

Submission to the Economics and Governance Committee

Inquiry into prehistoric, dinosaur and paleo tourism in Outback Queensland.

Department of Tourism, Innovation and Sport  
Tourism and Events Queensland

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## SUMMARY

1. Outback Queensland has a unique opportunity to grow its tourism economy by consolidating the region behind the unique selling proposition of dinosaurs, complementing its existing tourism appeal.
2. In research commissioned by Tourism and Events Queensland (TEQ) in 2022, dinosaur tourism was identified as a growing tourism niche across the globe, whereby dinosaur fossil sites were transformed into geo-tourism destinations through open-air or field museums, interpretive centres, local museums, or paleontological parks.
3. TEQ continues to work directly with the Outback dinosaur industry to assist in the delivery of actions under the Outback Queensland Dinosaur Roadmap. TEQ acts in an advisory capacity to assist with the development of committee set-up, ongoing governance and experience development opportunities for dinosaurs.

## KEY POINTS

### Dinosaur and paleo tourism overview

4. Dinosaur tourism in Outback Queensland is represented by 10 main dinosaur (fossil, megafauna, marine) attractions that are dispersed evenly throughout the destination and represent 26 percent of all leisure travel to the region (41 percent excluding travellers with the primary reason of visiting friends and relatives).
5. Research commissioned by TEQ in 2022, undertaken by the AEC Group on the Value of Dinosaur Tourism (summary provided at **Attachment 1**), highlighted for the year ending June 2021 that Outback Queensland dinosaur tourism attractions accounted for an estimated 11 percent of all visitors in the region, equivalent to approximately 134,400 visitors in the period.
6. The 2022 AEC Group research also found that the direct and indirect impact generated by visitors attending dinosaur tourism attractions in 2020-21 was \$36.8 million, which provided for 612 full-time equivalent (FTE) jobs. The future potential for dinosaur tourism, in both direct and indirect impact, is estimated to more than double over the next fifteen years (to 2035-36), generating to \$82.7 million and supporting 1,373 FTEs.
7. This level of visitation contributes to broader tourism and economic activity across the region. Dinosaur tourism is estimated to account for approximately 17.6 percent of Gross Regional Product (GRP) generated by the tourism sector in Outback Queensland and 18.9 percent of tourism employment, including both direct and flow on activity in the year ending June 2021.
8. Dinosaur tourism attractions are an economic enabler for the Outback region, with visitors spending more than seven times what they spend at the attraction in the local economy before and after their visit to the attraction.

9. Research conducted by The Lab in 2022 (summary provided at **Attachment 2**), commissioned by TEQ, indicated that dinosaurs are non-generation specific and ever-present in their appeal to consumers. Delivering the fantasy, curiosity and scientific reality that connects to human nature.
10. The Lab research indicated the domestic market represented the strongest opportunity for dinosaur tourism in the Outback, in particular young families, grey nomads and dinosaur enthusiasts.
11. For context, domestic visitors accounted for 97.8 percent of overnight visitation to the Outback pre-COVID-19, in the year ending December 2019. In the year ending June 2023, domestic visitors accounted for 98.6 percent of overnight visitation to the Outback with international recovery ongoing.
12. Young families were identified as the prime potential market for Outback Queensland's dinosaur tourism offering through The Lab's research. The potential for this market is high, with young families with children aged seven to 12 years being a key finding.
13. Although young families make up the bulk of the dinosaur tourism opportunity, young travellers and grey nomads (55-plus years) see the potential in Outback Queensland's dinosaur experiences, however, as a side adventure rather than a primary driver.
14. