Section 5

VISION – THE WAY FORWARD

- A refocused Vision for DFWP - Where do we want to be by 2020?
- Vision
- Guiding Principles
- Standing out in the Marketplace: DFWP’s Unique Selling Position
- Enablers of Success
- What will Shape Success in 2020?
- Performance Objectives
- 2020 Objectives
- Partnership Approach
A REFOCUSED VISION FOR DFWP
WHERE DO WE WANT TO BE BY 2020?

On current estimates, the Park attracts 17,000 visitors, and from a financial investment perspective, there are a number of key opportunities available to achieve a better return on investment for government.

A key issue emerging from review of the Park’s operation is the need for a clear vision and focus for the Park’s operation, with clear, measurable and achievable (albeit stretch) targets.

Much of Dr Fleay’s vision for the Park remains valid.

If turnaround in the Park’s fortunes is to be achieved, the challenge is to evolve this original vision into today’s market context, and implement it in an ever-more competitive climate.

Feedback from stakeholders provided a clear view of what the Park is, and is not, and where its strengths and opportunities rest.

Key themes included;
• A consistent and sustained stakeholder vision
• Build on the passion for the Park from stakeholders
• Engaging visitors and communities
• Re-Connecting with nature
• Unlocking the locational advantages
• Focus on practical improvements
• Focus on what DFWP does best
• A partnership approach.

DFWP should provide visitors with unique, interactive edu-tainment experiences where they have fun and learn about our native wildlife. It becomes a showcase for QPWS conservation activities across the State through hands-on learning experiences which;
• Are affordable and entertaining for families, where they can also learn;
• Promotes our natural heritage and environment;
• Delivers a gateway function for QPWS, growing awareness of the Service’s State-wide parks and wildlife assets;
• Educates our youth with structured programs;
• Becomes a hub and supports our local community; and
• Delivers good value and returns on Government’s investment.

By doing so;
DFWP will be an exemplar of a modern wildlife centre, applying leading practice methods in native animal conservation, and explaining why it is best to take this approach, while providing visitors customers with an up close and personal, and entertaining experience.

By 2020 David Fleays Wildlife Park will be delivering life changing experiences to over 50,000 visitors per annum and covering 70% of operating costs through innovations and partnerships.
GUIDING PRINCIPLES

In achieving this vision a number of guiding principles need to be formed. The Park requires;

- A clear unique selling point (USP) that highlights the unique assets of DFWP and promotes visitation growth and increased length of stay through a world-class “must-see” experience;

- A sustainable business model that contains feasible and viable products that can be refreshed and rejuvenated and do not stagnate;

- A two stage master-plan implementation process: a long term vision and a short term clear/costed investment plan; and

- A partnership based approach: including commercial, community and conservation partners to both boost attendance (and revenue) and reduce the costs of delivering measurable outcomes.

STANDING OUT IN THE MARKETPLACE: DFWP’S UNIQUE SELLING POSITION

DFWP’s unique selling proposition is in ranger-led experiences and edu-tainment, comprising;

- Strong curriculum links;

- Partnerships with university and research institutes;

- Partnerships with community and commercial stakeholders;

- A conservation flavour, but hands-on experiences which builds an emotional attachment for visitors; and

- Retains Fleay’s focus - getting people up close and personal to give them an experience to remember (and learn from it).

ENABLERS OF SUCCESS

Feedback from consultation has identified a series of prerequisites which will need to be addressed if the Park and its staff are to have the opportunity to deliver the Vision set out in this master-planning document;

The Park should be;

- Run on a business-like approach within the natural capacity of the site with budgets, business plans, KPIs, targets, marketing strategies, and accountability for all staff

- True to the original focus of the Park established by Dr Fleay

- Connected and accessible to target visitor audiences

- Ranger-led in its approach to telling the DFWP and QPWS stories

- Education/edu-tainment focused in terms of the experience provided to visitors

- Fully engaged with local communities

- Mindful of competitive neutrality – partnering with private sector where appropriate to deliver services

- Committed to forming partnerships with community, business, and education and tourism networks.

- Driven by key marketing, attraction, education and conservation skillsets.
WHAT WILL SHAPE SUCCESS IN 2020?

Alongside identified market demand and the Park’s growth potential, as a site it is recognised that a number of key factors will shape the master planned vision and objectives;

- The site has a natural capacity in the region of 50-60,000 visitors per annum – key constraints include the overall size of the site and facilities such as car parking provision
- The character of the site, the product on offer and where stakeholders felt that its strengths and opportunities rested, were based on quiet enjoyment, conservation, natural habitats and authentic surroundings
- Overall the site is not conducive to large scale built development - theme-park style hard rides would not fit with the visitor market or surroundings
- Engagement with local communities and delivering an educational experience are central to the Park’s remit
- As a Government managed and funded destination, the Park should not directly provide services which would normally be best provided by the private sector - this position limits revenue raising potential
- While the Park has the potential to be managed in a more business-like and commercial manner to maximise revenue generating potential, the nature of the site and the type of product provided means that it is an unrealistic expectation for the business to have the potential to reach a financial break-even position, in the short to medium terms - particularly under a Government direct-delivery model and where the level of resources able to be committed beyond the immediate future is uncertain

MEGATREND IMPLICATIONS

The natural habitat at DFWP plays strongly to Queensland’s ‘natural advantage’; however, focus needs to be placed up the experiences offered in order to meet with expectations of visitors.

SPECIES MANAGEMENT

The Park houses a range of animals on site. They form the foundation of the visitor experience and also part of the story of the Park. A key weakness is that the type of animals on display at the Park have not been decided in accordance with what the visitor wants to experience nor with a strategic intent about demonstrating a particular type of species. A full species management plan will be required as an element of implementing the master plan.

