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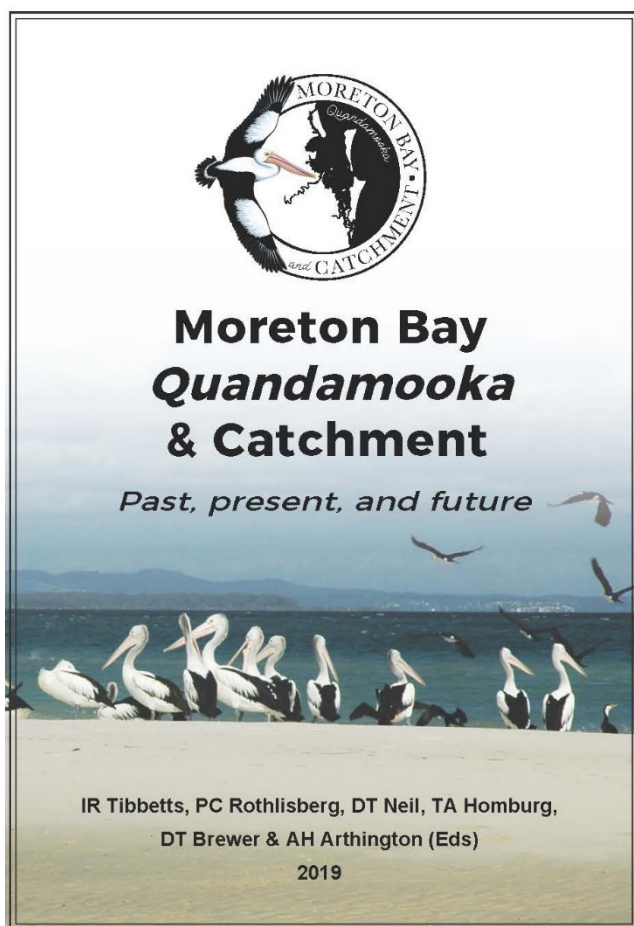
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Tourism in the Moreton Bay Region

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Abstract

Tourism is of growing importance to the Moreton Bay regional economy with increasing numbers of international and domestic visitors, as well as local day-trippers. The Moreton Bay Region has well-developed infrastructure with a range of natural and built resources that have seen Moreton Bay form an important part of the Brisbane region's tourism product and market appeal. However, the increasing use of the Bay and the surrounding coastline by tourists and recreational users has wide-ranging impacts on the sensitive host ecosystems which are already under pressure from surrounding urban development. This is one of the key challenges for the sustainable development of the region. Opportunities exist to further develop the Indigenous tourism products and event sector to further differentiate the region from its competitors in South East Queensland. This chapter reviews key tourism statistics and visitor markets for the Moreton Bay Region, as well as the tourism governance arrangements and key policies and strategies for tourism. Opportunities and challenges for sustainable tourism in the region are considered, including marine recreation and tourism, tourism impacts and sustainability, Indigenous tourism and events. We also provide an audit of the region's tourism infrastructure, products and experiences, as well as accommodation.

Keywords: visitors, governance, marine tourism, Indigenous tourism, events

Introduction

Moreton Bay is one of South East Queensland's most diverse areas. From a tourism perspective, it is a rapidly growing region that offers visitors a variety of distinct coastal and hinterland experiences, together with a range of special-interest events and attractions. The region's core appeals are its diverse natural assets — islands, beaches, coastal Bay towns, a marine park and hinterland mountain retreats. As a tourism region, one of its strengths is its location within an hour's drive of a major capital city; however, this proximity also presents many challenges by placing pressure on its natural assets.

The Moreton Bay area primarily targets South East Queensland ‘short-breaks’¹. Therefore its brand positioning aims to differentiate it from other Queensland Bay and island destinations, such as the Gold Coast (including South Stradbroke Island), the Sunshine Coast, the Fraser Coast (including Fraser Island), the Whitsundays, and Townsville (including Magnetic Island). This paper provides an overview of tourism in the Moreton Bay Region and assesses opportunities and challenges through a review of documents related to tourism in the Bay, such as visitor statistics and Council tourism strategies.

