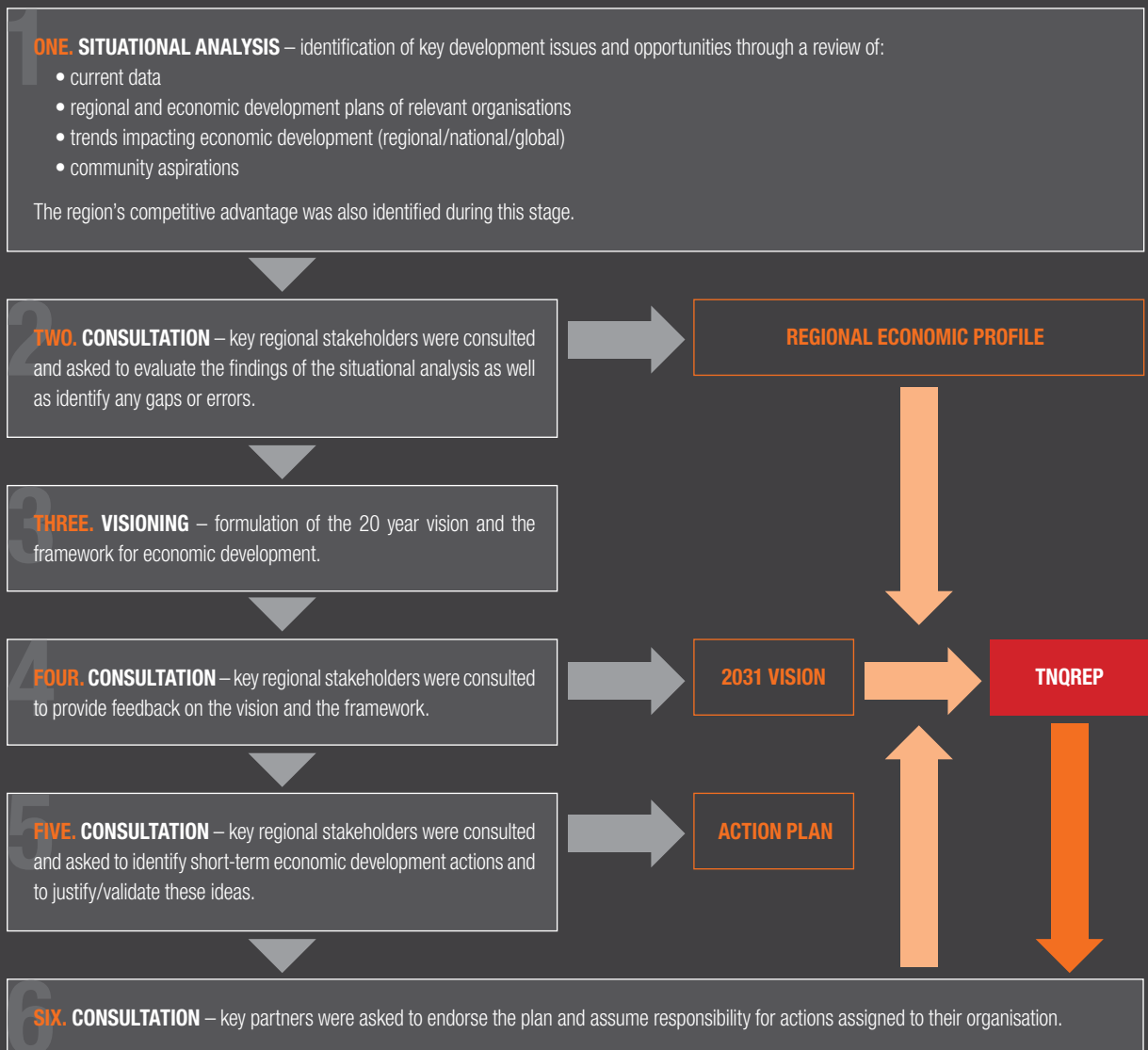
The following organisations committed to collaborate on developing, endorsing and enacting the TNQREP:

- **Advance Cairns**
- **Australian Government** – Department of Regional Australia
- **Cairns Regional Council**
- **Cassowary Coast Regional Council**
- **Cook Shire Council**
- **Far North Queensland Regional Organisation of Councils**
- **James Cook University**
- **Queensland Government** through the Department of Employment Economic Development and Innovation (DEEDI) and the Department of Local Government and Planning (DLGP)
- **Regional Development Australia (FNQ&TS)**
- **Tourism Tropical North Queensland**
- **Tablelands Regional Council**

It is anticipated the membership of the Steering Team may change over the next 20 years but it shall remain current by including the key partners in regional economic development in Tropical North Queensland. Advance Cairns has taken the lead role in managing the TNQREP, although the member organisations of the Steering Team will continue to invest resources into the annual implementation, monitoring and evaluation process to ensure the TNQREP remains relevant and inspiring for the duration of its lifetime.

THE TNQREP DEVELOPMENT PROCESS

The Steering Team constructed a development process which was inclusive, open, and consultative whilst also recognising and building on existing partnerships. The TNQREP went through several phases throughout its development and some steps are ongoing.





STRATEGIC CONTEXT

The TNQREP has been designed to complement several other significant planning initiatives including the Far North Queensland 2009-2031 Regional Plan and Regional Development Australia Far North Queensland and Torres Strait (RDA) Roadmap. It is a key element in the implementation of the Regional Plan and differs from the Roadmap by focussing on economics, only considering social and environmental issues to the extent of their relevance to this focus.

As the RDA Roadmap sits above the TNQREP in the sense it encompasses a larger area and a broader spectrum of issues, there are also the Local Government Area's (LGA) long-term community plans and economic strategies which focus on smaller geographical areas and more specific issues. The intention is the RDA Roadmap, the Regional Plan, the TNQREP and the LGA's community plans and economic development strategies will form an aligned strategic framework, avoiding unnecessary duplication.



Working Together

RDA ROADMAP TNQREP LOCAL GOVT PLANS



Regional Economic Profile 2011

A HISTORY OF THE ECONOMY OF TROPICAL NORTH QUEENSLAND

The traditional Aboriginal people of the different language and clan groups who inhabited this region prior to European settlement had local and sustainable economies based on the natural resources available to them. Aboriginal people relied on the availability of seasonal foods from the land and sea. Trade was very important with neighbouring and more distant Indigenous people as it provided an economy which was important for survival and maintenance of respectful relationships with other Aboriginal people of our region. Today the traditional Aboriginal people of our region still have a strong connection to their homelands and have an important role to play in the economic development of Tropical North Queensland.

During his voyage along the Australian east coast in 1770 Captain James Cook named many of our regional features and recorded the potential of the land. As a result of his encounter with the Great Barrier Reef, Captain Cook spent his longest stay on Australian soil alongside the Endeavour River near what is now Cooktown. Some would say he was the region's first tourist.

Despite its immense potential, Tropical North Queensland was late in being settled by Europeans. Cairns was not founded until 1876 by which time Sydney was almost 100 years old. Progress was slow and hard won. Some of the major milestones in the past 130 years are identified below.

1880s GOLD RUSHES. Cooktown became the second largest town in Queensland. Cairns was established as a regional centre.

1941. The region was pitched into the forward lines of Australia's defence. Post-war land was issued to returning soldiers. European migrants flocked to the cane fields.

1950s. The region had a narrow-economy based on primary industries including tobacco, sugar and timber.

1980s. International investment grows the tourism industry including Daikyo and Christopher Skase's Port Douglas resort.

1981. The Great Barrier Reef was granted World Heritage listing, followed by Wet Tropics rainforests in 1988.

1984. Cairns International Airport terminal redevelopment (stage 1 complete).

2000. Deregulation of dairy and sugar industries.

Mid 2000s. Construction boom.

2009. Global Financial Crisis impacted heavily on tourism, resource and construction sectors.

2011. \$A exceeds parity with \$US.

Natural disasters occur across Australia, Japan and New Zealand, including Tropical Cyclone Yasi which hit Far North Queensland.

Undoubtedly the region's economic history has been characterised by cycles of boom and bust driven by external factors. The need to address this by diversifying and strengthening the economy was recognised in July 2010 when representatives of Local, State and Federal Government, along with peak industry bodies, met and committed to the development of the Tropical North Queensland Regional Economic Plan. For the first time the key economic players of Tropical North Queensland were united in an effort to proactively and assertively determine the region's economic future.

2011 ECONOMIC PROFILE

The **TNQ Regional Economic Profile 2011** is designed to provide a snapshot of Tropical North Queensland which can be used to both inform and map Tropical North Queensland's progress towards our economic development vision. It is a factual report providing an analysis of key economic, demographic and historical data based on Local Government Area (LGA) statistics for the region covered by the Cairns, Cassowary, Cook and Tablelands Local Government Areas.

Data was sourced with the assistance of the Office of Economic and Statistical Research (OESR).

The profile has avoided data which has been interpreted by a third party to ensure consistency and reliability of the data.

The annual review of the Regional Economic Profile will enable progress against the TNQREP to be informed, measured and evaluated.

TRENDS AFFECTING THE REGIONAL ECONOMY

Global, national and regional trends have a profound impact on the economic development and sustainability of any region throughout the world. Over the next 20 years, Tropical North Queensland faces a number of challenges and opportunities which are driven to some extent by external forces.

The trends identified in this profile will change over time. However, at present these trends have been identified as having an impact upon the development of the Tropical North Queensland region over the next two decades. Essentially they provide a context to the TNQREP and will be reviewed annually to incorporate new trends as they emerge.

In the global arena Tropical North Queensland is exposed to the implications of changing climatic conditions, increasing energy, fuel and fertiliser prices, the rise in economic strength and influence of the Asian economies, the resources boom, fluctuations of the exchange rate and the rapid pace of technological improvements and new developments.

Tropical North Queensland is also impacted by national trends such as an ageing workforce, the growing infrastructure needs of a regionalised country and the implications of the carbon and digital economies.

The lingering effects of the Global Financial Crisis including residual high unemployment levels and low levels of investor and business confidence continue to impact the regional economy as we plan for 2011-16. The dominance of the two key regional industries of tourism and primary production, both of which are built on the region's natural assets and are exposed to climatic, political and fiscal fluctuations, have led to a series of boom and bust cycles. Inherent in the region's geography are the difficulties associated with distance from capital cities, the opportunities associated with the proximity to Asia and the risks associated with an extreme tropical climate. The region is also home to a large Indigenous population who have disproportionately higher unemployment, lower income and skill levels, and significant social and economic disadvantage.

To build our resilience to cope with these challenges the TNQREP needs to recognise their influence and identify strategies which protect us from adverse effects and position the region to seize the opportunities these trends present.



CONTEXT ANALYSIS AS AT 2011

TNQ REGIONAL ECONOMIC STRENGTHS

- The environment (including two World Heritage sites) and the lifestyle make the region an area that people want to visit, do business in and live in.
- The region has an abundance of fertile soil, plentiful water and agricultural expertise and experience.
- We are one of the few first world economies located in the tropics providing scope for knowledge industries including tropical expertise, bio fuels, tropical health and medicine.
- A series of diverse productive industry clusters have been established.
- A truly multicultural society that recognises and celebrates a rich cultural heritage.
- A range of lifestyle options.
- The region boasts a capital city standard airport and international standard infrastructure (e.g. university, convention centre)
- A culture of innovation.
- An established research and development capacity.
- Abundant renewable energy technology inputs in water, sun, wind, geothermal characteristics and agricultural by-products.

TNQ REGIONAL ECONOMIC CHALLENGES

- An absence of all-weather road and rail infrastructure to link inter and intra-regional logistics. Limited air freight opportunities.
- Overcoming issues surrounding the availability of freehold land, particularly in Cape York.
- Primary products are exported with minimal value added.
- Concerns regarding the availability, consistency and reliability of economic data at the regional level.
- Limited access to reliable and consistent high speed internet access and mobile phone service.
- Lack of economic confidence and limited access to finance.
- Adjusting to the economic implications of a Carbon Tax.
- Regulatory restrictions on the usage of land.
- A large indigenous population experiencing high levels of unemployment and social disadvantage.

TNQ REGIONAL ECONOMIC OPPORTUNITIES

- Activity of near neighbours eg. PNG, Guam and Asia Pacific provides real potential for economic growth.
- Current focus of domestic governments on regional Australia (e.g. Regional Development Australia).
- Predicted increase in mining activity both in Australia and in near neighbouring countries provides economic and employment opportunities, but could also result in the recurrence of skill shortages.
- Indigenous culture and heritage is an attraction and asset which is gaining in momentum.
- Native title laws have provided opportunities for traditional owners to undertake business and cultural ventures.
- Land available for development, to support a regionalisation strategy.
- Potential to increase mining activities in the North Eastern Minerals province and grow the associated support services.
- There is scope to grow the existing major industries (agriculture and tourism).
- Potential for the expansion of Seaport infrastructure.
- Future plans for a national broadband network.
- Carbon offset strategies involving farmland and natural environment.