With regard to the introduction of new species, it is recommended that clear protocols and checklists are introduced and established before species are introduced. These include (but are not limited to);

Table 7: Suggested Species Introduction Protocols

<table>
<thead>
<tr>
<th>Protocol</th>
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<tbody>
<tr>
<td>Will the species promote our natural heritage and environment (and what the State Government is doing to support and enhance)?</td>
<td>✔</td>
</tr>
<tr>
<td>Does the species help in promoting education, conservation and understanding about wildlife?</td>
<td>✔</td>
</tr>
<tr>
<td>Is there conservation value to be obtained by managing and displaying the animals/birds?</td>
<td>✔</td>
</tr>
<tr>
<td>Does DFWP staff have the expertise to manage proposed animals/birds humanely, safely and cost effectively?</td>
<td>✔</td>
</tr>
<tr>
<td>Is there breeding value to be obtained by introduction of the proposed animals – endangered or can we subsequently release offsite e.g. birdwing butterfly, tree kangaroos?</td>
<td>✔</td>
</tr>
<tr>
<td>Are other wildlife institutions doing the same thing as DFWP propose? If so, is there any leverage value?</td>
<td>✔</td>
</tr>
<tr>
<td>Does DFWP have sufficient resources, enclosures and resources to maintain the animals/birds?</td>
<td>✔</td>
</tr>
<tr>
<td>Do the proposed animals have any promotion or marketing value to enhance DFWP and the particular species?</td>
<td>✔</td>
</tr>
<tr>
<td>Will the animals be appropriate for introduction into talks, shows or free flight bird shows? for entertainment and education value?</td>
<td>✔</td>
</tr>
<tr>
<td>Consideration of whether the species contributes to the diversity of existing animal /bird species</td>
<td>✔</td>
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</tbody>
</table>
In addition, from a policy perspective, it will be necessary to make early and clear decisions on;

- Does the animal or bird have to be a north Australian native or can all Australian species be considered?
- Can DFWP contribute by being part of a larger recovery program, in partnership with University institutions for example, by breeding endangered species or contributing to research programs; e.g. Tasmanian devil remote breeding programs, Currumbin Sanctuary echidna research program with UQ.

There are a number of species that are essential in attracting the interest of visitors and which it is recommended should be addressed in a species management plan, including;

- Platypus – it is not common to see captive platypus in other wildlife parks. Maximise DFWP’s existing display assets
- The ability to walk through an enclosure with “hero and iconic species” expected in every Australian wildlife park – kangaroos, wallabies (and joeys), koalas, emus and potentially wombats
- Species such as bluetongue lizards, possums and stick insects for information talks and shows
- Bird species such as galahs, sulphur crested cockatoos and rainbow lorikeets (not necessarily walkthrough)
- Common native species such as echidnas and Tasmanian devils available on the surplus lists from other zoos and wildlife parks from time to time which should be considered
- To create an engaging experience for visitors and improve the attractiveness of the Park, each enclosure should contain some kind of wildlife attraction. The current situation where enclosures are vacant does not present the Park well and detracts from the visitor experience
- Snakes and common lizard species
- Nocturnal species – maximising the already excellent exhibits present on site.

Consultative feedback gathered during the study has provided a number of initial ideas for potential species introduction including;

1. Platypus – DFWP already has a breeding facility established – positive links with Dr Fleay
2. Insects and Arachnids – Interactive for children, great conservation messages
3. Species such as the Richmond Birdwing Butterfly (on site breeding) which could also be utilised for display and education purposes
4. Raptors (owls and eagles) – useful additions for interpretive presentations to increase visitor experience and value
5. Water Rats – Local species and highly interactive/ potential presentation opportunities
6. Mangrove/Marine Exhibit – Key messages about marine zones/parks and their ecological significance, potentially incorporating a water mouse display
7. Macropod species/ emus – walk-through exhibit potential
8. Frogs – Display frog species and advertise key NPRSR messages about chytrid fungus. Fleay’s barred frog discovered by Dr Fleay is not on display in Australia
9. Waterbird Species – related with water quality project
10. Echidnas – DFWP could have both Australian monotremes (platypus and echidna) on display.
11. Flying Foxes – Good educational focus. Key departmental messages to be delivered by DFWP
12. Spotlight tours – Increased viewing opportunities for nocturnal wildlife would require the acquisition of additional species such as Bettongs/Potoroos/Bandicoots, Wombats, Quolls, Glow worms, Geckos and Possum species.
While it is necessary to be responsive to opportunities as they become available, it is recommended that a priority list of new species (or more of existing species) be introduced, enabling planning for capital investment in enclosures, marketing, and education program development to be aligned.

ENDANGERED SPECIES/CAPTIVE BREEDING

In relation to endangered species and captive breeding and recovery programs, it is realised that a policy decision is required between QPWS and Department of Environment and Heritage Protection (EHP) regarding where and how these programs should take place in the context of threatened species management and the role DFWP would play.

DFWP continues to be an associate member of ARAZPA - Zoo Aquarium Association. This participation includes working with studbook keepers and species contacts throughout Australia. DFWP had previously been responsible for the management of several studbooks when undertaking the threatened species programs in collaboration with Threatened Species Branch (EHP).

DFWP has also been involved in numerous research projects with University of Queensland sending students to the park to undertake their post graduate studies. These research projects have diminished in recent times due to the declining collection, but a range of contacts remain in place, should a policy determination be made to re-establish and strengthen these links.

There is a clear opportunity for DFWP to trial pilot breeding techniques that would be critical for the successful re-introduction of species or in-the-field application.