Importance of tourism to the Moreton Bay Region

Tourism is of growing importance to the Moreton Bay Region (encompassing both the Moreton Bay Regional Council and Redlands City Council areas), accounting for approximately 2.7% of the Moreton Bay Regional Council’s gross regional product (\$313 million) and 1.2% for the Redlands City Council area (\$46 million) (1–4).

While tourism statistics for the Moreton Bay Region are contained within the broader Brisbane tourism region (which consists of the local council areas of Moreton Bay, Redlands City, Brisbane City, Logan City, Ipswich City and the Scenic Rim), it is estimated that 20.6% of visitors (overnight and daytrips) to the Brisbane tourism region between 2009 and 2012 visited the Moreton Bay Region (3,831,000 visitors), and 13.4% of visitor nights were spent in the Moreton Bay Region (4,352,000 visitor nights) (5, 6). Only 7% of visitors to Queensland visited Moreton Bay, with 3.8% of total Queensland visitor nights spent in the Moreton Bay Region (5, 6).

Tourism employment statistics are also difficult to define because the Australian Bureau of Statistics does not classify tourism as a separate industry. However, it is possible to estimate tourism-related employment through other industry classifications, in particular, ‘Accommodation and food services’ (close to a third of tourism-related jobs in Queensland) and ‘Retail trade’ (one in six tourism-related jobs in Queensland) (7). For instance, Tourism and Events Queensland estimate direct employment in tourism-related services equates to more than 1 in 20 jobs in Queensland (7). For Moreton Bay, tourism-related employment is estimated to account for approximately 4% of total employment in both the Moreton Bay Regional Council and Redlands City Council areas, equating to approximately 6,562 tourism-related jobs in the broader Moreton Bay Region (2, 3). Employment levels in ‘Accommodation and food services’ (6.8%) contribute to tourism’s ranking as the fifth largest industry in Moreton Bay and fifth largest in Redlands (8.7%) (2, 3).

Visitors to the Moreton Bay Region

The Queensland tourism market is dominated by four tourism regions (Brisbane, the Gold Coast, the Sunshine Coast and Tropical North Queensland) that collectively receive more than 80% of international visits and almost 72% of all domestic trips (8, 9). While domestic tourism to the greater Brisbane region (including the Moreton Bay Region) represents a greater number of visits compared to international tourism (6,894

domestic visitors compared to 1,274 million international visitors in 2017) (8, 9), domestic tourism growth has been more subdued. Since 2000, domestic visitation has been growing at a rate of approximately 1.6% per annum (10); while Brisbane's (including the Moreton Bay Region) share of the international visitor market in Queensland grew from 33.6% to 46.2% between 2000 and 2016, representing an average annual increase in international visitor nights of approximately 3% per annum (10). This growth in the international market can largely be attributed to the emergence of new source markets and, in particular, the growth of the Chinese market, but also India and other South East Asian nations. These markets prefer to visit major cities and this has seen a shift in tourism activity towards destinations such as Brisbane (11). Such a trend provides an opportunity for the Moreton Bay Region to leverage off the growing Brisbane tourism market, perhaps by highlighting the proximity of the region to Brisbane and hence the opportunities for daytrips from Brisbane to the Bay region.

International visitors to the Moreton Bay Region are primarily from New Zealand, Asia and the United Kingdom. Compared to Queensland as a whole, the region excels at attracting visitors from New Zealand (34% vs state average of 20%) and the United Kingdom (16% vs state average of 11%), while it has not done as well in capturing the Asian market (23% vs state average of 37%) (5, 6).