TNQ REGIONAL ECONOMIC RISKS

- Continued exposure to boom and bust cycles if reliance on narrowly focused primary production and tourism continues.
- High interest rates and soaring Australian dollar values increase costs such as fuel and fertiliser and reduce competitiveness in domestic and international markets.
- Lack of guaranteed access to markets – risk of isolation in times of disaster.
- Effects of climate change on the environment and thereby the lifestyle and the economy.

COMPETITIVE ADVANTAGE

Through both research and consultation the region's economic competitive advantage has been identified as being founded on its location and natural assets.

Tropical North Queensland has a tropical climate with plenty of sunshine and water, incredible biodiversity within an environment and a relaxed and healthy lifestyle.

As a developed nation in the tropics we have the technology, health, education and social structures within a politically stable environment to capitalise upon our natural environment and our global location.

Economically we have an inherent specialisation in those areas associated with our location and natural assets. This extends beyond the core of primary production and tourism to industries such as marine and aviation, the provision of tropical expertise and the supply of support services to businesses, industry and the community.

This plan has been developed to accentuate this competitive advantage and to build upon our assets both natural and commercial.

PERFORMANCE INDICATORS

Four performance indicators have been selected to provide a statistical overview of the Tropical North Queensland region:

- Demography
- Labour Market
- Industry Profiles
- Business Profile



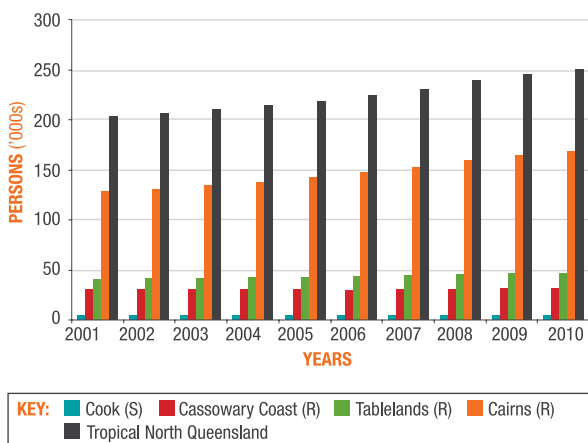
Demography

POPULATION GROWTH

Between 2005 and 2010 the average annual growth rate for Tropical North Queensland was 2.8%, which was higher than the Queensland average of 2.5%. The Cairns Local Government Area (LGA) experienced the greatest annual growth rate with 3.5% population growth.

From June 2009 to June 2010 Tropical North Queensland's population grew from approximately 245,608 persons to 250,455.

GRAPH 1. POPULATION BY LOCAL GOVERNMENT AREA



C = City S = Shire R = Regional Council

Note: Based on ASGC 2010.

The sum of the Local Government areas may not be equivalent to the region total due to confidentialisation of the Local Government area data. Data for Local Government areas (2010) are derived from concordant population-based statistical local area data (ASGC 2006).

Source: Australian Bureau of Statistics, Regional Population Growth, Australia, 2009-10, cat. no. 3218.0 and unpublished data.

POPULATION PROJECTIONS

The current regional population projections were released in 2011. The population for Tropical North Queensland is projected to increase by an average annual growth (Av A G) rate of 1.5% between **2011 and 2031**, being from 255,851 persons to 341,365 persons. This is 0.3% lower than the expected Queensland population growth over the same period and will represent 5.2% of Queensland's total population in 2031.

The majority of this growth is expected to take place within the Cairns Regional Council Local Government Area with an average annual growth rate of 1.7%.

TABLE 1. PROJECTED POPULATION AS AT 30 JUNE Av A G

LGA	2011	2016	2021	2026	2031	2011 - 2031
	NUMBER					PERCENT
Cairns (R)	172,890	190,657	207,756	224,426	241,494	1.7
Cassowary Coast (R)	31,371	32,307	33,198	34,046	34,841	0.5
Cook (S)	4,018	4,287	4,544	4,831	5,157	1.3
Tablelands (R)	47,572	50,622	53,464	56,500	59,873	1.2
TNQ	255,851	277,873	298,962	319,803	341,365	1.5
QLD	4,611,491	5,092,858	5,588,618	6,090,548	6,592,858	1.8

S = Shire R = Regional Council

(a) Data are based on a medium series.

Note: Based on ASGC 2010.

Source: Queensland Government Population Projections, 2011 edition.



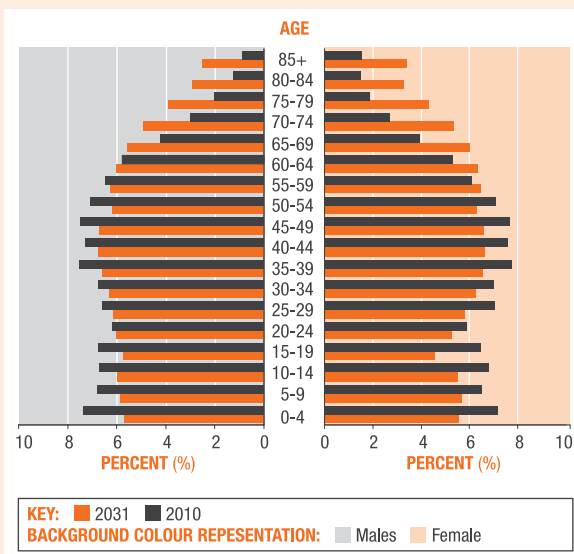
POPULATION BY AGE

Tropical North Queensland demographic population projections highlight the shift toward an ageing population. Overall however the Tropical North Queensland region has quite a young median age profile influenced by young age group profiles within the Indigenous population and high inward migration in working and family creation age levels to the Cairns and Port Douglas regions. This differs quite substantially to other lifestyle regions which attract high inward migration of retirees. This is balanced to some degree however by higher age profiles of the Tablelands and Cassowary Coast rural areas.

INDIGENOUS POPULATION

At the time of the 2006 Census there were 17,248 persons in the TNQREP Region who stated they were of Aboriginal or Torres Strait Islander origin. These persons made up 8.2% of the total population (compared with 3.3% in Queensland). The Cairns Local Government Area contained the greatest number of Indigenous persons (10,738) while the Cook Shire contained the largest proportion of Indigenous persons at 16.1%.

GRAPH 2. TROPICAL NORTH QUEENSLAND REGION AGE BY SEX, 2010 AND 2031



Source: Queensland Government Population Projections, 2011 edition.

TABLE 2. PROPORTION OF POPULATION OF INDIGENOUS STATUS BY LOCAL GOVERNMENT AREA, 2006

LGA(a)	INDIGENOUS PERSONS (NO.)	INDIGENOUS PROPORTION (%)	TOTAL PERSONS(B) (NO)
Cairns (R)	10,738	7.8	137,623
Cassowary Coast (R)	2,311	8.3	27,785
Cook (S)	559	16.1	3,463
Tablelands (R)	3,640	8.9	40,907
TNQ	17,248	8.2	209,778
QLD	127,578	3.3	3,904,532

S = Shire R = Regional Council

(a) Based on place of usual residence.

(b) Includes Indigenous status not stated.

Note: Based on ASGC 2010.

The sum of the Local Government areas may not be equivalent to the region total due to confidentialisation of the Local Government area data.

Data for Local Government areas (2010) are derived from concorded population-based statistical local area data (ASGC 2006).

Source: Australian Bureau of Statistics, Census of Population and Housing, Indigenous Profile - I02.

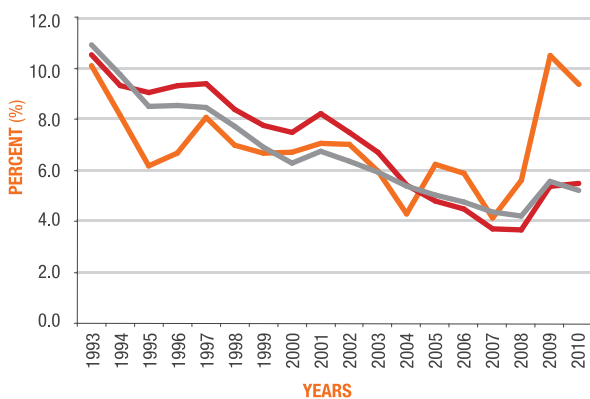
Labour Market

EMPLOYMENT

Given the impact of the global financial crisis and recent natural disasters on this region it is not surprising unemployment in Tropical North Queensland has increased over the past four years from a low of 4.3% in August 2008 to a high of 13.8% in September 2009 and falling to 6.5% in August 2011. The sectors which have been most heavily impacted include tourism, construction and retail.

The figure below compares the unemployment rate of the Far North Queensland Labour Force Region with that of Queensland and Australia in a historical context over the period of 1993 to August 2011. This graph highlights the volatile nature of the Far North Queensland economy compared to the QLD and Australian averages. It showcases the vulnerability of the Far North Queensland economy in responding to international, national and local challenges. The region's dependence on industries which require a sound global and national market is clearly evident.

GRAPH 3. UNEMPLOYMENT RATE IN THE FAR NORTH QUEENSLAND LABOUR FORCE REGION



KEY: Tropical North Queensland Queensland Australia

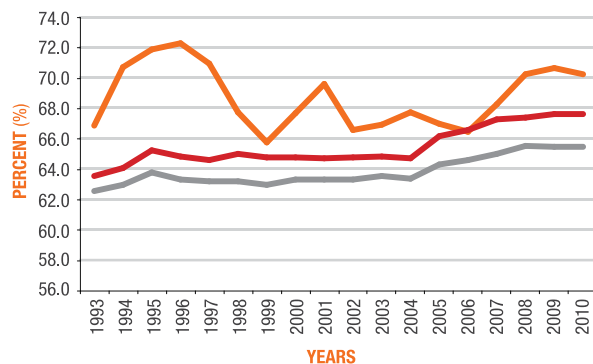
Source: ABS, Labour Force, Australia, Detailed - Electronic Delivery, July 2011 (cat 6291.0.55.001) *Calculated from first principles, using the average number of unemployed persons over the 12 month period to the reference month, divided by the average number of persons in the labour force over the 12 month period to the reference month.

Note: The Far North Queensland Labour Force region includes Local Governments which are not included in the Tropical North Queensland region.

Additional insights into the labour force of the region can be gained by considering the participation rate and the total number employed. Graph 4 shows the Far North Queensland area has a higher than the state or national average participation rate, while Graph 5 demonstrates

the number of persons employed has risen from 99,000 to 135,000 in the past 17 years (a gain of 36%). Over the same period the total number of persons employed in Queensland rose by 68.6%, from approximately 1.37 million to 2.31 million, indicating that the workforce has continued to grow.

GRAPH 4. PARTICIPATION RATE ('000S) AS AT JUNE



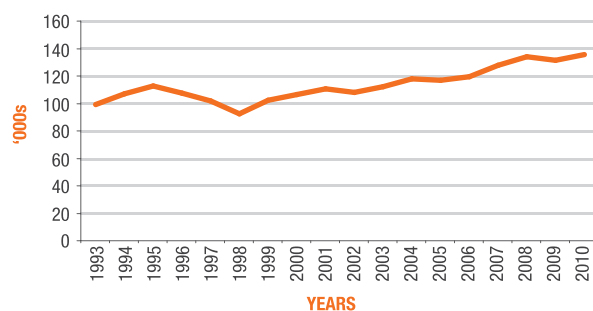
KEY: Far North Queensland Queensland Australia

Source: ABS, Labour Force, Australia, Detailed - Electronic Delivery, July 2011 (cat 6291.0.55.001)

Note: The participation rate is the proportion of the population aged 15 years and over who are in the labour force.

Employed (000's at June) - Persons aged 15 years and over are considered employed if, during the week prior to answering the question, they worked for one hour or more for pay, profit, commission or payment in kind in a job, business, or on a farm.

GRAPH 5. EMPLOYED PERSONS IN THE FAR NORTH QUEENSLAND LABOUR FORCE REGION



KEY: Far North Queensland

Source: ABS, Labour Force, Australia, Detailed - Electronic Delivery, July 2011 (cat 6291.0.55.001).



WAGES

In 2008-09, the average wage and salary across Tropical North Queensland was \$39,487, lower than Cairns (\$41,228) but higher than Tablelands (\$35,842), Cassowary Coast (\$34,442) and Cook (\$31,993).

TABLE 3. AVERAGE ANNUAL PERSONAL INCOME BY SOURCE OF INCOME BY LOCAL GOVERNMENT AREA, TROPICAL NORTH QUEENSLAND REGION, 2008-09 (a)

LOCAL GOVERNMENT AREA	WAGE & SALARY	UNINCORPORATED BUSINESS	INVESTMENT (B)	OTHER (C)	TOTAL
	— \$ —				
Cairns (R)	41,228	16,448	6,169	6,404	41,588
Cassowary Coast (R)	34,442	15,880	7,818	4,887	35,733
Cook (S)	31,993	9,492	5,132	7,238	31,294
Tablelands (R)	35,842	10,130	6,488	6,005	34,358
TNQ	39,487	14,698	6,420	6,140	39,504
QLD	44,501	16,904	7,155	7,238	44,239

S = Shire R = Regional Council

(a) These data have been subjected to confidentialisation. No reliance should be placed on table cells with small values.

(b) Does not include superannuation earners.

(c) Other includes superannuation earners, annuity earners and earners reporting any other source of income on the individual tax return. In the main these include attributed foreign income but exclude Government pensions and allowances.