A number of DFWP species including Lumholtz’s Tree Kangaroo, Greater Bilby and Mahogany Glider, Cassowary, Bridled Nailtail Wallabies, Julia Creek Dunnarts, and Brolgas all have lead contacts in a range of establishments across Queensland and Australia.

Commenting solely from a visitor attraction perspective, if managed appropriately these programs have the potential to add significantly to DFWP’s appeal, providing a number of benefits:

- They provide the opportunity to promote conservation and State Government objectives and its conservation, environment and heritage achievements
- These programs are essential for authenticity and help in creating points of differentiation
- Provide a range of cost effective marketing opportunities to promote DFWP and “reason for being” – media and profile opportunities, adopt programs, donation opportunities, opportunities to partner/collaborate with corporates and Universities etc.
- Staff engagement and satisfaction, promoting positive culture
- As per the considerations for acquiring any new species, decisions must be based on clear rationale, objectives and projected outcomes via a species management plan.

From a visitor attraction perspective, it is recommended that 2-3 key captive breeding and recovery/ research programs with clear plans and targeted conservation outcomes be established.
PERFORMANCE OBJECTIVES

The remit of this project was to focus on developing a master-planned vision; however, provisional recommendations on performance objectives are necessary to provide a practical grounding.

In balancing the potential of the Park and the policy and funding climate that it operates within, it is recommended that strategic objectives and performance targets should incorporate a range of visitation, revenue, education, yields, marketing, environment and community outcomes. Financial performance targets on their own are not appropriate measures for DFWP.

To be effective, objectives will need to be SMART;

A key element of the masterplanning preparation process is in developing an understanding of the projected financial impact of proposed development.

Detailed financial projections including revenue and costs streams are not able to be published as they are commercial in confidence.

However, projections of forecast performance have been undertaken to inform the master planning process. In analysing forecast future performance, the importance of establishing a strategic direction (supported by appropriate development and investment) which results in the gap between the Park’s revenue and costs being reduced are recognised.

2020 OBJECTIVES

The following objectives are recommended for the Park by 2020;

- Grow visitor numbers to a target of 50,000
- School Groups: grow school numbers to 20,000
- Deliver an established gateway function for QPWS, growing awareness of the Service’s State-wide parks and wildlife assets among target visitor audiences (including local communities)
- Learning outcomes and engaged visitors - create visitor satisfaction baseline (defined in the business planning following agreement of the master plan) and grow performance levels to 90% visitor satisfaction rate
- Supportive and engaged partners – encouraging stakeholder investment in collaborative projects and programs, of up to $300,000 per annum
- Grow average length of stay by 20% from current baseline (defined in the business planning following agreement of the master plan)
- Grow average visitor expenditure in the Park by 20% from current baseline (defined in the business planning following agreement of the master plan)
- Reach industry averages for admission, retail and food and beverage yields
- Costs as a proportion of overall turnover will be reduced through partnerships, with a goal of reaching 60% of cost accounted for through revenue, leaving a 40% community service obligation (to be fully defined in the business planning following agreement of the master plan)
- Increase local visitation – attract at least 15,000 local visitors annually.

CONTEXT: GLOBAL AND NATIONAL TRENDS

- Australia has an ageing population
- Change in spending patterns – bargain-hunters
- Change in spending patterns: trading up
- Consumers are searching for health and wellbeing experiences as part of their holiday plans
- A greater desire for personalisation of the experience
- A desire for sustainable tourism
- That word of mouth is about the experience not the product.
These objectives should be treated as indicative targets, based on the research carried out during the draft master plan preparation process. Additional analysis on the preferred development options will be necessary prior to pressure testing and firming up. However, based on the information available, it is felt that this set of objectives provides an achievable, albeit stretching set of performance targets across an appropriate range of visitor, financial and community areas.

To ensure strategic directions remain pertinent and on target, annual business plans should set performance targets within the context of these 2020 objectives.

Provided that recommended investment and action takes place in the suggested time periods, and overall market performance continues as per forecasts, analysis suggests that once re-established in the market, reaching 30,000 visits is a realistic ambition within 3 years of re-launching.

Achieving a set of objectives which deliver a good value return for approach in terms of strategic direction, management and implementation.

Objectives are:

- Maximise value and return from assets
- Rationalise resources/control costs - engaging in partnerships (including commercial, community and conservation partners) will be a key avenue for cost reduction and delivering measurable outcomes
- Links fully developed with Tallebudgera ARC and Beach School
- Appointment of experienced attraction centre manager, qualified education officer and skilled and experienced marketing resource.
- Flexibility for centre manger to innovate and make business decisions within specific governance guidelines
- Flexibility for marketing resource to promote Fleays
- The level and type of engagement required to deliver public service and visitation outcomes
- Consistent, targeted and innovative marketing
- Species Management Plan
- Conservation and Environment plans
- Asset Management Plans
- Business continuity and disaster recovery programs.

PARTNERSHIP APPROACH

It was noted in the previous section that with a clear vision and focus, it is achievable for the Park to deliver a set of “good value for money” outcomes, however attaining or working towards a break-even position will be extremely difficult where Government retains a direct delivery role and where commitment to longer term capital and operational funding is limited. Similarly, a commitment to an approach which tempers meeting visitor expectations on interactive experiences with conservation-led approaches is also likely to place some limits on revenue generation and visitation.

A key benefit of a statutory board model (subject to governance model) is the ability to engage in partnerships as a means of increasing revenues and reducing costs i.e.