Domestic visitors to Moreton Bay are largely from the greater Brisbane area (58%) and it is a more popular destination for daytrips than overnight stays — 66% of day-trippers come from the Brisbane region, while only 31% of the overnight market comes from Brisbane. For the southern end of the Moreton Bay Region (the Redlands City Council area), domestic day-trippers from the Gold Coast are an important segment (23%), whereas more domestic day-trippers from the Sunshine Coast (19%) visit the northern end of the Bay (the Moreton Bay Regional Council area). A further 31% of the overnight visitor market is from other Australian states and the remainder from other regional areas in Queensland (5, 6).

The largest proportion of visitors (international and domestic) to the Brisbane region travel to see family and friends (approx. 40%). However, a higher proportion of international tourists are visiting for a holiday. The most commonly used type of accommodation is staying with friends and relatives (69%), followed by house/apartment/unit/flat (16%) (5, 6).

The most popular activity during a visit to the Moreton Bay Region for domestic visitors (including both daytrips and overnight stays) is spending time with friends and family, undertaken by about 47% of domestic visitors. Other popular activities include eating out at restaurants (38%), going to the beach (including swimming) (18%), and general sightseeing (16%) (5, 6).

While the Moreton Bay Region is host to a wide range of visitors and recreational users, many of them would not view themselves as tourists, nor be captured in the formal tourism data. Nevertheless, all of these people are visitors to the waters of the Bay,

whether local resident or not, and each places value on the resources of the Bay for recreation and enjoyment.

Supply of tourism in the region

In addition to the services and products that are typical of most urban areas (cafes and restaurants, cycling and pedestrian paths, markets, parks, and sporting infrastructure such as bowls and golf clubs), the Moreton Bay Region has a number of unique tourism assets, infrastructure and experiences (Table 1), as well as a variety of accommodation options (Table 2). While marketing of the region does indeed highlight these unique aspects, they additionally provide an opportunity to further differentiate the region and hence potentially further grow tourism to both the Moreton Bay and Brisbane regions.

Table 1. Moreton Bay Region tourism infrastructure, product and experience audit.

<p>National Parks (NP)</p> <ul style="list-style-type: none"> • South Stradbroke (50% NP), Moreton Island (98% NP), Bribie Island (33% NP), Peel Island (100% NP), St Helena Island (100%) • Venman Bushland National Park, D’Aguilar Ranges National Park – South D’Aguilar and Mount Mee sections, Bellthorpe National Park • Fort Lytton National Park including historical area
<p>Reserves, wetlands, conservation areas</p> <ul style="list-style-type: none"> • Buckley’s Hole Conservation Park, Sheep Station Creek Conservation Park, Bunyaville Conservation Park, Point Halloran Conservation Area • Bribie Island Recreation Area, Mt Glorious recreation area, Mt Nebo recreation area, Lake Samsonvale and Mt Samson recreation precincts • Bunya Crossing Reserve, John Oxley Reserve, Victoria Point Reserve, King Island – Wellington Point Reserve, Nudgee Beach Reserve • Egret Colony Wetlands, Glen Road Wetlands, Black Swamp Wetlands, Geoff Skinner Wetlands, Valley Road Wetlands
<p>Marinas and water-based activities and experiences</p> <ul style="list-style-type: none"> • Fishing, beaches and beach activities, surfing, scuba diving • Compass Marina, Newport Marina, Scarborough Marina, Cleveland Harbour and Marina, Manly Harbour • Victoria Point, gateway to Coochiemudlo Island • Whale-watching cruises, various cruises/boat charters, Bay and island cruises • St Helena tours
<p>Animal sanctuaries</p> <ul style="list-style-type: none"> • Tangalooma dolphin experience, Alma Park Zoo, Kumbartcho Sanctuary, Lyell Deer Farm
<p>Adventure tourism experiences</p> <ul style="list-style-type: none"> • Scuba diving, 4WD driving, camel rides, sand-dune tobogganing, paragliding, quad biking, hiking • Lakeside Park raceway, Bushy Browns Adventure Ski Park, skydiving (Redcliffe), Surf Connect Watersports Centre