Note: Based on ASGC 2010.

Source: Australian Bureau of Statistics, Estimates of Personal Income for Small Areas, 2003-04 to 2008-09, cat no. 6524.0.55.002.

EDUCATION

At the time of the 2006 Census, there were 85,476 persons aged 15 years and over with a qualification, or 52% of this age group. This proportion was higher than the Queensland average of 50.4%, however evidence suggests it is dominated by lower level Certificate qualifications. In the Tropical North Queensland region there were 16,815 persons with a Bachelor degree or higher, 10,212 with an Advanced Diploma or Diploma and 32,225 persons with a vocational certificate. Of persons aged 15 years and over with a qualification, 19.7 per cent had a Bachelor degree or higher (26 per cent in Queensland), 11.9 per cent had an Advance Diploma or Diploma (13.1 per cent in Queensland), and 37.8 per cent had a certification (35.5 per cent in Queensland).

TABLE 4. QUALIFICATIONS OF THE TROPICAL NORTH QUEENSLAND LABOUR FORCE(a)(b), 2006

LOCAL GOVERNMENT AREA	PERSONS WITH A QUALIFICATION(C) (NO.)	PERCENT (%)
Cairns	58,752	54.6%
Cassowary Coast	9,803	44.9%
Cook	1,472	53.2%
Tablelands	15,449	47.9%
TNQ	85,476	52.0%
Total QLD	1,560,868	50.4%

(a) Based on place of usual residence. (b) Persons aged 15 years and over.

(c) Persons aged 15 years and over, includes 'inadequately described' and 'not stated' level of education responses.

Note: Based on ASGC 2010.

The sum of the Local Government areas may not be equivalent to the region total due to confidentialisation of the Local Government area data. Data for Local Government areas (2010) are derived from concordant population-based statistical local area data (ASGC 2006).

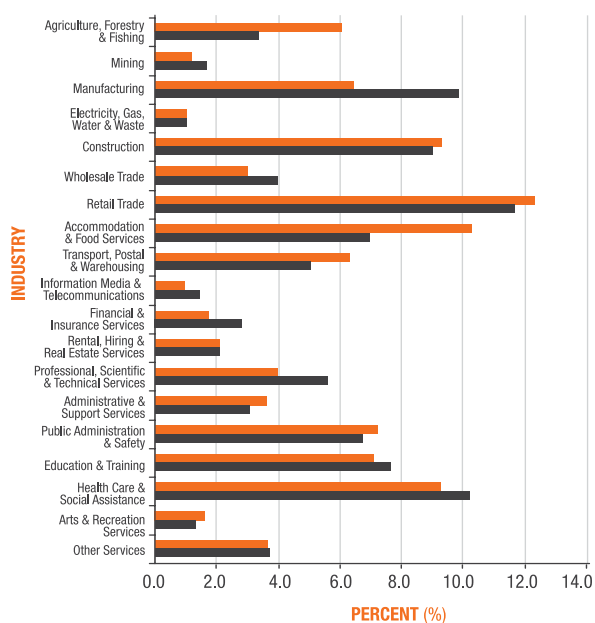
Source: Australian Bureau of Statistics, Census of Population and Housing, 2006, Basic Community Profile - B05 and B39.

Industry Profiles

EMPLOYMENT BY INDUSTRY

At the time of the 2006 Census, retail trade was the largest employing industry in the Tropical North Queensland region, with 12,116 persons or 12.3% of the workforce employed in this area. Other industries with large numbers of employed persons include accommodation, cafes and restaurants (10,122 or 10.3%), construction (9,181 or 9.3%) and health care and social assistance (9,096 or 9.2%).

GRAPH 6. EMPLOYMENT BY INDUSTRY (a)(b), TROPICAL NORTH QUEENSLAND REGION, 2006



KEY: ■ Tropical North Queensland Region ■ Queensland

(a) Employed persons aged 15 years and over.

(b) Industry of employment was coded to the ABS 2006 Australian and New Zealand Standard Industrial Classification (ANZSIC). This has replaced the 1993 ANZSIC edition.

Note: Based on ASGC 2010.

The sum of the Local Government areas may not be equivalent to the region total due to confidentialisation of the Local Government area data.

Data for Local Government areas (2010) are derived from concorded population-based statistical local area data (ASGC 2006).

Source: Australian Bureau of Statistics, Census of Population and Housing, 2006, Basic Community Profile - B42.

Retail Trade, Accommodation and Food Services, Transport, postal and Warehousing, and Administration and Support services industries are listed by the Tourism Satellite Accounts (ABS) as the top four Industries which are directly affected by Tourism. However, the extent of the direct impact from tourism varies between each industry with over half of all industries having a direct impact. When indirect impacts are considered, the number of industries impacted by tourism may increase.



INDUSTRY SPECIALISATION

The highest specialisation ratios in the region occurred in the industries of Agriculture, Forestry and Fishing (1.80), Accommodation and Food Services (1.47) and Transport, Postal and Warehousing (1.24). Employment within Agriculture, Forestry and Fishing is more dominant in regional areas outside of Cairns, while Accommodation and Food Services and Transport, Postal and Warehousing are more significant employers within the Cairns region.

A specialisation ratio which is higher than 1 indicates a higher percentage of employment within that industry compared to the percentage for Queensland. It is evident from the data that industries which tend to dominate within the Tropical North Queensland region tend to be low skilled, requiring low level qualifications. These industries i.e. Agriculture, Retail, Construction and Tourism tend to be the most susceptible to fluctuations in the economy.

TABLE 5. EMPLOYMENT BY INDUSTRY (a) (b), TROPICAL NORTH QUEENSLAND AND QUEENSLAND 2006

INDUSTRY	TNQ REGION		QLD		SPECIALISATION RATIO (c)
	NUMBER	%	NUMBER	%	
Agriculture, Forestry & Fishing	5,985	6.1	61,735	3.4	1.80
Mining	1,156	1.2	30,721	1.7	0.70
Manufacturing	6,302	6.4	180,212	9.9	0.65
Electricity, Gas, Water & Waste Services	1,020	1.0	18,540	1.0	1.02
Construction	9,181	9.3	164,936	9.0	1.03

**TABLE 5. EMPLOYMENT BY INDUSTRY (a) (b),
TROPICAL NORTH QUEENSLAND AND
QUEENSLAND 2006 [CONTINUED]**

INDUSTRY	TNQ REGION		QLD		SPECIALISATION RATIO (C)
	NUMBER	%	NUMBER	%	NUMBER
Wholesale Trade	2,933	3.0	72,075	3.9	0.76
Retail Trade	12,116	12.3	212,422	11.6	1.06
Accommodation & Food Services	10,122	10.3	127,631	7.0	1.47
Transport, Postal & Warehousing	6,189	6.3	92,614	5.1	1.24
Information Media & Telecommunications	968	1.0	26,347	1.4	0.68
Financial & Insurance Services	1,724	1.6	52,035	2.9	0.61
Rental, Hiring & Real Estate Services	2,049	2.1	37,983	2.1	1.00
Professional, Scientific & Technical Services	3,893	4.0	102,416	5.6	0.71
Administrative & Support Services	3,524	3.6	55,705	3.1	1.17
Public Administration & Safety	7,100	7.2	122,416	6.7	1.08
Education & Training	6,952	7.1	139,090	7.6	0.93
Health Care & Social Assistance	9,096	9.2	186,336	10.2	0.91
Arts & Recreation Services	1,568	1.6	24,625	1.3	1.18
Other Services	3,611	3.7	68,361	3.7	0.98
TOTAL (d)	98,349	100	1,824,996	100	1.00

(a) Employed persons aged 15 years and over.

(b) Industry of employment was coded to the ABS 2006 Australian and New Zealand Standard Industrial Classification (ANZSIC). This has replaced the 1993 ANZSIC edition.

(c) The ratio of the percentage for the region to the percentage for Queensland.

(d) Includes inadequately described and not stated responses.

Note: Based on ASGC 2010.

The sum of the Local Government areas may not be equivalent to the region total due to confidentiality of the Local Government area data.

Data for Local Government areas (2010) are derived from concorded population-based statistical local area data (ASGC 2006).

Source: Australian Bureau of Statistics, Census of Population and Housing, 2006, Basic Community Profile - B42



AGRICULTURE

Agriculture is a major economic driver in the Local Government areas outside Cairns contributing significantly to employment, investment and domestic spending across Tropical North Queensland. The region is a major contributor to the value of agricultural production in Queensland. In 2005-06 the region contributed 10.2% (\$890.5 million) to the total value of agricultural production.



The production of crops contributed most to the value agricultural production in the region with Cassowary Coast the major contributor producing more than half (\$454 million) the total value of production.

**TABLE 6. VALUE OF AGRICULTURAL PRODUCTION
(a)(b) BY LOCAL GOVERNMENT AREA,
TNQREP REGION, 2005-2006**

LGA	CROPS		LIVESTOCK SLAUGHTERINGS		LIVESTOCK PRODUCTS		TOTAL
	\$M	%	\$M	%	\$M	%	
Cairns (R)	111.6	98.3	1.9	1.7	0.0	0.0	113.6
Cassowary Coast (R)	454.0	98.0	8.9	1.9	0.3	0.1	463.3
Cook (S)	14.2	34.2	27.4	65.8	0.0	0.0	41.7
Tablelands (R)	149.5	55.0	87.0	32.0	35.5	13.1	272.0
TNQ	729.4	81.9	125.2	14.1	35.9	4.0	890.5
QLD	4,167.9	47.9	4,125.2	47.4	415.8	4.8	8708.9
Region as % of QLD	17.5		3.0		8.6		10.2

(a) Gross value of agricultural commodities produced.

(b) The estimates in this collection are based on information obtained from a sample drawn from the total agricultural business population in scope of the collection, and are subject to sampling variability; that is, they may differ from the figures that

Note: Based on ASGC 2010.

The sum of the Local Government areas may not be equivalent to the region total due to confidentiality of the Local Government area data.

Data for Local Government areas (2010) are derived from concorded population-based statistical local area data (ASGC 2006).

Source: Australian Bureau of Statistics, Agricultural Commodities, Australia, 2005-06, cat. no. 7125.0.

TOURISM

Given Tropical North Queensland's idyllic location AS the gateway to two World Heritage wonders - the Great Barrier Reef and the Wet Tropics Rainforest - Tropical North Queensland has earned a reputation as an international and domestic tourist destination. The Tropical North Queensland region welcomes approximately 2.1 million visitors per year to take advantage of our 600+ tours and attractions which are on offer. In the past 30 years tourism has been the fastest growing economic activity in the region and provides significant employment both directly and in a wide range of support industries. 20% of jobs in the Tropical North Queensland region are directly related to tourism. The value of tourism in the Tropical North Queensland community equate to \$11,000 per person each year. It is Australia's fourth most popular destination for international holiday visitors after Sydney, Melbourne and the Gold Coast.

TABLE 7. VISITORS TO TROPICAL NORTH QUEENSLAND

YEAR ENDING DECEMBER	INTERNATIONAL VISITORS	DOMESTIC VISITORS	EXPENDITURE
	— NUMBERS —		\$
2000	779,202	1,356,000	not recorded at regional level
2001	813,453	1,258,000	
2002	795,350	1,223,000	
2003	746,126	1,411,000	
2004	806,341	1,446,000	
2005	855,403	1,118,000	\$2.6B
2006	857,581	1,499,000	\$2.6B
2007	839,243	1,336,000	\$2.4B
2008	754,690	1,480,000	\$2.5B
2009	648,073	1,425,000	\$2.2B
2010	682,698	1,218,000	

Source: Tourism Research Australia, Online database.



Business Profile

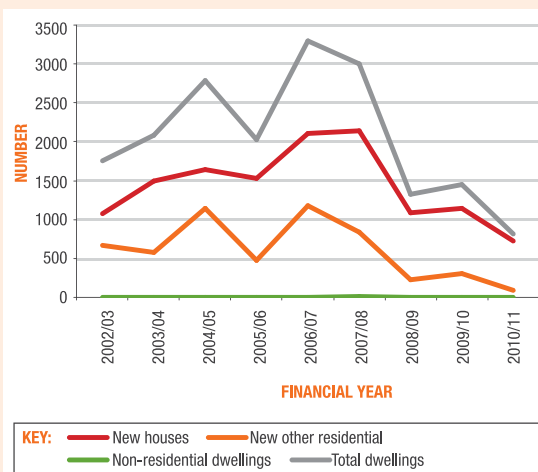
In 2009 there were **23,343** businesses registered in the Tropical North Queensland region. Of these businesses 22,073 were small businesses (94.6 per cent of the total), 1,111 were medium businesses and 159 were large businesses. The number of small businesses within the region as a whole mirrors quite closely the small business economy which dominates the Queensland economy.

Given Cairns' role as a key service hub for the region it is not surprising the Cairns Local Government Area had the largest number of businesses (14,701).

BUILDING APPROVALS

Building approvals are a good indicator of confident investment and stability within a local economy. The construction industry in Tropical North Queensland suffered during the Global Financial Crisis with building approvals in the region falling from approximately 4,204 residential and non-residential building approvals in 2006-07 to approximately 2,009 approvals in 2009-10. As private sector investment remains quiet, construction activity in Tropical North Queensland is primarily being driven by public sector projects.