To Grow Visitation (and revenue)
- New services developed in partnership with commercial, community and conservation partners

To Reduce Costs
- Using partnerships as a means of reducing costs via alternative means of delivery, cost-sharing and efficient sourcing of supplies
MARKET POSITIONING

Section 6

- A refocused Vision for DFWP - Where do we want to be by 2020?
- Target Markets
- Market Positioning of DFWP
- Standing out from the Crowd: DFWP’s Differentiators
- Hero Experiences
- Strategic Fit of Product/Experience Development with Target Markets
- Networking and Advocacy
- Marketing and Networking Imperatives
TARGET MARKETS

Part 1 of the master plan sets out a comprehensive market review, incorporating:

- A review of the Park’s current visitor markets;
- The overall markets in the Gold Coast and for wildlife-based attractions;
- Competitor analysis; and
- The implications of forecast overall tourism market growth and key market trends.

Key elements of the vision for DFWP are to deliver increased visitation levels and growth in revenue streams and yields. In order to deliver on these strategic ambitions, a clear view on target markets is essential – experiences and supporting product development and marketing being informed by target market characteristics and expectations.

Further considerations in identifying target markets are:

- Being clear on how growth will be achieved;
  - Attracting new visitors
  - Retaining and growing expenditure and average length of stay
- The natural characteristics of the site – appeal, appearance, location;
- Site constraints - size, natural capacity etc.

Given this analysis, it is recommended that target markets for the Park should be;

TIER 1

1. Student/Education Groups – Targeting Tallebudgera Recreation Centre and Beach School, and local schools (primary)
   - All schools within 30km radius;
   - Grades 1-3 (fits with current school curriculums);
   - Tallebudgera ARC school markets (older age groups);
   - Development of indigenous educational products which meet national curriculum for grade 9;
2. Parents and grandparents with young children aged less than 10 years;
3. Local Gold Coast residents with visiting friends and relatives
4. Domestic (including grey nomads) (interstate and intrastate), including day tour companies, bus companies, inbound operators) – connecting with the Gold Coast’s leisure tourism market;
5. Domestic specific interest groups including Probus, Rotary, Lions, garden clubs etc.; and

TIER 2

6. International markets (if product can be improved and maintained consistently).

The top four tier 1 targets are well positioned in terms of growth prospects and demographic forecasts. Particularly relevant considerations are;

- Forecast population growth in South East Queensland, including growth in school-age population; and
- Target growth for tourism expenditure in Queensland to double by 2020 (Deloitte Access Economics). For the Gold Coast this equates to 7.1% average annual growth rate to reach expenditure of $7 billion by 2020.
MARKET POSITIONING OF DFWP

The draft master plan sets out a Vision for DFWP and where the Park can differentiate itself from competitors. This positioning is crucial if DFWP is to succeed in meeting its objectives.

Given Government’s commitment to maintaining a conservation-led approach to management of the Park, DFWP needs to make a virtue of its attributes and positioning. That is, provide visitors with unique, interactive edu-tainment experiences where they have fun and learn about our native wildlife at the same time. If visitors are left to their own devices to walk around the Park without a program of interactive experiences and set-piece shows, then the experience will be over in 30-45 minutes.

1. DFWP should be a fun experience for families where they can spend at least 2-3 hours, enjoy the exhibits and go to the free flight bird show, croc show, small animal show, and snake show – all for around $25 per adult and half price for children.

2. From a visitor attraction perspective, the Park should strive to become a great half day’s family entertainment for young families at good value which offers something different from other attractions.

3. DFWP will be an exemplar of a modern wildlife centre within the context of Queensland’s National Parks, applying leading practice methods in native animal conservation, and explaining why it is best to take this approach, while providing customers with an up close and personal, and entertaining experience.

STANDING OUT FROM THE CROWD: DFWP’S DIFFERENTIATORS

DFWP’s unique selling proposition is in ranger-led experiences and edu-tainment, comprising:

- Strong curriculum links,
- University and community partnerships,
- A conservation flavour, but hands-on experiences which builds an emotional attachment for visitors,
- Retains Fleay’s focus - getting people up close and personal to give them an experience to remember (and learn from it).

Building on these themes, differentiators for the Park can involve;

- Providing a gateway to national parks in the region and more generally about conservation activities in national parks across Queensland
- Quality of education/ edu-tainment
- Volunteer Focus
- All about engaging and creating emotional attachment - providing lasting memories and repeat visits
- ‘Ranger School’ – a focus on education.

A potentially significant differentiator for DFWP could also be the running of a small number of research/endangered species programs on site. These types of programs provide the Park with a degree of authenticity, provide an opportunity to promote Government’s work, and best of all, it provides an opportunity for breeding endangered species and also to market this research for substantial media opportunities.

From a visitor attraction perspective, appropriate research programs would add to the Park’s appeal. However, it is recognised that clarity on the applicability of on-site breeding/endangered species programs at DFWP need to be addressed.
HERO EXPERIENCES

A tourism ‘experience’ is the emotional feeling or personal achievement a visitor derives from the purchase, participation or consumption of a tourism product – accommodation, attractions or tours. The ‘tourism product’ is what the visitor buys; the ‘tourism experience’ is what they remember.

What are ‘Hero Experiences’?

Hero experiences are those world class iconic experiences that: provide a destination with a real competitive advantage over other destinations, focus on what is truly unique or memorable or engaging about a destination, and meets the needs of identified target markets.

At present, a hero experience does not stand out for DFWP.

For the Gold Coast as a destination its vision is;

“By 2020 the Gold Coast will be globally recognised as a world-class leisure and business events destination famous for its unrivalled variety of entertainment, excitement and fun.”

While the experience provided at DFWP is distinct from many of those on offer elsewhere on the Gold Coast, its proposition does fit within the hinterland theme;

“Escape and feel revitalised as you search for hidden treasures in the villages and World Heritage-listed rainforests of the Gold Coast Hinterland.”