Museums and culture

- Pine Rivers Heritage Museum, Redcliffe Museum, Avicultural and Poultry Museum, Caboolture Historical Village, Caboolture Warplane Museum, Samford District Historical Museum, Woodford Community Museum, Redlands IndigiScapes Centre, Queensland Ambulance Museum, Sandgate and District Historical Society and Museum, Salt Water Murriss' Quandamooka Gallery, Minjerribah Moorgumpin Aboriginal Elders in Council house

Wineries

- Dr Red Winery, Ocean View Estate Winery, Sirromet Winery

Note: The summary list was compiled based on online database searches from Visit Brisbane, Moreton and the Redland and Moreton Bay Regional Councils' website. Operators without a website may not have not been included.

Table 2. Moreton Bay Region accommodation audit.

	North Stradbroke	Mainland Redlands City Council	Southern Moreton islands	Bribie Island	Mainland Moreton Bay Regional Council	Moreton Island	Total
Beds and breakfasts	1	2	4	3	16	0	26
Cottages and cabins	5	1	5	0	18	0	29
Guesthouses	1	1	0	0	7	0	9
Farmstays	0	0	0	0	3	0	3
Motels and hotels	0	11	0	2	19	0	32
Resorts, holiday apartments and units	14	0	3	8	8	1	34
Caravan parks and camping	9	0	3	10	13	5	40
Backpackers	1	0	0	0	1	0	2
Total	31	15	15	23	85	6	175

Note: The summary list was compiled based on online database searches from Wotif, TripAdvisor, Google, Visit Brisbane, Moreton Island Accommodation and Redland and Moreton Bay Regional Council's website as of June 2018. As there are many operators in the region who are yet to 'go online' with their tourism business, there may be operators who have not been included in this summary list. This list does not include privately owned houses that are rented out as holiday homes.

Moreton Bay Region tourism marketing

Moreton Bay is currently promoted within the broader 'Visit Brisbane' tourism campaign, whereas strategies to promote the 'Moreton Bay and Islands' as a travel destination are developed and managed by 'Brisbane Marketing'. Brisbane's tourism development plans rely on the natural features of the Moreton Bay Region — the

Moreton Bay Marine Park, D’Aguilar National Park, and three of the world’s largest sand islands: North Stradbroke (Minjerrabah), Moreton (Moorgumpin) and Bribie Island (Yarun) — as key assets by which the Brisbane tourism region can differentiate itself from other capital cities.

The Moreton Bay Regional Council and Redlands City Council both promote tourism through tourism information centres and their websites. Within the Moreton Bay Regional Council area, there is also a third organisation tasked with developing and executing destination marketing projects and campaigns to promote the region — Moreton Bay Region Industry & Tourism (MBRIT). This industry-led, destination management organisation focuses on tourism in only the Moreton Bay Regional Council area and promotes only those organisations that are financial MBRIT members.

State/regional tourism policy and planning

The key tourism planning document for the Brisbane tourism region is the *Brisbane Visitor Economy Strategy: A Destination Tourism Plan for Brisbane 2014–2020*. Key priorities as outlined in the Plan related to the Moreton Bay Region (Moreton Bay and Redlands) include:

- Increase economic contribution of tourism to the Bay by converting day visits to overnight trips;
- Growth and development of tourism consistent with community values and lifestyle considerations, and by promoting a collection of Moreton Bay Adventure Experiences across the region as key events and an economic strategy;
- Extend market share, length of stay and the value of tourism to the Redlands;
- Encourage investment in tourism accommodation;
- Develop a working group with industry and government representation to develop an overarching strategic plan for the transition from mining to tourism on North Stradbroke Island;
- Create new precincts (destinations) that meet the needs of locals and visitors with tourism-orientated development, facilities, infrastructure and marketing;
- Build a positive image for the region and support the local way of life while embracing our indigenous history and living culture;
- Become a year-round destination leveraging our climate and range of activities and experiences; and
- Activate public spaces for festivals and events and actively assist event organisers to hold events in the Redlands.