GRAPH 7. TROPICAL NORTH QUEENSLAND BUILDING APPROVALS 2002/2003 - 2009/2010



Source: Australian Bureau of Statistics, Building Approvals, Queensland, March 2011, cat. no. 8731.0. (QRSIS database maintained by the Office of Economic and Statistical Research).

TABLE 8. COUNTS OF REGISTERED BUSINESSES (a) BY EMPLOYMENT SIZE (b) BY LOCAL GOVERNMENT AREA, TROPICAL NORTH QUEENSLAND REGION, 2008-09

LOCAL GOVERNMENT AREA	EMPLOYMENT SIZE				SMALL BUSINESSES AS A % OF TOTAL
	SMALL	MEDIUM	LARGE	TOTAL	
	— NUMBER —				PERCENT (%)
Cairns (R)	13,939	666	96	14,701	94.8
Cassowary Coast (R)	3,304	192	27	3,523	93.8
Cook (S)	356	12	6	374	95.2
Tablelands (R)	4,474	241	30	4,745	94.3
Tropical North Queensland Region	22,073	1,111	159	23,343	94.6
Queensland	399,479	17,025	2,906	419,410	95.2
Region as % of Qld	5.5	6.5	5.5	5.6	..

S = Shire R = Regional Council .. = not applicable

(a) It is not currently possible to account for those businesses which operate out of multiple locations, other than at their main location. This is particularly relevant for larger businesses, which commonly establish outlets in numerous states and regions

(b) Businesses are defined as small (employing less than 20 people, including non-employing businesses), medium (employing 20 or more people but less than 100 people) and large (employing 100 or more persons).

Note: Based on ASGC 2010.

The sum of the Local Government areas may not be equivalent to the region total due to confidentialisation of the Local Government area data.

Data for Local Government areas (2010) are derived from concorded population-based statistical local area data (ASGC 2006).

Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, June 2007 to June 2009, cat no. 8165.0

DEFINITIONS:

- Small** – employing less than 20 people, including non-employing businesses
- Medium** – employing 20 or more people but less than 100 people
- Large** – employing 100 or more people



2031 Vision

The individuals and organisations which have contributed to the TNQREP share a powerful and inspiring vision for the region. They consider the vision ambitious but attainable, broad but eminently appropriate, subjective but capable of shaping and guiding the actions of those who subscribe to it and are motivated to bring it to reality.

Simple in its wording but complex and full of implications, this vision is that in 2031 Tropical North Queensland will be **The World's Leading Sustainable Tropical Region**.

By this time, Tropical North Queensland will be strongly associated with an enjoyable tropical lifestyle made possible by sustainable interaction between a beautiful natural environment and a strong economy. It will be known as a region where locals and visitors are living, working and playing in a tropical paradise.

Tropical North Queensland will be looked to as a model tropical region and will be known for the assistance and leadership it provides to such regions throughout the world.

Tropical North Queensland will be the first region to come to mind when people think about or discuss tropical issues regardless of where on the globe this discussion or thinking occurs.

Being recognised as the world's leading tropical region will be an important aspect of being the world's leading tropical region.

Most importantly, Tropical North Queensland will meet the needs of the present without compromising the ability of future generations to meet their own needs.

The TNQREP rests upon the assumption of this vision. The goals which the TNQREP identifies, the outcomes which it pursues, and the actions it suggests, have all been passed through the filter of this vision and are intended to assist or inform its pursuit.

The vision of Tropical North Queensland as the World's Leading Tropical Region has been distilled from wide-ranging community consultation. It is not a creation for the purposes of the TNQREP. Real and lasting commitment to this vision is within the grasp of the people of Tropical North Queensland. It is this commitment, in combination with the natural and built resources of the region and the talents, skills and personal qualities of its people who will drive the successful implementation of the TNQREP.

While the vision is rich with economic, environmental and social connotations, the focus of this plan is the implementation of economic strategies. The environmental and social dimensions of the vision are acknowledged and valued however other documents and plans will more fully address these elements.



Goals

Delivery of the vision to become 'The World's Leading Sustainable Tropical Region' is based upon three fundamental goals:

- **A strong and confident tropical economy**
- **An enriched lifestyle in liveable communities**
- **A natural and built tropical environment which is enjoyed, protected and enhanced**

These goals reflect a triple bottom line approach which is designed to produce long-term sustainable results. To be 'The World's Leading Sustainable Tropical Region', TNQ will need to excel equally at all three goals and the TNQREP framework acknowledges this inextricable connection.

A STRONG AND CONFIDENT TROPICAL ECONOMY

Economic strength comprises robustness – the ability to react quickly to changing market dynamics, and resilience – the ability to absorb market fluctuations. It encompasses both diversity between industries and also within them, ensuring there is adequate depth as well as breadth to the Tropical North Queensland economy. Economic strength also provides the momentum for sustainable economic growth through innovation and productivity improvements.

Economic confidence implies a willingness to take risks and financially invest in the region during unpredictable economic conditions. Economic confidence is characterised by economic self-belief, the generation of positive economic messages and the completion of iconic and symbolic projects that support economic growth.

A strong and confident economy has success magnetism whereby growth attracts investment which supports further growth and consequentially attracts further investment. The cyclical nature of success magnetism means that a strong and confident economy will move from strength to strength irrespective of the economic conditions.

A tropical economy is one that maximises its natural assets and the industries that this inspires capitalising on its tropical uniqueness.

A strong and confident tropical economy embraces social diversity and offers opportunities for all Tropical North Queensland residents to fully participate in the economy. This is characterised by equity and inclusivity throughout the workforce.

Finally, a strong and confident economy positively impacts the region's lifestyle and liveability attributes whilst also providing an opportunity to protect, enhance and enjoy the environment.

AN ENRICHED LIFESTYLE IN LIVEABLE COMMUNITIES

Future economic development will continue to enrich the lifestyles of people in the Tropical North Queensland region and improve liveability conditions in accordance with their expressed aspirations. It is a combination of lifestyle and liveability which retains residents and attracts others to the region's communities and influences them to permanently migrate to the region. Tropical North Queensland population growth is a desirable economic objective but above all else this goal ensures Tropical North Queensland maintains the quality of lifestyle and liveability which its residents currently cherish.

Enriching lifestyle is about maintaining and enhancing the range of living options available in Tropical North Queensland. In this region there are many choices from seaside to rainforest to farmland in cities, towns and remote locations. It means the people of Tropical North Queensland have choices regarding their living options and these choices are equally valued and respected in economic planning.

Liveability is internationally defined using criteria such as safety, education, health care, culture, environment, access to nature, recreation, political-economic stability, public transportation, international connectivity, climate, urban design, and business conditions. 'Liveable communities' means economic development will deliver improvements in these areas and Tropical North Queensland will invest in the 'liveability' characteristics of the region.

An enriched lifestyle in a liveable community also incorporates an element of affordability, whereby the people of Tropical North Queensland have the opportunity to make economic choices without needing to leave the region. A strong and confident economy will contribute positively to enhancing these choices on an individual level.

A NATURAL AND BUILT ENVIRONMENT WHICH IS ENJOYED, PROTECTED AND ENHANCED

A natural and built environment which is enjoyed, protected and enhanced means people are able to interact with and benefit from the Tropical North Queensland environment in a way which ensures the same privilege will be available to future generations.

Access to and the enjoyment of the environment significantly contributes to both economic success and enrichment of the community's lifestyle. The TNQREP preserves the right for the people of Tropical North Queensland to derive satisfaction from the environment and to utilise it as a resource, as long as these actions do not impact upon its sustainability.

The TNQREP will influence both strategic and operational policy throughout the TNQ region and all economic development actions must ensure either a positive or neutral net effect on the environment to gain endorsement. In this way, economic development will protect the unique natural assets of the region and contribute to their environmental and economic sustainability as established by the 2031 Far North Queensland land usage plan.

A strong and confident economy also provides opportunities to enhance the natural environment through ongoing resource management and restoration programs. Environmentally conscious economic development actions can aid the alignment of and interaction between our built and natural environments, positively influencing lifestyle and liveability aspects of the region.



Outcomes

The TNQREP has identified four outcomes that are integral to the achievement of a strong and confident economy:

- **Robust and resilient industries**
- **Thriving businesses**
- **Community confidence, connectedness and capacity**
- **Infrastructure which supports economic growth**

These outcomes articulate the target areas for economic development. These outcomes positively influence the economic goals and consequently the vision of the TNQREP.

ROBUST AND RESILIENT INDUSTRIES

Robust and resilient industries are characterised by their ability to weather and recover from adverse market forces and display spirit and dynamism during periods of fluctuation. Tropical North Queensland's industry sectors will be able to adapt to change resulting from legislation, environmental events, workforce evolution and external financial circumstances, and will be equipped for interaction with new stakeholders as part of their robust and resilient character.

To this end, Tropical North Queensland's industries will be progressive and future focused, up-taking innovation quickly and thereby imbedding resilience into their organisational structure.

Tropical North Queensland industries will complement one another with the interaction of their differing strengths and risks providing a more stable economic base. Greater crossover between industry sectors will also promote robustness as their economic engagement will help them to support each other in challenging economic times.

Industries for which Tropical North Queensland has a competitive advantage will be a particular focus in economic development and therefore affect the region's industry mix. This mix will continue to evolve and include combinations of existing and emerging industry sectors, thus ensuring regional strengths are capitalised upon.

THRIVING BUSINESSES

Thriving businesses are defined by prosperity and sustainable growth. The Tropical North Queensland economy will be characterised by large numbers of profitable businesses operating sustainably over long periods of time. The concept of thriving businesses encompasses the full trading spectrum from micro-enterprises through small and medium businesses to large companies. All forms are equally important to a strong and confident economy and the TNQREP advocates for this balance.

Tropical North Queensland businesses will be proactively engaged in economic development dialogue and connected to the wider business community through business organisations. Businesses will invest in themselves and pursue growth in accordance with the aspirations of their operators.

COMMUNITY CONFIDENCE, CONNECTEDNESS AND CAPACITY

Community confidence means the people of Tropical North Queensland have a sense of pride in the region and adopt a can-do attitude towards the economy. People will be pleased to associate themselves with Tropical North Queensland and perceive the region's economy to be the best in the tropical world. The confidence of the people in Tropical North Queensland communities will be evidenced by their positive outlook, their willingness to plan for the future and their attitude towards risk-taking.

Community connectedness in Tropical North Queensland will be characterised by unity under respected leadership, which both inspires and drives action. Community connectedness is largely intangible but can be perceived through high levels of engagement, collectivism and integration of the entire community into the economic picture including the engagement with and by both indigenous and non-indigenous people. As a connected community, the people of Tropical North Queensland will utilise networks and business organisations to further their own economic ventures.

Community and individual capacity takes the form of technical knowledge and skills. Tropical North Queensland people will feel empowered to recognise and act on economic opportunities. Communities will recognise and appreciate their role in the economic system and have a clear voice which they use to shape their circumstances. Community capacity means the people of Tropical North Queensland are both willing and able to take charge of their economic future, safe in the knowledge they themselves are the most valuable resource in the region.

INFRASTRUCTURE WHICH SUPPORTS ECONOMIC GROWTH.

Infrastructure that supports economic activity means the facilities, installations, networks and knowledge systems that support economic interaction and growth. The TNQREP considers transportation routes, communications systems and public institutions to be at the heart of the region's economic development and therefore essential to building a strong and confident economy.

Tropical North Queensland will benefit from infrastructure which expands rather than limits options for business. Infrastructure which enables economic activity will be widely accessible, practical and tailored to meet the needs of Tropical North Queensland's tropical economy and environment.



Action Plan 2011-2016 Overview

This action plan will shape the Tropical North Queensland economy through the first horizon, the near term of up to five years. It identifies and describes 10 key strategies which will drive economic activity in the direction of the commonly owned longer-term goals and vision.

The plan acknowledges building a strong and confident economy requires both growth and foundational strategies and these strategies need to build the capacity of the region including its human capital and innovativeness along with the traditional elements of infrastructure and funding. It adopts the approach of place-based regional development identifying and mobilising the region's endogenous potential through locally-owned strategies (Tomaney, 2010)

Each strategy consists of a series of actions with an identified lead agency. It is recognised the implementation of these actions will require the efforts of numerous partners and will be supported by the organisations who have endorsed the plan and others. It is envisaged the lead agency in conjunction with their partners will develop an implementation strategy for each action identifying critical steps, milestones and resources. This will provide a framework for monitoring and reporting progress annually.

It is inherent in the nature of integrated economic development that some actions contribute positively across several strategies, and some opportunities or issues are addressed by elements of various strategies. It is important therefore the suite of actions be viewed holistically and the linkages between strategies and actions be optimised.

Each of the actions has been mapped to the economic outcomes, providing a linkage between the five year and 20 year horizons. Robust and Resilient Industries (R&RI), Thriving Business (TB), Community Confidence Connectedness and Capacity (CCC), and Infrastructure which Supports Economic Growth (IE).