Supporting Attributes and Potential Clusters:

- Day or night tour operators, hinterland retreats, boutiques and local produce operators

The next stage for a business or tourism experience is developing or establishing their own signature experiences underneath the destination framework. The signature experience is the moment that an organisation delivers to its customers that is most memorable, sets you apart from your competitors and creates a story that visitors will share with others. To be a ‘signature’, it should link to a theme that is part of your organisational culture and part of what is delivered every day.

As part of the preparation of a marketing plan, it is recommended that DFWP establishes its signature experience and makes this central to its marketing efforts.

The Vision for the Park is largely based on making a virtue out of what DFWP is all about, and strengthening its links with National Parks by developing it as a ‘gateway’ centre to wildlife in National Parks and other conservation activities.

Provide visitors with unique, interactive edu-tainment experiences where they have fun and learn about our native wildlife at the same time.

In practical terms – the stars of the show are the animals. Initial research suggests strength in the following areas which offer potential for development;

- DFWP is already synonymous with the platypus
- Establishing a new free flight bird show featuring Wedge-tailed eagles can add a new hero
- Establishing a butterfly house which features the Richmond Birdwing butterfly
- The special service and skills of Ranger-led edu-tainment
- Behind the scenes tours.
STRATEGIC FIT OF PRODUCT/EXPERIENCE DEVELOPMENT WITH TARGET MARKETS

Analysis of the market and competitor positioning demonstrates that product and experience development will need to display a range of characteristics in order to meet the needs of these markets.

Key considerations for product and experience development include:

- Creating unique, fun, educational and interactive experiences for visitors which promote our natural heritage and environment.
- Natural habitats (authentic, quality), no barriers, immersion in variety of habitats.
- Interactive, close, stimulating connections with animals.
- New exhibits, shows and programs which are regularly refreshed.
- Behind the scenes experiences.
- Unique, special experiences.
- Educating our youth with structured programs which are directly related to the curriculum.
- Seeing animals in authentic and a variety of natural habitats.
- Being affordable and entertaining for families where they can also learn - “value for money”.
- Being easily accessible with good parking.
- Clean, pleasant, for all ages.
- Where “specific research” is carried out to support our local native endangered species.
- Where the average length of stay is at least 2 ½ hours.

Investment and product/experience development are driven by these target markets and meeting with and exceeding their expectations.

To increase length of stay (which is a key driver of visitor expenditure), visitors need to be entertained and we need to create “emotion” with the experience. They also need to be immersed in what they are learning and the attraction needs to be authentic.

MARKETING PRIORITIES: OVERVIEW

The decline in visitor numbers and lack of marketing was considered by consultants to be a major weakness identified in the review.

Although only one factor, decreasing investment in marketing of the Park mirrors the falls in visitation and revenue over the last decade.

The Park’s marketing budget has decreased from $71,500 in 2002/3 to “no budget” being identified for the current financial year.

Historically the Park also had a dedicated marketing/education officer, which is no longer the case.

While recognising that economies in public sector investment have needed to be made, lack of market profile has clearly been a key factor in declining performance.

Without dedicated marketing investment and activity to accompany capital investment in developing the product and experiences on offer, the Park will not deliver its vision.

Re-launching the site after the proposed stage 1 investment provides the perfect opportunity to re-establish the park among trade and consumer audiences.

The master plan is not the appropriate place to determine the detail of marketing development, but it is important to highlight key considerations and deliverables.
NETWORKING AND ADVOCACY

Networking and advocacy are key elements of overall communication - without being active in these areas, it is easy for a business to slip off the radar and be forgotten.

DFWP has not been active in engaging with regional and State tourism networks and organisations in recent times – these networks are important in terms of awareness of competitor activity, best practice and market trends, in addition to marketing and partnership opportunities.

Advocacy for the Park is also a key consideration in terms of keeping it on the radar – whether this is orientated towards key stakeholders (current funders, politicians), potential funders (sponsors), or community partners. Ideally, the organisation should have a network of well-placed and influential ambassadors who perform this role - in practice these individuals are often part of Foundations or 'Friends' groups.

MARKETING AND NETWORKING IMPERATIVES

In order to re-establish the Park in visitor and community eyes, a dedicated marketing program is essential as an element of stage 1 master plan implementation. Indeed, many of the identified actions should be implemented immediately.

Priorities include:

- Identifying a ring-fenced annual marketing allocation within the Park’s operations budget
- Preparation of a marketing plan as a priority alongside the business plan
- Identify dedicated staff resources to lead marketing activity - without dedicated resource, implementation is unlikely to maximise returns. Via contract or a staff member, key elements of a job/task specification include;
- Promoting the park to target markets
- Developing sales collateral including new products such as “Behind the Scenes Tours”
- Developing Media partnerships with digital, print, TV and radio (including Govt. media unit)
- Developing calendar of events and promotions – promoting the brand and specific targeted marketing
- Marketing to wholesale market – day tour companies, inbound operators, domestic groups such as Rotary, Lions, Probus groups
- Developing partnerships with other state Govt. Departments to promote in collaboration
- Introducing discounted “VIP passes” which encourage local community to support at affordable prices. Also encourages them to bring visiting friends and relatives. This would be undertaken by mail out with fridge magnets with a “call to action” to visit Fleays
- In coordination with qualified teacher, develop sales collateral for schools to encourage them to visit for national curriculum products
- Maintaining directional and promotional signage
- Website promotional updates
- Tourism industry liaison with organisations such as Gold Coast Tourism, QTCIC, and TQ
- Press releases and media liaison
- Re-engage in regional and state tourism networks where appropriate – Tourism Queensland and Gold Coast Tourism
- As part of communication activity, identify at least one advocate who is well placed to support the park in liaising with key stakeholders. Advocacy should be integrated as one element of overall communications and marketing activity.
MARKETING INVESTMENT FOCUS