Other current strategies include the *Queensland Tourism Investment Guide 2016* which details the Queensland Government’s key strategies to increase the attractiveness of Queensland’s tourism industry, and the *Brisbane City & Hinterland Regional Tourism Investment and Infrastructure Plan 2008–2018*. They identify key infrastructure projects for the Moreton Bay Region including:

- Improving/changing the transport infrastructure to and on the Moreton Bay islands. This specifically includes ferries, piers and jetties, transportation options on the islands, and interaction between the various transport modes;
- Improvement to public transport on the Moreton Bay coast (e.g. redeveloping rail stations, creating light rail/trams on disused rail lines, and running more buses such as from Caboolture to Bribie Island);
- Providing opportunities in appropriately defined locations within the island national parks for eco-accommodation to be built; and
- Improving the management of waste water within the Bay area in order to ensure no/limited compromise to the marine environment (12–14).

Opportunities and challenges for sustainable tourism in the Moreton Bay Region

Marine recreation and tourism in the Bay

Moreton Bay has a wide range of commercial tourism operations that use the waters and intertidal areas of the Bay as their primary attraction. These operators tend to focus on attractions that are either wildlife related — such as dolphins, humpback whales (July to October), dugongs and seabirds — or on specific activities that have demand from locals and visitors. Examples include fishing, scuba diving, snorkelling, surfing and sailing. In addition, two commercial tourism resorts are based on the western shores of the islands that bound the eastern edge of Moreton Bay. Tangalooma Resort, on the western shore of Moreton Island, was established in the 1960s and in its early years primarily served local residents and visitors from southern states during school holidays and the winter months. During the 1990s, the resort transitioned from a timeshare-based model focused on the domestic Australian market to a more diverse market. Customers now include international package tourists from South East Asia, and independent travellers from the northern hemisphere and from New Zealand. Most recently, the resort has developed apartments/units and house-and-land packages which are sold to clients who then become frequent and regular visitors to the resort and the island. Couran Cove Resort, on the western shores of South Stradbroke Island, is a more recent development. In a similar way to Tangalooma, it strongly markets itself as an ecotourism-style location whereby visitors can experience a close connection to the natural environment of Moreton Bay and the surrounding islands.

Despite some significant tourism infrastructure, most of the marine tourism that occurs in the Bay area is neither resort-based nor commercial tour-led. It is instead more self-directed whereby both local residents and visitors to the region engage in recreational activities associated with the Bay. This more casual self-directed recreation is significant but quite difficult to quantify. Examples include renting four-wheel drive vehicles, camping, exploration trips on Moreton Island (which often involve sightseeing, fishing, beach walking, swimming, surfing, snorkelling and so on), transport to islands for day- or overnight trips, such as to North Stradbroke, St Helena, Coochiemudlo, Peel, Bribie and Moreton islands. Boat-based voyages are also a major use of the Bay ranging from small trailer outboard engine-powered boats to larger charter yachts. Access to the Bay for launching and retrieving vessels is via many public

boat ramps and major marinas at Manly, Scarborough, Rivergate (Brisbane River) and Cabbage Tree Point (Woongoolba). Other users access the Bay from marinas based on the Gold Coast or the Sunshine Coast. In addition, a major feature of the coastal environment in South East Queensland has been the establishment of residential communities based on human-made canals. Such developments provide local residents with access to the waters of Moreton Bay via docks, boat ramps and piers built within these canal-based residential communities. As a consequence, many recreational users of the Bay are property owners or renters who see Moreton Bay as their ‘playground’.

A further significant and distinct sector of visitors who are frequent users of the Bay are those who have their primary residences elsewhere but who own holiday homes or apartments in the Moreton Bay coastal region. These semi-residents tend to use these properties as investments (both for short-term rental to visitors and for capital gain) and as places for their own vacations. Many of these semi-residents live permanently in southern states or New Zealand and use the warmer climates of South East Queensland as an ‘escape from the winter’.