In determining which actions were appropriate for inclusion on the TNQREP action plan the following criteria were applied:

Does the proposed action:

- **Demonstrate benefit for the region as a whole, or is it strategically significant?**
- **Contribute to moving the regional economy forward and to the realisation of the vision and the goal of the TNQREP 2031?**
- **Have clear leadership and is it realistic and achievable?**
- **Demonstrate a clear return on investment (financial/capacity/confidence outcomes)?**
- **Encourage collaboration of stakeholders?**
- **Complement other strategies/plans where appropriate?**

Strategies 2011-2016

The Strategies which will provide the focus for the period 2011-2016 are:

GROWTH STRATEGIES			
Actively promote priority growth opportunities	Strengthen and diversify the region's tourism industry and destination appeal	Strengthen the primary production sector and build market opportunities	Strengthen the small business sector
PAGE 34	PAGE 38	PAGE 42	PAGE 44

FOUNDATION STRATEGIES					
Attract and enable industry and enterprise investment	Ensure optimal transport linkages to facilitate the movement of people and products to domestic and international markets	Position TNQ as a digital economy	Position the region as a leader in sustainable economic development	Develop the skills and capacity of the region's workforce now and into the future	Develop a confident and united region that projects positively and cohesively
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Actively promote priority growth opportunities

GROWTH STRATEGY: ACTIVELY PROMOTE PRIORITY GROWTH OPPORTUNITIES

PERFORMANCE MEASURES

- Increase in employment in targeted industries
- Increased contribution to GRP of targeted industries

INTENT

Tropical North Queensland is committed to building on our strengths and competitive advantages to maximise our economic potential and realise our vision of being the World's leading sustainable tropical region. Tropical North Queensland has prioritised our top growth industries and this strategy is focused on delivering support to these sectors. This strategy focuses on the diversification of the Tropical North Queensland economy and how TNQ can sustainably grow the industries for which we have a specialisation. A broad-based economy spreads the risks associated with a high Australian dollar, seasonal fluctuations and natural disasters. Diversification into the identified industries expands the employment opportunities in the region which consequently has a positive impact on skill levels and average income levels. These industries have been prioritised because they represent our natural competitive advantage; it is not that other industries are not valuable to the Tropical North Queensland economy but these are the sectors where the greatest overall impact can be made.

To support priority growth opportunities this strategy is focused on:

- Tropical Expertise
- Mining and the provision of services to the resources sector
- Marine
- Aviation
- Education
- Creative Industries



GROWTH STRATEGY	ACTIVELY PROMOTE PRIORITY GROWTH OPPORTUNITIES	LEAD PARTNER	TIMELINE	R&RI	TB	CCC	IE
Tropical Expertise	1.1 Increase the capacity of the tropical expertise sector to broaden the economic base by: a. Supporting synergies and collaboration between local experts in order to gain scale in the marketing and sale of tropical expertise. b. Showcasing and promoting the unique expertise of the region to position Tropical North Queensland as the world's leading tropical region.	Advance Cairns (Austropex) Troplinks	2011-2016				
Regional Airports	1.2 Support initiatives to increase the usage of the regional airports to enable growth in the aviation industry.	Local Governments					
Aviation Skills	1.3 Expand the facilities and services of the Cairns Aviation Skills Centre and increase the provision of aviation training across the region to increase qualified local aviation workforce thereby attracting new business.	CASC	2011-2016				
Aviation MR&O	1.4 Promote and encourage the growth of the aviation maintenance, repair and overhaul sector to achieve industry and enterprise growth.	AAGC	2011-2016				
Marine Education	1.5 Expand the facilities and services of the Great Barrier Reef International Marine Training College to increase the qualified, local, marine workforce and attract new business, by: a. Establishing The Australian Marine Engineering Institute (AMEI), a Centre of Excellence for marine engineering. b. Providing emergency helicopter training (BOSIT) to the offshore marine industry. c. Providing specialised training for the tug and towage industry.	GBRIMC	2011-2013				
Marine infrastructure	1.6 Seek the commitment of the local, state and federal governments and Ports North to: a. Undertake an assessment of the Cairns Marine Industry to identify industry capability, opportunities for growth, business constraints and infrastructure needs. b. Provide funding for new infrastructure needs of the marine industry to enable new business markets to be developed.	Advance Cairns	2011-12				

Actively promote priority growth opportunities

GROWTH STRATEGY	ACTIVELY PROMOTE PRIORITY GROWTH OPPORTUNITIES	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
Marine - Super Yachts	<p>1.7 Implement strategies to position the region as the super yacht hub for the South Pacific, thereby increasing the business opportunities to grow service based industries and enterprises including:</p> <p>a. Establish and maintain networks within the South Pacific and internationally, and undertake visitations as opportunities arise.</p> <p>a. Gather and share market intelligence of super yacht vessels; encourage alliance between the major slipways and SYGGBR members and support local business in the development and growth of the super yacht industry.</p> <p>c. Collaborate with other cluster groups within Queensland to advocate legislative changes to reduce visitation/charter barriers.</p> <p>d. Foster long term partnerships and cooperation from super yacht destinations within the South Pacific to increase cruising within the entire region.</p>	Great Barrier Reef Super Yachts Group	<p>2011-2016</p> <p>2011-2016</p> <p>2011-2016</p> <p>2013-2016</p>				
Infrastructure	1.8 Progress the implementation of the Cairns Entertainment Precinct to provide a world class facility for the use of the regional community and visitors thereby increasing economic and social opportunities .	Cairns Regional Council	2011-2016				
Creative Industries	1.9 Through collaborative partnerships, develop and implement strategies to increase the prosperity of creative industry organisations and workers to deliver industry growth.	Arts Nexus	2011-2016				
Creative Industry (Indigenous)	1.10 Strengthen initiatives that promote Indigenous arts and artisans (eg. Cairns Indigenous Arts Fair) to increase the prosperity and profile of Indigenous creative industries throughout the region.	Arts Qld/ CRC	2011-2016				
Resource Sector	1.11 Proactively engage with the resources sector to promote the region as a preferred supply hub thereby creating demand for local products and services.	Cairns Chamber of Commerce Resource & Industrial Taskforce	2011-2016				

GROWTH STRATEGY	ACTIVELY PROMOTE PRIORITY GROWTH OPPORTUNITIES	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
PNG	1.12.1 Proactively engage with regional business to support initiatives that promote the region and position it as a supply and training hub for PNG thereby creating demand for local products and services.	DEEDI					
	1.12.2 Coordinate advocacy for specific initiatives that develop TNQ relationships and opportunities with PNG including, but not limited to: a. Establishment of a PNG Customs Clearance Facility in Cairns for PNG bound cargo. b. Establishment of PNG Consular office in Cairns and a PNG processing centre in Cairns for PNG bound travellers. c. Continuation of the Queensland Government PNG Trade Representative Position.	Advance Cairns					
	1.12.3 Undertake research to support PNG economic development and to identify opportunities for TNQ.	The Cairns Institute					
Education	1.13.1 Through stakeholder collaboration undertake activities to position the region as a preferred destination for international students thereby increasing export dollars in the regional economy.	Study Cairns	2011-2016				
	1.13.2 Develop an updated capability profile for the education sector to promote the diverse product and services offering available.		2011-2012				
Industry group development	1.14 Support emerging and existing industry cluster groups and enable them to be the key leaders of industry based growth strategies, which align with the overarching vision of the TNQREP.	Advance Cairns	2011-2016				

Strengthen and diversify the region's tourism industry and destination appeal

GROWTH STRATEGY: STRENGTHEN AND DIVERSIFY THE REGION'S TOURISM INDUSTRY AND DESTINATION APPEAL

PERFORMANCE MEASURES

- Increased visitor nights
- Increased visitor expenditure
- Number and nature of additional experiences established
- Number of additional markets established
- Increased aviation capacity

INTENT

Tourism is a vital industry in Tropical North Queensland. It is a core component of the Tropical North Queensland economy and the region has had a long and successful history in this sector. Tourism has built on our natural assets and our tropical location to create a globally unique competitive advantage and the sector has the potential to sustain continued growth. As a regional tourism destination we are able to build on the information and initiatives provided by State and National bodies and utilise these to accentuate our destination appeal.

The strengthening and diversification of the region's tourism industry will build on our region's strengths whilst also providing many flow-on benefits to other industry sectors.

In 2010, tourism brought \$2.2 billion export dollars into our region whilst directly employing approximately 19,000 Tropical North Queensland residents.

To strengthen and diversify the region's tourism industry this strategy is focused on:

- Building on and extending the range of experiences
- Building industry capacity and implementing soft and hard infrastructure
- Destination marketing



GROWTH STRATEGY	STRENGTHEN AND DIVERSIFY THE REGION'S TOURISM INDUSTRY AND DESTINATION APPEAL	LEAD PARTNER	TIMELINE	R&RI	TB	CCC	IE
Increasing domestic and international visitation	2.1.1 Implement the strategies described in the 2011-2015 TTNQ strategic marketing plan to meet specified targets in the growth of international and domestic visitor market share and increased visitor expenditure.	TTNQ	2011-2015				
	2.1.2 Undertake business development activities to increase the numbers of international and domestic passengers accessing Cairns Airport.	Cairns Airport					
	2.1.3 Lead advocacy on funding and policy issues that impact regional visitor numbers.	TTNQ/Advance Cairns					
Experience diversification - Strategic projects	Increase the region's capacity and experiences in the areas of: <ul style="list-style-type: none"> • Eco and nature-based tourism • Sports and events tourism • Health and wellness tourism • Education and study tours • Indigenous cultural and heritage tourism • Business, convention and incentive markets This will be done by:		2011-2015				
	2.2.1 Providing regulatory frameworks and processes which facilitate the establishment of experiences which support the vision and goals of the TNQREP.	Local Governments					
	2.2.2 Advocating for government funding support to meet the infrastructure needs of experiences which support the vision and goals of the TNQREP.	Advance Cairns/TTNQ					
	2.2.3 Advocating for policy and regulatory frameworks which facilitate experience diversification which is aligned to the vision and goals of the TNQREP.	Advance Cairns/TTNQ					
	2.2.4 Conducting marketing activities to promote the region's capacity and experiences in the identified areas.	TTNQ					
Experience diversification - Sport	Position Tropical North Queensland as a pre-eminent tropical centre for elite sports training, research and medical facilities by:		2011-2016				
	2.3.1 Preparing and presenting plans for the expansion of sports infrastructure.	Local Governments					
	2.3.2 Advocating for the public and private investment required to realise these plans.	Advance Cairns/TTNQ					
	2.3.3 Conducting marketing activities to promote the region as a tropical sports destination.	TTNQ					

Strengthen and diversify the region's tourism industry and destination appeal

GROWTH STRATEGY	STRENGTHEN AND DIVERSIFY THE REGION'S TOURISM INDUSTRY AND DESTINATION APPEAL	LEAD PARTNER	TIMELINE	R&RI	TB	CCC	IE
Experience diversification – Cruise industry	2.4.1 Develop a Cruise Shipping Industry Development Strategy to expand the cruise shipping opportunities out of the Port of Cairns.	Ports North	2011-2013				
	2.4.2 Advocate for the development and funding of key infrastructure, including channel dredging, to allow the implementation of the Cruise Shipping Industry Development Strategy.	Advance Cairns					
	2.4.3 Develop and implement a marketing strategy for the attraction of new cruise shipping to the Port of Cairns.	TTNQ					
Experience diversification – Events	2.5 Develop and implement events strategies across the region including collaboration on major events that impact multiple Local Government areas e.g. the 2012 solar eclipse.	Local Governments	2011-2013				
Experience diversification – Drive tourism	2.6.1 Strengthen the regional tourism strategy and infrastructure framework including supporting the 'Drive North Queensland' strategy and capitalising on information opportunities afforded by new technologies.	FNQROC/CRC	2011-2012				
	2.6.2 Foster regional collaboration in the presentation of experiences to a range of visitor markets.	TTNQ/LTO	2011-2015				
Experience diversification – Community projects	2.7 Provide support to community organisations with regionally significant projects that contribute to experience diversity and vitality (eg. Tablelands Integrated Mountain Biking Alliance).	Local Governments	2011-2014				
Experience profile	2.8 Document a profile which captures the scope and capacity of the region's experiences and sectors to inform marketing and industry development activities including advocacy.	TTNQ/LTO	2011-2013				
Research	2.9.1 Undertake and utilise research on Tropical North Queensland customer behaviour and satisfaction to ensure consistently high levels of visitor approval and referral.	JCU	2011-2015				
	2.9.2 Undertake and utilise research to ensure continuous improvement in sustaining our natural assets.	RRRC					
Destination marketing	2.10 Advocate for greater community and business investment in regional tourism marketing.	TTNQ	2011-2015				



Strengthen the primary production sector and build market opportunities

GROWTH STRATEGY: STRENGTHEN THE PRIMARY PRODUCTION SECTOR AND BUILD MARKET OPPORTUNITIES

PERFORMANCE MEASURES

- Increased value of agricultural contribution to GRP
- Establishment of identified new markets
- Bio-fuel industry growth
- Identified value add products in the market

INTENT

Agriculture is a major industry in the Tropical North Queensland region and its future contribution has been protected within the regional land usage plan, Far North Queensland 2031. In all its forms agriculture contributes significantly to regional domestic product and employment.

The Tropical North Queensland region boasts natural resources conducive to a strong and growing tropical agriculture industry including land, water supply and appropriate climate. As domestic and international demand for food production increases the region is well positioned to expand and capitalise on this trend. Expertise in tropical agriculture has resulted in productivity improvements, sustainable practices and added an internationally saleable service.

Agriculture is part of the lifestyle appeal of the region and it provides economic opportunity outside metropolitan areas. Agriculture is also vital to our region's food security and contributes to our sustainability by reducing our food miles.

To strengthen and diversify the region's agriculture industry this strategy focuses on:

- Increasing food production capability including food security and quality of production
- Diversifying through innovation and value add opportunities
- Addressing barriers to industry and enterprise development



GROWTH STRATEGY	STRENGTHEN THE AGRICULTURAL SECTOR AND BUILD MARKET OPPORTUNITIES	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
Food supply chain	3.1 Build the capacity of the Regional Food Network to lead initiatives to enhance supply chain efficiency and demand creation for local food.	Advance Cairns	2011-2012				
Innovation	3.2.1 Engage with peak agricultural bodies to target and support agricultural innovations.	DEEDI	2011-2016				
	3.2.2 Identify and support opportunities to showcase expertise or innovation in tropical agriculture.	Austropex					
Bio Mass	3.3 Support the growth of the bio-based industrial sector by establishing bio-based industrial zones in strategic regional locations.	DEEDI	2011-2013				
Grass fed beef accreditation	3.4 Implement an accreditation system for grass-fed beef to promote the competitive advantage of the region's pastoral industry.	Ag Force	2011-2012				
Meat processing	3.5 Investigate the potential for a meat processing facility in the region to provide both market and employment opportunities.	DEEDI	2011-2012				
Industry resilience	3.6 Seek structured investment in industry planning for resilience across the Agriculture sector.	DEEDI	2011-2016				
State government policy	3.7 Encourage growers and industry groups to capitalise on the opportunities associated with the Queensland Government's policy 'Food for a growing economy'.	DEEDI	2011-2016				
Diversification	3.8 Support diversification initiatives that provide alternative income streams for primary producers (eg. agri-tourism, organic production and other niche markets).	DEEDI	2011-2016				
Research and extension	3.9 Promote research and extension that contributes to productivity increases in regional agricultural industries.	DEEDI	2011-2016				
Food security	3.10 Support initiatives which protect the region's primary products from bio-security threats.	DEEDI	2011-2016				
Expertise retention	3.11 Support initiatives which encourage the retention of expertise and industry and enterprise succession planning.	Industry Groups	2011-2016				
Regulatory impacts	3.12 Identify regulatory barriers to industry development and determine options for streamlining these processes.	Industry Groups	2011-2016				
Fresh product export	3.13 Encourage initiatives which facilitate the export of regional fresh produce to diversify the market for the region's produce and build industry resilience.	Growcom	2011-2016				

Strengthen the small business sector

GROWTH STRATEGY: STRENGTHEN THE SMALL BUSINESS SECTOR

PERFORMANCE MEASURES

- Reduced unemployment rates
- Increase in number of people employed in the region
- Positive changes in CCIQ/NAB quarterly business confidence survey reports
- Positive changes in Local Government annual business confidence survey
- Reduction in number of business foreclosures and administrators appointed

INTENT

The TNQ economy is underpinned by micro and small businesses. A significant cohort draw their inspiration from our tropical location and lifestyle and all add to the fabric of our community both economically and socially. These businesses are integral to the economy and a major employer. To ensure the longevity and profitability of these businesses Tropical North Queensland needs to build their capacity, their confidence and connectedness.

To strengthen the small business sector this strategy focuses on:

- Providing support to build the capacity connectedness and confidence of small business owners
- Overcoming the barriers to industry and enterprise growth and profitability



GROWTH STRATEGY	STRENGTHEN THE SMALL BUSINESS SECTOR	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
Provision of business support	4.1 Provide cost effective business support services to small businesses across the region including programs which increase the capability and professionalism of business owners and managers.	DEEDI/Advance Cairns BEC	2011-2013				
Service provision mapping	4.2 Undertake an audit of current business development service provision to: <ul style="list-style-type: none"> • Identify the gaps and potential efficiencies in delivery. • Provide information and direction to businesses seeking assistance. 	DEEDI Advance Cairns BEC	2011-2012				
Red tape reduction	4.3 Actively campaign for the streamlining of government regulations and processes which inhibit business activity.	CCIQ	2011-2016				
Support for business groups	4.4 Provide support and assistance to aid the development and growth of community based business groups across the region.	CCIQ CCoC	2011-2016				
Indigenous enterprises	4.5.1 Encourage and support the establishment and growth of indigenous enterprises. 4.5.2 Provide workshops, professional business support services and business loans to assist Indigenous people to succeed in business.	DEEDI IBA	2011-2016				
Tropical expertise	4.6 Develop the capacity of and promote to national and international markets, regional businesses which feature tropical expertise, thereby increasing the viability of these businesses and positioning the region as a key supplier of tropical knowledge.	DEEDI Advance Cairns (Austropex)	2011-2016				
New businesses	4.7 Identify and encourage business opportunities which are financially linked through the supply chain to successful industries and contribute to the realisation of the TNQREP vision and goals.	DEEDI	2011-2016				
E commerce	4.8 Encourage the use of the broadband network by the small business sector to provide connectivity, alternative markets and ecommerce opportunities.	FNQROC	2011-2016				
Business incubator	3.9 Investigate the potential for a business incubator or other mechanisms which support the establishment of small and micro businesses.	Advance Cairns BEC	2011-2013				

Attract and enable industry and enterprise investment

FOUNDATION STRATEGY: ATTRACT AND ENABLE INDUSTRY AND ENTERPRISE INVESTMENT

PERFORMANCE MEASURES

- Net increase in business registrations
- Increase in number and value of building approvals
- Identified new investments in priority growth sectors
- Identified instances of global/national firms or government departments relocating to this region

INTENT

Investment is critical to economic growth. Investment enables innovation to reach the marketplace, which in turn has a positive impact on employment and gross regional product and produces a boost to economic confidence. A positive investment climate creates an economic culture which benefits the entire region, not just investors and investees.

Attracting investment is about convincing others to join us in success and to view Tropical North Queensland as a favourable investment option. In addition to traditional private sector investment. This strategy includes increasing government business, public-private investment partnerships and philanthropic or angel funding for projects in the Tropical North Queensland region. Increased investment in the region would have a positive effect on the gross regional product and therefore it is a critical strategy for economic development.

One specific element required to build a successful investment environment is inspiring innovation. Encouraging innovation means finding new and better ways of doing things. This might be new products or services, new business models or even new mechanisms to enable business interaction. As a strategy, encouraging innovation has multiple layers.

The first layer is about creating an environment for the Tropical North Queensland economy to be innovative. The second layer is about capturing, publicising and celebrating our innovative talents. The third and most important layer is about the commercialisation of TNQ innovations which will benefit the whole economy.

To attract and enable industry and enterprise investment this strategy is focused on:

- Attracting investors
- Attracting new & innovative businesses
- Building the capacity of investees to be investor ready
- Attracting multinational headquarters to be based in the region
- Attracting government departments and offices
- Supporting innovation



FOUNDATION STRATEGY	ATTRACT AND ENABLE INDUSTRY AND ENTERPRISE INVESTMENT	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
Commercial investment	5.1 Engage with companies aligned to the visions and goals of the TNQREP interested in establishing headquarters or regional offices in the area and prepare packages and proposals to meet their needs.	Advance Cairns	2011-2016				
Government regionalisation	5.2 Develop and implement a targeted strategy to attract the key government agencies identified as aligned with the region's competitive advantages eg. Austrade, Ausaid, Office of Northern Australia, Department of Environment and Resource Management (DERM).	Advance Cairns	2011-2013				
Investment incentives	5.3 Engage with Local, State and Federal governments to develop TNQ focused investment programs to promote the region and provide incentives to attract new businesses.	Advance Cairns	2011-2013 2011-2016				
Defence	5.4 Actively campaign for the expansion of defence facilities and an increase in defence personnel within the region including: a. Prepare a submission to the Defence Force Posture Review showcasing the region's potential. b. Identify and pursue short term defence support opportunities.	RDAFNQ&TS Advance Cairns	2011-2014 2011-2012				
FIFO	5.5 Implement a FIFO worker coordination strategy to: a. Market the region as a point of hire to resource companies and as a lifestyle location for skilled workers. b. Create employment and training opportunities for TNQ residents.	Advance Cairns/ Skills DMC	2011-2013				
Tropical expertise	5.6 Establish a regional investment leadership group to provide a strategic approach to regional investment attraction including: a. Develop, in conjunction with Local Governments and industry bodies, business cases to attract funding for new and innovative businesses and industries across the region. b. Support the establishment of a chapter of Angel Investors to assist emerging business opportunities. c. Investigate the potential for the establishment of regional investment superannuation funds as a source of investment capital. d. Support initiatives of current investors to increase their investment in the region, in alignment with the vision of the TNQREP.	Advance Cairns	2011-2012				

Attract and enable industry and enterprise investment

FOUNDATION STRATEGY	ATTRACT AND ENABLE INDUSTRY AND ENTERPRISE INVESTMENT	LEAD PARTNER	TIMELINE	R&RI	TB	CCC	IE
Commercial destination	5.7 Drive forward marketing strategies to promote the region as a commercial destination, a region which has serious business and investment opportunities, not just a spectacular natural environment and lifestyle.	Advance Cairns	2011-2013				
Lifestyle destination marketing	5.8 Drive forward marketing strategies to promote the region as a lifestyle destination thereby attracting personal investment and economic growth by: <ul style="list-style-type: none"> a. Working with major employers and the recruitment industry to encourage skilled workers to the region. b. Proactively marketing the region as a lifestyle destination and encouraging relocation (eg Evocities). c. Developing strategies to target visitors to the region encouraging them to relocate (come for a holiday/ visit/ conference/ sporting event - stay for lifetime). 	Advance Cairns	2011-2015				
Government policy	5.9 Advocate for financial incentives and government policies which encourage people to reside in the region's rural and remote areas.	Advance Cairns	2011-2015				
Planning processes	5.10 Streamline approvals processes within State and Local Government planning mechanisms and regulations and promote this to make investment attractive.	Local Governments DLG&P	2011-2016				
Land tenure	5.11 Work with stakeholders and government agencies to effect policy and process changes which will resolve various land tenure issues on Cape York Peninsula and across the Gulf of Carpentaria to enable businesses and industry to grow.	CYSF GSD	2011-2016				
Innovation	5.12 Support innovation and entrepreneurship in the region by: <ul style="list-style-type: none"> a. Producing knowledge and research. b. Supporting the development and strengthening of networks across the research, industry, government and businesses sectors. c. Assisting new, emerging and existing entrepreneurs to share experiences and mentor new and emerging innovative businesses. 	The Cairns Institute	2011-2016				
	5.13 Encourage and support innovative products and services poised for commercialisation.	Ausindustry					
	5.14 Continue to grow and develop the Tropical Innovation Awards.	Cairns Regional Council					
Research	5.15 Undertake research in order to better understand the functioning of the regional economy and communicate the results to foster improved business and industry capacity.	The Cairns Institute	2011-2016				



Ensure optimal transport linkages to facilitate the movement of people and product to domestic and international markets

FOUNDATION STRATEGY: ENSURE OPTIMAL TRANSPORT LINKAGES TO FACILITATE THE MOVEMENT OF PEOPLE AND PRODUCT TO DOMESTIC AND INTERNATIONAL MARKETS

PERFORMANCE MEASURES

- Decrease in number of days per year without road access to Brisbane
- Increase in tonnages shipped from region's ports
- Increase in value of regional exports
- Increased efficiency in primary product transportation (time reductions from farm to market or increased capacity)

INTENT

Tropical North Queensland will benefit from greater access to trade markets because this will enable an increase in regional exports. The net export formula is used to calculate the value of products leaving the region minus the value of products being brought into the region. Ideally, this sum is positive and this strategy aims to boost the total figure in order to influence the gross regional product. Improved transport linkages also

enable people and imports to move with greater ease within the region which will also positively impact the TNQ economy.

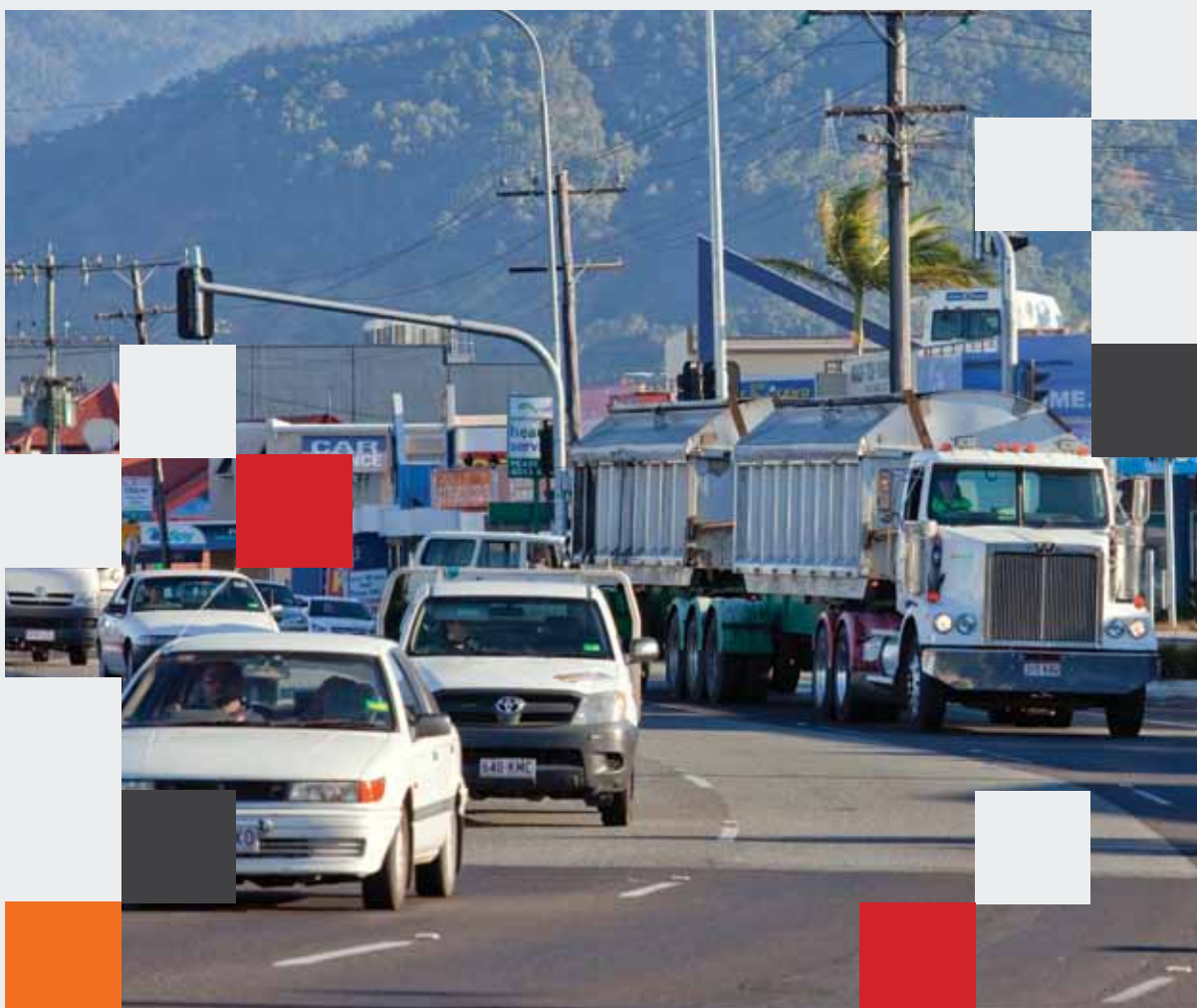
To provide optimal transport linkages to southern and international export markets this strategy focuses on all modes of transport road, rail, sea and air and the provision of the appropriate infrastructure.



FOUNDATION STRATEGY	ENSURE OPTIMAL TRANSPORT LINKAGES TO FACILITATE THE MOVEMENT OF PEOPLE AND PRODUCT TO DOMESTIC AND INTERNATIONAL MARKETS	LEAD PARTNER	TIMELINE	R&RI	TB	CCC	IE
Road linkages	Provide road linkages for the safe and efficient movement of people and goods across the region and to and from other places by:						
	6.1.1 Providing input through advocacy and structured businesses cases that highlight the economic imperatives associated with key road infrastructure including the Bruce Highway, the Hann Highway, the Peninsula Development Road and the Kuranda Range Road to State and Federal Government planning and budgeting.	Advance Cairns	2011-2014				
	6.1.2 Implementing the Bruce Highway Upgrade Strategy to increase the safety and resilience of the region's most important road link.	DTMR	Ongoing				
	6.1.3 Continuing with the sealing of the Peninsula Development Road.						
	6.1.4 Improving the inland connection via the Kennedy and Gregory Development Roads to ensure access to emerging consumer market opportunities.						
	6.1.5 Improving freight efficient vehicle routes (B-Doubles, Type 1 Road Trains and Type 2 Road Trains) and expand the network where warranted for safe and efficient movement of goods.						
	6.1.6 Preparing an upgrade strategy for the Kuranda Range Road to improve safety, slope stability, emergency management capability and efficient traffic flows.						
	6.1.7 Actively engaging with DTMR as a key stakeholder in the development of the Far North Queensland Integrated Regional Transport Plan and the Cape York and Torres Strait Islands Integrated Transport Network Plan.	TNQREP partners	2012-2013				
	6.1.8 Supporting regional and industry bodies representing neighbouring areas (eg. Gulf of Carpentaria & Cape York Peninsula) in their attempts to secure transport linkages into and through our region.						
Shipping services	6.2.1 Undertake business development activities to attract international and domestic shipping services through the Ports of Cairns and Mourilyan.	Ports North	2011-2016				
	6.2.2 Advocate for funding for key infrastructure, and where appropriate, incentives to attract new shipping services to the Ports of Cairns and Mourilyan.	Advance Cairns					

Ensure optimal transport linkages to facilitate the movement of people and product to domestic and international markets

FOUNDATION STRATEGY	ENSURE OPTIMAL TRANSPORT LINKAGES TO FACILITATE THE MOVEMENT OF PEOPLE AND PRODUCT TO DOMESTIC AND INTERNATIONAL MARKETS	LEAD PARTNER	TIMELINE	R&RI	TB	CCC	IE
Expansion of port facilities	6.3.1 Undertake the staged development of the Port of Mourilyan as an export hub.	Ports North	2011-2016				
	6.3.2 Support and advocate for the development of the Port of Mourilyan and the establishment of transport links to the Port.	Advance Cairns					
Intra region access	6.4 Actively promote initiatives designed to enhance public transport and intra-regional access (e.g. Cairns Transit Network Plan).	DTMR Local Governments	2011-2016				







Position TNQ as a digital economy

FOUNDATION STRATEGY: POSITION TNQ AS A DIGITAL ECONOMY

PERFORMANCE MEASURES

- Increased number of residents connected to the internet
- Progress towards High Speed Broadband available to 95% of region's population
- Identified innovations and businesses established using digital technology

INTENT

A sophisticated digital economy has been shown to contribute to economic prosperity. In particular, high-speed broadband access is a demonstrated economic accelerator. Digital technologies will create opportunities to overcome issues of remoteness and will enhance the delivery of education, the provision of health and financial services and the facilitation of trade throughout the region. A fully-integrated digital economy is the future for Tropical North Queensland and this strategy ensures the transition is made sooner rather than later.

To position Tropical North Queensland as a digital economy this strategy is focused on:

- Attracting early roll out of high speed broadband
- Enhancing the capacity of the business community to effectively utilise high speed broadband
- Strengthening the capacity of the region's ICT sector

FOUNDATION STRATEGY	POSITION TNQ AS A DIGITAL ECONOMY	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
Digital infrastructure	7.1.1 Position Tropical North Queensland as a location for early rollout of high speed broadband across the region including rural and remote areas.	FNQROC	2011-2013				
	7.1.2 Lead engagement with TNQREP partners to ensure ongoing collaboration and advocacy.		2011-2013				
Strategy development	7.2 Finalise the Digital Economy Strategy.	FNQROC	2011				
Industry group development	7.3 Develop an ICT industry group with the ability to advocate for the industry's needs and to identify opportunities for worker attraction and development and business/ industry growth.	Advance Cairns	2011-2012				
Business development	7.4 Engage with the business sector and the wider community to empower them to capitalise on the opportunities provided by high speed broadband.	FNQROC	2011-2016				

Position the region as a leader in sustainable economic development

FOUNDATION STRATEGY: POSITION THE REGION AS A LEADER IN SUSTAINABLE ECONOMIC DEVELOPMENT

PERFORMANCE MEASURES

- To be defined as part of the action plan

INTENT

Sustainability is core to the TNQREP, it is inherent in the vision, the triple bottom line goals and permeates all aspects of our economic future. This plan recognises that economic growth is important but must be done without risking the future of our next generation. TNQ aspires to a strong and confident economy but will not pursue 'growth for the sake of growth'; therefore our economic development must be done within the limits of sustainability. Ideally, the sustainability agenda will become integrated into all economic development overtime.

In the first five years one of the key sustainability focus areas will be energy. Economic success in Tropical North Queensland requires reliable energy supply that is distributed across the region effectively, efficiently and with equity. Energy security is essential to economic development and this strategy ensures the region has enough energy to meet both its current needs but also fulfil future demands created by economic growth. Tropical North Queensland is seeking a future where the region is energy independent and not affected by external cost or supply issues.

To drive a sustainability agenda and position TNQ as a leading region this strategy focuses on:

- **Developing a common and agreed understanding of sustainability**
- **Establishing agreed sustainability targets, measurement mechanisms and reporting framework**
- **Integrating positive practices into all aspects of the economy**
- **Developing business cases to increase investment in renewable energy**
- **Building resilience of energy supply**
- **Utilising natural assets of wind and solar to increase amount of renewable energy**



FOUNDATION STRATEGY	POSITION THE REGION AS A LEADER IN SUSTAINABLE ECONOMIC DEVELOPMENT	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
Sustainability leadership	8.1 Identify an organisation which can be resourced to function as the region's sustainability driver undertaking initiatives including: <ul style="list-style-type: none"> a. Establishing agreed sustainability targets, measurement mechanisms and reporting frameworks for the region to benchmark and articulate its progress. b. Maintaining and promoting a mapping of existing and potential sustainability initiatives that contribute to the achievement of the TNQREP vision and goals. c. Identifying and developing strategies to encourage new businesses and industries with environmentally sustainable practices and products to locate in the region. 	Advance Cairns	2011-2012				
Strategy development	8.2 Develop a Regional Energy strategy	DEEDI	2011-2012				
Renewable industry group develop	8.3 Establish and support a renewable energy industry group to: <ul style="list-style-type: none"> a. Assist in the development of a streamlined and efficient planning and approvals process that encourages the realisation of existing investments and promotes the region as attractive for future investments. b. Engage with the Office of Clean Energy to develop the business case for the allocation of Community Service Obligation funds to the development of regional renewable generation options. 	Advance Cairns	2011-2012				
Carbon Tax	8.4 Undertake an assessment of the impact of the carbon tax on medium to large businesses in the region and develop an action plan.	DEEDI	2011-2013				
Business incentives	8.5 Develop and implement incentives and support mechanisms for businesses and industries striving towards sustainability targets and compliance frameworks.	DEEDI	2011-2013				
Green build	8.6 Promote tropical green build principles and capability across the region.	Tropical Green Building Network	2011-2016				

Develop the skills and capacity of the region's workforce now and into the future

FOUNDATION STRATEGY: DEVELOP THE SKILLS AND CAPACITY OF THE REGION'S WORKFORCE NOW AND INTO THE FUTURE

PERFORMANCE MEASURES

- Increase in proportion of the population with higher qualification levels and in higher skill occupations
- Higher employment participation levels

INTENT

The Tropical North Queensland region needs to have a future-focused workforce to power the growth of our existing industries and to facilitate new economic ventures. Ensuring the supply and the capacity of the region's human capital must be a priority.

A skilled workforce is an important resource to building a powerful economy. Developing knowledge and skills means giving the people of TNQ opportunities to access high quality education and training whilst also fostering a culture of life-long learning.

Skilled migration is also both desirable and necessary to address some of Tropical North Queensland's workforce gaps and, more generally, to increase the population. Skilled migrants are also likely to bring new economic ventures to the region and pass on their knowledge and experience to long-term TNQ residents which will have a positive economic effect.

Proactively predicting and understanding Tropical North Queensland's workforce needs is at the core of this strategy. In particular, successful investment in the human capital of the region will build pathways for youth to stay in the region and close the gap for Indigenous job seekers.

To develop the skills and capacity of the region's workforce now and to meet our future needs this strategy focuses on:

- Workforce planning
- Skill development
- Attracting and retaining skilled workers



FOUNDATION STRATEGY	DEVELOP THE SKILLS AND CAPACITY OF THE REGION'S WORKFORCE NOW AND INTO THE FUTURE	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
Workforce planning	9.1.1 Collaborate with Skills Alliances to undertake research and industry consultation to understand future skills needs.	DET	2011-2016				
	9.1.2 Coordinate and support industry leaders' groups to identify and address the challenges faced by industry and employers in accessing appropriate skills.	Advance Cairns SFS / Tablelands Industry Working Group	2011-2013				
Partner linkages	9.2 Co-ordinate and lead strong and productive links between education and training providers, employment service providers and industry to: <ul style="list-style-type: none"> a. Capitalise on skill development funding opportunities. b. Facilitate programs that provide an effective transition from unemployment to employment. c. Pre-empt industry skill shortages and prepare the workforce for future trends. 	QITE/ LEC	2011-2013				
Regional migration program	9.3 Advocate for the expansion of the Regional Migration programs with a focus on local solutions across a broad range of industries.	Cairns Chamber of Commerce	2011-2014				
Tertiary education	9.4 Secure funding to establish the Australian Institute for Tropical Health and Medicine.	JCU	2011-2014				
Tertiary education	9.5 Continue to drive initiatives which increase the capacity of James Cook University including the construction of on-campus student accommodation.	JCU	2011-2014				
Indigenous skills	9.6 Coordinate and lead stakeholders to pursue initiatives that provide employment opportunities through skill development for the regions indigenous population.	QITE	2011-2016				
Creative industries	9.7 Establish and initially facilitate stakeholder groups to pursue strategies for building the business and employment capacity of priority growth areas.	Local Employment Coordinator	2011-2014				
Education pathways	9.8 Support initiatives that build partnerships between the education sector, business and industry and provide vocational pathways for students.	TNQ REP Partners					
Sustainable vision	9.9 Education providers to include sustainability training in their programs.	Education Providers					
Retention of skilled migrants	9.10 Provide programs that encourage the retention of skilled migrants.	Local Government					

Develop a confident and united region that projects positively and cohesively

FOUNDATION STRATEGY: DEVELOP A CONFIDENT AND UNITED REGION THAT PROJECTS POSITIVELY AND COHESIVELY

PERFORMANCE MEASURES

- Increase in proportion of the population with higher qualification levels and in higher skill occupations
- Higher employment participation levels

INTENT

Economic growth requires a positive business and investment culture. Working together, Tropical North Queensland's economic partners need to pursue the commonly endorsed vision and goals and dedicate resources, energy and expertise to achieving it. By capitalising on our 'tropical' competitive advantage and building on our successes and strengths the region can develop and project positivity and cohesion.

A confident and united region enables successful government lobbying and inspires economic interest in our region. Influencing government policy requires Tropical North Queensland to have a unified voice which carries the authority of the region. Tropical North Queensland will deliver clear, well-researched and convincing messages that are direct and tailored to meet the government's needs. Most importantly, these messages sell the region in a way that is irresistible to government and influences their decisions regarding the region.

To develop a confident and united region that projects positively and cohesively this strategy focuses on:

- Implementation of the TNQREP
- Adoption of a regional identity
- Promoting the positive relationship between the region's economic development agencies, business and industry groups, and government
- Confidence Building Campaign



FOUNDATION STRATEGY	DEVELOP A CONFIDENT AND UNITED REGION THAT PROJECTS POSITIVELY AND COHESIVELY	LEAD PARTNER	TIMELINE				
				R&RI	TB	CCC	IE
TNQREP implementation	<p>10.1 Provide leadership, management, reporting and regular communication associated with delivering the outcomes from the TNQREP including:</p> <p>a. Representing the TNQREP partners and coordinating advocacy as required on their behalf.</p> <p>b. Convening an annual regional economic forum to update partners, stakeholders and community on key initiatives and to address road blocks. These forums should also provide an opportunity for the progress of the TNQREP to be monitored, reported and celebrated.</p> <p>c. Develop formal relationships with providers of key economic data to ensure availability of accurate economic information.</p> <p>d. Providing a portal for relevant regional economic reports and data.</p>	Advance Cairns	2011-2016 annually				
One Voice	<p>10.2 Facilitate a process whereby regional economic issues, opportunities or projects can be negotiated by stakeholders and partners in preparation for the projection of a united cohesive voice.</p> <p>10.3 Facilitate the preparation of regionally significant proposals and responses, in alignment with the TNQREP, on behalf of the partners and regional stakeholders.</p>	Advance Cairns	2011-2016				
Economic data and tools	10.4 Provide reliable and current economic data and tools to inform decision making and to provide accurate information relating to economic advancement in Tropical North Queensland.	The Cairns Institute	2011-2016				
Communications strategy	10.5 Develop and implement a communication strategy that engages the media and financial institutions in an economic positivity and confidence building agenda.	Advance Cairns	2011-2013				
Economic collaboration	<p>10.6 Develop and communicate case studies to the community and stakeholders, which highlight how the subregions and the economic partners in Tropical North Queensland work collaboratively to achieve agreed outcomes.</p> <p>10.7 Develop and promote a mapping of economic development agencies and projects to inform TNQREP partners and their activities.</p>	Advance Cairns	2011-2013				
Regional leadership and identity	10.8.1 Cultivate regional leadership and promote a regional identity whereby the community identifies positively as the Tropical North Queensland region and shares the vision and goals of the TNQREP.	TNQREP Partners	2011-2016				

Develop a confident and united region that projects positively and cohesively

FOUNDATION STRATEGY	DEVELOP A CONFIDENT AND UNITED REGION THAT PROJECTS POSITIVELY AND COHESIVELY	LEAD PARTNER	TIMELINE	R&RI	TB	CCC	IE
Regional leadership and identity	10.8.2 Support initiatives that develop the leadership capacity of the region, in particular the next generation. 10.8.3 Identify and support community, national and global champions and utilise them to promote the TNQREP and the TNQ economy.	TNQREP Partners	2011-2016				
Economic resilience	10.9 Undertake research and planning to identify and action initiatives to build economic resilience in the face of natural disasters.	The Cairns Institute	2011-2016				
Government collaboration	10.10 Promote cooperation and coordination of activity between and across all levels of government and communicate this to the community.	RMCN/ FNQROC	Ongoing				
Linkages with neighbouring economies	10.11 Develop productive working relationships with neighbouring regions to maximise economic development linkages.	Advance Cairns	2011-2012				
Increase local purchasing	10.12 Support initiatives which encourage the usage of local products and services and build the capacity of local businesses to secure procurement contracts.	TNQREP Partners					

Monitoring and evaluation of the Tropical North Queensland Regional Economic Plan

The Tropical North Queensland economy will be regularly measured and analysed using two levels of data.

Firstly, the economic profile will be updated annually illustrating changes in the key economic measures and providing consistent long term analysis. Secondly, the performance measures nominated for each strategy will also be reviewed on annual basis to determine the impact of the activities undertaken within that strategy. An initial base line for the strategy performance measures will be established in the year 2011-12 and thereafter tracked.

The strategy performances measures are designed to be a tracking mechanism therefore targets have not been established. It is acknowledged these measures may be reviewed over the lifetime of the action plan.

An annual review and reporting event will be convened at which the partners will account for their actions and describe the outcomes. This event will also provide an opportunity for the updating of the action plan and incorporation of any additional activities to retain the five year horizon.

References and acknowledgements

ACRONYMS

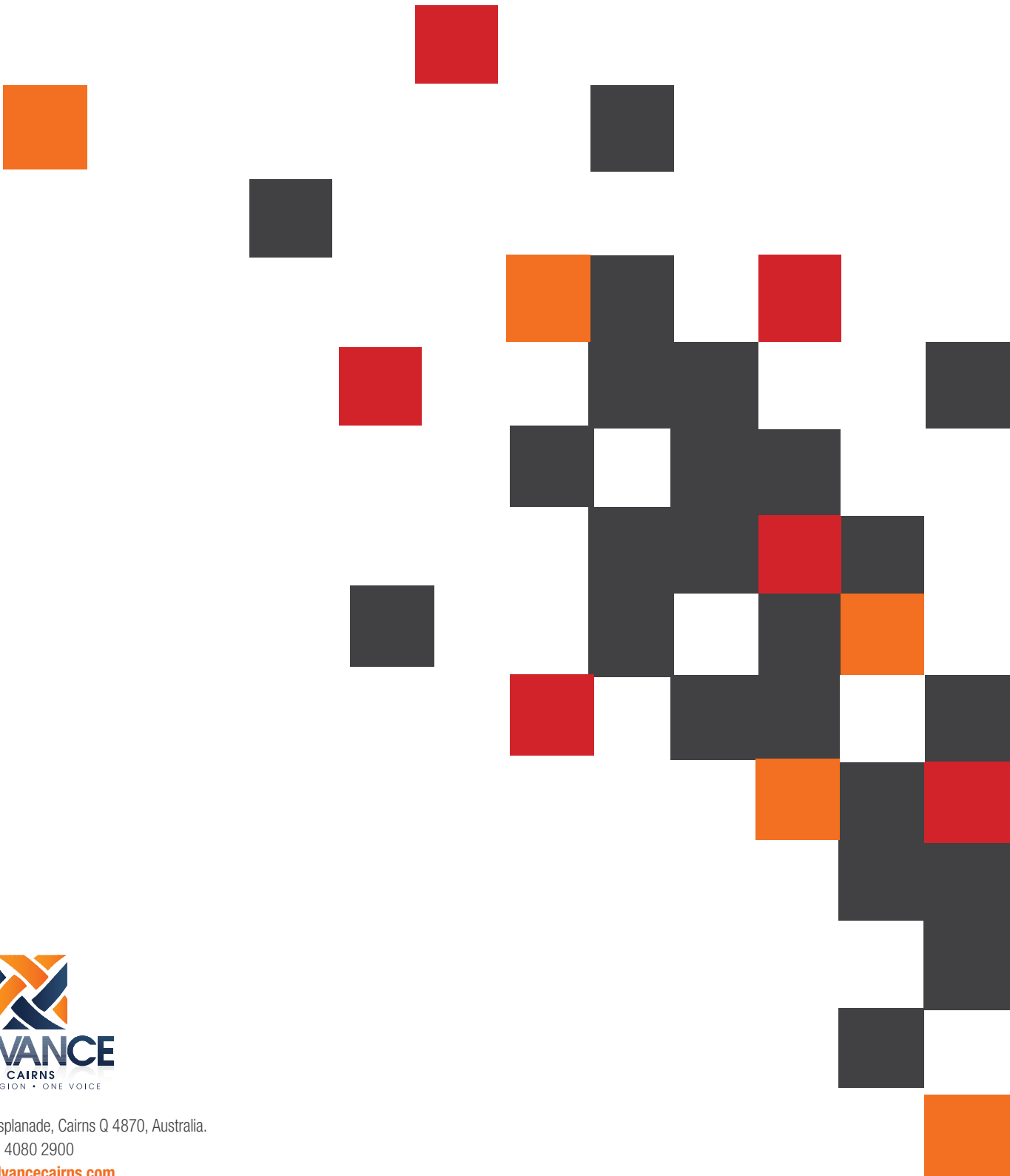
ACRONYM	MEANS	WEBSITE
AAGC	Australian Aviation Group Cairns	http://www.aviationcairns.com.au/
ABS	Australian Bureau of Statistics	
AC	Advance Cairns	http://www.advancecairns.com/
AC BEC	Advance Cairns Business Enterprise Centre	http://www.advancecairnsbec.com.au/
AC SFS	Advance Cairns Skills Formation Strategy	http://www.advancecairns.com/skills-formation-strategy/
CASC	Cairns Aviation Skills Centre	http://www.aviationaustralia.aero/facilities/locations/cairns
CCoC	Cairns Chamber of Commerce	http://www.cairnschamber.com.au/
CRC	Cairns Regional Council	http://www.cairns.qld.gov.au/
DEEDI	Department of Employment Economic Development and Innovation	http://www.deedi.qld.gov.au/
DLGP	Department of Local Government and Planning	http://dlgp.qld.gov.au/
DTMR	Department of Transport and Main Roads	http://www.tmr.qld.gov.au/
FNQROC	Far North Queensland Regional Organisation of Councils	http://www.fnqroc.qld.gov.au/home/index.htm
GBRIMC	Great Barrier Reef International Marine College	http://www.gbrimc.com.au/index.php/
IBA	Indigenous Business Australia	http://www.iba.gov.au/
JCU	James Cook University	http://www.jcu.edu.au/
LEC	Local Employment Coordinator	
LGA	Local Government areas (<i>Cairns, Cassowary Coast, Tablelands and Cook Shires</i>)	
LTO	Local Tourism Organisations (<i>Tropical Tablelands Tourism</i>)	
PNG	Papua New Guinea	
QITE	Quality Innovation Training and Employment	http://www.qite.com/
RDA FNQ&TS	Regional Development Australia Far North Queensland and Torres Strait	http://www.rdafnqts.org.au/
RRRC	Reef and Rainforest Research Centre	http://www.rrrc.org.au/
SYGGBR	Super Yachts Group Great Barrier Reef	http://www.superyachtgroup.com/
TIWG	Tablelands Industry Workforce Group	http://www.tablelandsworkforce.com.au/
TNQREP	Tropical North Queensland Regional Economic Plan	http://www.advancecairns.com/tnqrep/
TTNQ	Tourism Tropical North Queensland	http://www.ttnq.org.au/

OTHER SUPPORTING ORGANISATIONS

ORGANISATION	WEBSITE
Ag Force	http://www.agforceqld.org.au/
Cairns Airport Limited	http://www.cairnsairport.com.au
Ports North	http://www.cairnsport.com.au/content/portsnorth-home.asp/
Skills DMC	http://www.skillsdmc.com.au/
The Cairns Institute	http://www.jcu.edu.au/cairnsinstitute/about/JCUTST_057560.html

REFERENCES

Tomaney, J (2010) *Place – Based Approaches to Regional Development: Global Trends and Australian Implications*. A report for the Australian Business Foundation. Sydney.



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