Investment of marketing budgets should reflect priority markets;

1. Student/Education Groups – Targeting Tallebudgera Recreation Centre and Beach School, and local schools (primary)
   - All schools within 30km radius
   - Grades 1-3 (fits with current school curriculums)
   - Tallebudgera ARC school markets (older age groups)
   - Development of indigenous educational products which meet national curriculum for grade 9
2. Parents and grandparents with young children aged less than 10 years
3. Local Gold Coast residents with visiting friends and relatives
4. Domestic (including grey nomads) (interstate and intrastate) (including day tour companies, bus companies, inbound operators) – connecting with the Gold Coast’s leisure tourism market
5. Domestic specific interest groups including Probus, Rotary, Lions, garden clubs etc.
Section 7

GOVERNANCE AND OPERATION

- Governance
- Governance Models: Options
- Recommended Governance Model
- Establishing a Foundation
- Volunteer Program and Management
- Business Processes:
  - DFWP Cost Reporting and Management
GOVERNANCE

The review of the Park’s operation highlighted a number of challenges and impediments to achieving the vision with the current governance arrangements, including;

- Regulated fees limit flexibility for Park managers to vary pricing and incentives to respond to market opportunities
- Revenue generated on the site is not hypothecated and is not available for re-investment
- Costs are regionalised and not measured to DFWP cost centres, making cost control, analysis and review problematic
- Management by State Government limits the entrepreneurial flexibility required to thrive in a competitive environment
- Management resources and skills which enable the Park to be run on a more ‘commercial footing’ are required. Visitor attraction management skills are needed to manage the facility and deliver a marketing program, ensuring the Park is an active participant in local tourism networks, and has a strong visitor experience focus
- Responsibility for aspects of conservation, sport and recreation and threatened species breeding programs are divided across Government departments resulting in changes of policy focus, impacting directly on the Park’s operation
- Current arrangements stifle the ability to form commercial partnerships that could reduce operating costs by up to 20%.

Governance arrangements should allow the Centre Management team the flexibility to manage, invest and innovate, while incorporating appropriate safeguards for public investment.

It is clear that if DFWP is to increase visitor numbers and compete in the highly competitive Gold Coast visitor attractions market, the organisation will need to become more proactive in product development and sales and marketing to potential visitors and be more attuned to market needs. Experience from peer group venues indicates that delegated authority/arm’s length operation and management from public sector ownership and control is a significant aid to delivering objectives.

Key Issues for Informing a Business Model

The governance model is simply a means to an end - key elements to consider include;

- Establishing a statutory board with decision-making authority
- Appointing a Centre Manager/ CEO position with the appropriate skillsets and experience – covering business management, visitor attractions, and commercial acumen
- Operational control and delegated authority to make investment decisions
- Clear lines of reporting and authority
- Ability to enter into commercial partnership arrangements
- Ability to take a commercial/entrepreneurial approach to delivery.

The review of the Park’s operation, and comparison with best practice examples in the market demonstrated that a commercially focused governance model is required in order for the Park to deliver on its strategic ambitions. Establishing these governance arrangements is one of the key enablers for success. Structuring the organisation in a way that is most likely to assist it to achieve its objectives is a commonly accepted proposition i.e. form follows function.
GOVERNANCE MODELS: OPTIONS

There are a number of models which have been widely used in other Australian states by Governments:

- Statutory Board Model
- CEO/ Centre Manager with an Advisory Board
- Hybrid Models.

STATUTORY BOARD MODEL

The Statutory Board model would allow the organisation to operate under an independent Board who would be appointed by the State Government, with an independent chair and a seat for a QPWS representative. Its size will normally be between 3-7 members, depending on the skills and needs of the organisation.

Statutory Boards are in a position to undertake a number of roles including commercial operations, regulation and the provision of Government services, with delegated authority largely established through enabling legislation. The opportunity for ministerial involvement in the governance arrangements of statutory authorities varies greatly.

A Statutory Board offers the opportunity to create efficiency and independence to enable a revitalized approach to undertake functions such as commercial arrangements which are better achieved with a level of separation from outside the broader portfolio department.

Given that the DFWP’s business does include activities that are (or should be) commercial in nature, the Statutory Board will need relevant powers and delegations and should operate under a Board that offers entrepreneurial skill, objectivity and knowledge gained through appropriate experience.

CEO WITH AN ADVISORY BOARD MODEL

Under Advisory Board Model, the CEO/Centre Manager is responsible for implementation of a Charter and QPWS would appoint an Advisory Board who he or she could call when there are specific requirements or needs for advice or information on an as needs basis. Under this scenario, the State Government maintains a higher degree of control over the organisation. Clearly the role of an “Advisory Board” vs. a “Statutory Board” is also far less onerous for those members.

HYBRID MODELS

Additional hybrid governance models with varying levels of direct/arms-length management are also commonly used, including:

Leadership via Business Manager or Centre Manager
- Delegated powers to manage the site/attraction
- Typically reports to Government Director/Director General
- Stakeholders engaged/support provided by an Advisory board
- Fixed term funding allocation (capex and opex)
- Product/venue delivered as controlled assets

Business unit within Government Department
- Commonly will manage a number of sites
- Direct management by Government
- Ability to establish joint ventures
- Co-ordination/funding/management by Government executive team

With the exception of the business unit model, the CEO/Centre Manager is responsible for the day to day operations of the organisation, however under the Statutory Board model, he/she would report directly to that Board. Under the CEO/hybrid model, he/she reports directly to the State Government.
ADVANTAGES OF THE STATUTORY BOARD MODEL

- Allows greater independence to operate, with Board members having a wide range of skills necessary to maintain and enhance the organisation.
- Skills such as marketing, local community and commercial business skills of operating an attraction may not readily be available within State Government.
- Allows for quick decision making
- Enable partnerships to be formed with commercial, community and conservation stakeholders

DISADVANTAGES OF THE STATUTORY BOARD MODEL

- State Government does not have direct control on a day to day basis of the organisation and it must rely on integrity of the Statutory Board and decision making by them. These decisions may not always align directly with Government vision and policy direction, and cause potential conflicts.
- Government is bound by the Charter and normally will only be able to change Board membership when tenure expires.
- Cost – Board members will usually be paid between $7-$15,000 p.a. and any outlays such as travel. In addition, it normally requires a separate accounting and reporting function

RECOMMENDED GOVERNANCE MODEL

A Statutory Board with strong governance will usually outweigh any disadvantages, and provide flexibility to operate and compete in the open marketplace. While it is understood that Government’s appetite for establishing new statutory boards may be limited, it is considered that a Statutory Board approach will maximise opportunities to achieve the Park’s vision and performance target. It is recommended that;

- A Statutory Board is established and that a centre manager is appointed
- That the approach should be developed as a pilot governance model to be reviewed after 2 years
- Key requirements, alongside safeguards on public investment include; hypothecation of generated revenues, delegated authority for centre manager to invest, manage and act an entrepreneurial approach to running the park as a visitor attraction, ability to market and enter commercial agreements, and clarity/commitment on Government investment over the defined business plan period

We understand that governance has also been an issue raised in the master-planning exercises for Brisbane Forest Park and Mon Repos. It is recognised that establishing a statutory board for one relatively small facility would be quite resource intensive when viewed against outcomes/scale of facility. An option which could also be considered is establishing one Statutory Board for all three gateway park locations.

IMPLEMENTATION OF PREFERRED GOVERNANCE MODEL

The success of a Statutory Board is dependent on a clearly defined Board Charter of Corporate Governance as to its vision, goals and clear direction. It is also dependent on Board members’ varied and professional skills in areas such as governance, community, marketing, accounting, and wildlife management.
BOARD CHARTER

A Board charter will usually include some or all of the following elements;

- Defining the roles, responsibilities and functions of the Board of Management – To set the strategic directions, establish policies and procedures, to govern the affairs and activities of the organisation including preparation of strategic and business plans, and monitoring of performance of the organisation against KPI’s;
- Ensuring that organisational strategies and plans align with Government policies and objectives including risk management strategies;
- Operations of the organisation within approved capital and operational budgets;
- Roles and responsibilities of Board members and the CEO; and
- A “Code of Conduct” and expected conduct by Board members at meetings.

Key considerations include;

- Clear and transparent lines of accountability;
- Clear understanding of roles;
- Clearly articulated objectives and strategies; and
- A management structure that is accountable for its performance.

Board members would be appointed by the State Government for up to 3 years and skill requirements would be dependent on the needs of the organisation. They may be re-elected for a further period by mutual agreement. In the case of DFWP, it would be vital to have Board members with accounting skills (for development of risk management plans, accounting, audit, system controls and procedures), sales and marketing (for communication with internal and external stakeholders), community and wildlife management (including animal ethics). Membership could include; Queensland Parks; Tourism industry, Conservation, Local community and Business representatives.

ESTABLISHING A FOUNDATION

In addition to the recommendation for Advisory Board appointment, it may also be appropriate to consider commencement of a Not for Profit Foundation. Whilst there are some initial statutory/regulatory costs to set up, this has proved to be a good revenue raiser for worthwhile causes. Phillip Island Nature Park (PINP) has raised over $1.3m over the last 4 years and has built a new wildlife hospital with sufficient yearly operational funding and has funded many research programs.

Normally an unlisted public company limited by guarantee is responsible for a foundation with “deductible gift recipient status”. This allows tax deductions for donations to be received by donors – corporate and public. The majority of the Foundation Board needs to be independent of any operations at Fleays. The charter of the foundation will determine where and how funds can be directed.

In practice, fund raising is often coordinated by marketing staff within those organisations as part of their usual calendar of events. It is an excellent, cost effective way to promote a park and conservation works research being undertaken.

The Board of the Foundation will meet on regular occasions to determine how those remaining funds will be donated will be allocated. It would also be the norm that the host organisation would be invited to lodge submissions with the Foundation to fund worthy causes, as well as perhaps some educational/research institutions.
FRIENDS OF FLEAYS

“Friends of Fleays” is a long established organisation, which supports the Park from fundraising, volunteering and advocacy perspectives. Consultants understand that Friends of Fleays as an organisation which currently benefits from having deductible gift recipient status. Deductible gift recipient status is important both from a financial perspective and in terms of status in terms of being well placed to generate support for community activities.

Recommendations

- That the merits of establishing a foundation alongside new governance arrangements are investigated fully as an element of implementing new governance arrangements;
- Discussions be undertaken with Friends of Fleays regarding their aspirations and potential interest in helping to shape a new or evolved foundation for DFWP; and
- In the short term, if a marketing representative is appointed at DFWP, it is recommended that Friends of Fleays be involved in developing a calendar of events/activities for fund raising.

VOLUNTEER PROGRAM AND MANAGEMENT

A thriving and well organised volunteer program is a common factor in most successful visitor attractions/wildlife parks.