Tourism and recreation impacts and sustainability

The increasing use of the Bay and the surrounding coastline has a wide range of effects on the host ecosystems and often adds pressure to locations already compromised by many other human influences. Moreton Bay has long been recognised as a special and sensitive ecosystem. Its designation as a marine park is an explicit attempt to ensure that human interaction in the park is sustainable and that ecological values are conserved. The location of the rapidly growing city of Brisbane and the associated urban development of the coastline and near-shore coastal catchment present the most significant challenges for the Bay. The effects of human activities on the Bay are numerous and include: water run-off, sedimentation, increased nutrient loads, toxins and chemicals, coastal infilling, dredging, dumping, coastal structures, canal developments and coastal current redirection, commercial and recreational overfishing, noise pollution, introduction of alien and harmful organisms, wildlife disturbance, litter and debris, eutrophication of tidal estuaries, increased water temperatures (due to climate change and the decreasing depth of the Bay and reduced current flows), growth and encroachment of mangroves, and coastal erosion. Such degradation paints a bleak future for Moreton Bay and causes many to question whether sustainability is in fact achievable.

The growth of tourism and recreational use of the Bay forms part of this wider pattern of increasing effects of human activities on the Bay and could be viewed as a further contributor to human-induced degradation. However, it is worth remembering that part of the motivation for establishing the Moreton Island National Park, Bribie Island National Park, Moreton Bay Marine Park and other protection mechanisms, which have stopped the development of these important areas, has been because of their value for recreation and tourism. Further examples of hope include the strong evidence that humpback whales (*Megaptera novaeangliae*), once hunted to near extinction off the

eastern Australian coast, have made a remarkable and strong recovery. In addition, the movement to stop sandmining on the Moreton Bay barrier islands was fought and won by many residents and visitors who love the Bay region for its ecological and recreational values. Many conservation initiatives exist in the Moreton Bay Region and those who use the Bay for recreation and as visitors (whether locally resident or not) are the leaders and contributors to these initiatives. This is where the key lies for the sustainable use of the Bay.

Indigenous tourism

North Stradbroke Island or Minjerribah is the home of the Quandamooka Peoples who offer a range of Aboriginal cultural experiences, from guided headland and bush walks to boomerang painting and throwing. Visitors can experience traditional Aboriginal song and dance, discover the bush tucker trail, learn more about the art and craft of the Quandamooka Peoples, see a cultural site thousands of years old and take a whale-watching cultural tour. The Quandamooka Yoolooburrabee Aboriginal Corporation (QYAC) offers cultural experiences for tourists, school and university groups. It also helps to develop cultural tours, talks, presentations and demonstrations in line with school and university curriculums. QYAC is currently involved in the Amity Eco Project with Straddie Camping and the Australian Government's Australian Trade Commission. This project aims to improve the North Stradbroke Island camping holiday experience and to present the camping grounds in such a way that the nature and culture of North Stradbroke Island is celebrated and respected (15, 16). Each cabin will draw inspiration from traditional Australian tent styles and the quintessential North Stradbroke Island beach shacks, whilst also integrating the Quandamooka Peoples' cultural considerations in design concept and application (15, 16).

In the North Stradbroke Island town of Dunwich there are two Indigenous-operated galleries — Salt Water Murris' Quandamooka Gallery and Minjerribah Moorgumpin Aboriginal Elders in Council (MMEIC) house. The Salt Water Murris' Quandamooka Gallery is a contemporary Aboriginal visual arts and craft centre while MMEIC houses an exhibit depicting the history and culture of Minjerribah–Moorgumpin (North Stradbroke Island and Moreton Island) and a mini bush-tucker trail on the grounds. This trail is the prototype for the one being developed at Terra Bulla Luemeah Conservation Reserve. On the mainland is the Redlands IndigiScapes Centre. While the centre is primarily a botanic garden that offers a number of guided experiences, one of those experiences is the Indigi Bush Tucker Tour (17).

In addition to the Indigenous tourism experiences offered on Stradbroke Island and at IndigiScapes, the Redland City Council has plans to build on the Moreton Bay Region's significant Indigenous cultural history (4). As outlined in the *Redland City Tourism Strategy and Action Plan 2015–2020*, there are plans to create better links with the international cruise market in the area to offer combined local half-day eco tours and Indigenous products. Day excursions are also planned to tap into the local South East Queensland high-school market. With the redevelopment of the Toondah Harbour, the

Council has an opportunity to advocate for including an Indigenous Interpretive Centre (4).

Events

The broad assortment of festivals and events that are staged across Moreton Bay make a significant contribution to the diverse appeal and cultural depth of the region. The range of festivals and events that occur in Moreton Bay (i.e. concerning business, charity/fundraising, performing and visual arts, education, environment, lifestyle, health and wellbeing, sport, and markets) showcase an abundance of creativity, innovation and inventiveness synonymous with the region. Concomitantly, they also attract tourists eager to participate in the gamut of experiences offered by the variety of festivals and events staged across the Bay. For instance, each year the Quandamooka Festival, an Indigenous cultural event, is celebrated from July to September and offers activities across the Redlands, Moreton Bay and Brisbane area. Highlights of the festival include cultural tours, traditional song and dance, music, art exhibitions, workshops, film nights, traditional food, markets, storytelling, weaving, sand art, sporting events and speakers' forums (18). Additionally, Queensland Youth Week is a sporting event hosted by the Royal Queensland Yacht Squadron. This major youth yachting regatta is held over a week during the July school holidays and attracts around 200 competitors and 150 supporters and has grown to become a significant annual regatta for the Australian competitive sailing community. In addition, the Brisbane to Keppel Yacht Race, which began in 2006, is a major coastal yachting event that begins in Moreton Bay each August.

Currently, there are number of signature events in the Moreton Bay Region, including the Urban Country Music Festival, the Pine Rivers Festival, Celebrate Redcliffe Festival and the Festival of Sails. In 2010–2011, events in Moreton Bay enjoyed an overall attendance of 157,000 people (19). Along with these signature events, the Moreton Bay Regional Council is not only 'investigat(ing) the opportunity to conduct an annual arts event to showcase the region's creativity'(20 p8), but are also working to develop a range of high-profile and community festivals and events to ensure 'residents and visitors can participate in diverse community events, recreation and cultural opportunities' (19 p4).

Community events can be a unique expression of the Moreton Bay Region and increasingly represent an opportunity to grow community-based tourism. Indeed, the daytrip traveller market, the purpose of which is to participate in events and festivals, has the potential to continue to grow strongly. Therefore this sector needs to continue to be targeted as a key initiative in local tourism and economic development. However, at the same time, it is important that the region works to avoid negative social and environmental impacts that can occur as a result of events (e.g. noise pollution, crowding, waste) by embracing sustainable event-management practices.

Conclusions

Tourism is arguably of growing importance for the Moreton Bay regional economy and forms an integral part of the wider tourism product and market appeal of the Brisbane region. Tourism to Moreton Bay has increased over the past decade with growth in both international and domestic arrivals; and, at the same time, the region remains popular with daytrip visitors from South East Queensland. Tourism infrastructure in the region is growing, yet there are further opportunities to improve visitor length of stay and spending, particularly in commercial accommodation providers, as the region has such a large proportion of day trippers and visitors visiting friends or relatives. These strategies have been identified as priorities in the various state, regional and local development strategies.

While there is much opportunity for developing tourism, the region must contend with the increasing impacts of human activities on the Bay by tourist and recreational users. This presents a significant challenge for the sustainable development of the region and arguably the extent to which conservation initiatives can be maintained and extended is key for the sustainable future of the Bay and broader region. Opportunities exist in terms of developing the region's Indigenous tourism product as well as the event sector. Both have appeals for local as well as interstate and domestic visitors and present opportunities to further differentiate the Moreton Bay region from competitors.

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