At present;

- Friends of Fleays provide volunteering support for the Park
- QPWS operate a distinct volunteering program for the Park
- Volunteering on-site is co-ordinated by the Park’s Managers and by Friends of Fleays
- Gold Coast Volunteering is also a very active volunteering organisation in the local area

A number of issues need to be considered in relation to volunteering;

- The future vision for DFWP sets a course for more active enjoyment of the park and interaction with animals by visitors. Delivering these experiences can be labour-intensive, therefore an active volunteering program is a key element of the delivery model
- Friends of Fleays are a long established organisation who provide valuable volunteering support to the Park, however it is understood that ‘Friends’ as an organisation has been decreasing in numbers in recent years
- From a management perspective, managing and co-ordinating volunteer programs can be time-intensive - it is important that co-ordination and management processes are fit for purpose to ensure the Park maximises the available support. Within overall management resources, management of volunteers should be part of the core remit
- There potentially is a degree of overlap and added management time generated between the volunteering organisations currently in place

Recommendations

As part of the delivery model for the Park, undertake a review of the current volunteering programs – their resources, potential, management requirements and aspirations, with a view towards establishing a single volunteering program which meets with all stakeholders’ priorities.
BUSINESS PROCESSES

PRICING

Based on market and competitor analysis, research indicates that current adult entry pricing is not unreasonable compared to other similar wildlife attractions and comparing average length of stay. There are however restrictions on pricing and product flexibility for new tours and also lack of flexibility for wholesale pricing and the ability to discount for groups/volume. This will need to be addressed urgently if Fleays wishes to attract greater visitation levels.

Table 8: Pricing and Visitor Attraction Yield Comparison

<table>
<thead>
<tr>
<th></th>
<th>DFWP</th>
<th>Industry average for 1-2 hour park</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current adult entry price</td>
<td>$19.45</td>
<td>$20 - $25</td>
</tr>
<tr>
<td>Average admission yields</td>
<td>$10.72</td>
<td>$12 - $15</td>
</tr>
<tr>
<td>Average Retail Yields</td>
<td>$0.74</td>
<td>$2.50 - $3.00</td>
</tr>
<tr>
<td>F&amp;B yields</td>
<td>$3.51</td>
<td>$4.50 - $5.50</td>
</tr>
<tr>
<td>Total</td>
<td>$14.96</td>
<td>$17.00 - $23.50</td>
</tr>
</tbody>
</table>

Note – expenditure at individual attractions will vary, dependent on the visitor mix – adults, families, education, nos. of domestic vs. international visitors (who generally pay different rates) and climate (the colder the climate, the greater the visitor spend) etc. DFWP’s lower yields also reflect the relatively large proportion of school groups currently visiting.

Whilst adult price appears reasonable for average length of stay, average admission, retail and food and beverage yields are well below industry standards at present.

While related to elements of product and experience development, a number of initial “pricing opportunities” are available to increase adult visitation (to increase average yields), including:

- Introduce premium tours and products (such as MP4 players, animal feeding, behind the scenes tours etc.
- Introduce new educational tours and products with differentiated pricing – e.g. with and without a ranger, animal feeding, kayak + guided tour, separate pricing for large school groups, separate pricing for wholesalers and day tour companies etc.

REVENUE GENERATION

Revenue generating and services should be considered as an element of overall business planning. Increasing revenues is one of the objectives which will enable delivery of the Park’s overall vision.

The business plan will set visitor numbers, projected revenue and yield targets, and identify the means and approach to deliver. From review of the Park’s operation and peer group visitor attractions, a number of initial opportunities are apparent, including:

- Consider free entry for children (who are accompanied by at least one paying adult on weekends and school holidays). If elements of free entry to boost visitation is considered as an option, further sensitivity analysis is required to enable cost/benefit to be determined;

Recommendations

- From a policy perspective, new governance arrangements should as a matter of urgency remove the restrictions placed by regulated entry fees, to enable Park Management to have a flexible approach to pricing; and
- A pricing strategy should be developed as part of the Park’s business plan – reflecting market and competitor positions.
• Introduce behind the scenes tours and have volunteers coordinate with staff – e.g. Zoos Victoria and San Diego Zoo models;

• Remove walls to café and introduce Gift shop with unique and standard gift products. Opportunity to also promote indigenous cultural product and local artists;

• Increasing the café space and opening up walls in visitor centre will also provide greater opportunities for events, weddings; functions etc. and make it more attractive to a proposed lease/external caterer;

• Opportunities for photography revenue stream with more “show content”;

• Opportunity to sell feed for animals such as kangaroos, turtles, eels, ducks etc. increase visitor experiences and also to obtain some reimbursement for expensive feed and chaff costs. It should also help to minimise “unnatural or unwanted” feed by visitors;

• Introduce “locals VIP pass” as fridge magnets. It profiles Fleays, increases revenue from locals and embraces local community. It should also increase visitor numbers in “Visiting Friends and Relatives market”; and

• Penny press machines with unique Fleays engraving.

In terms of the opportunities to engage partners to deliver products and services via expressions of interest (EOIs) and raise revenue from them, research suggests that the current low level of visitation makes promotion of opportunities challenging at this stage. The draft master plan identifies a number of development opportunities which would be most appropriately delivered via EOIs and potential revenue/risk sharing arrangements. Research suggests that these opportunities and concepts should be firmed up and developed but that are likely to achieve more success when the Park has benefited from initial investment and re-established itself in the marketplace.

**DFWP COST REPORTING AND MANAGEMENT**

Cost control and monitoring is an essential part of any business operation. At present, a number of cost centres are regionalised, making determination of a clear picture on profit/loss problematic.

**Recommendations**

- The new governance model should as a priority provide for clear hypothecation of business costs, as the basis for financial planning;

- In line with future strategies and direction of the Park, a full review of operational costs should be undertaken; and

- Introduce reporting systems for accountability, trends, budgeting and asset management. This includes a ticketing system that records demographics and allocation of expenses. For example at present, staff does not have a system for accurately determining visitor origin or yields.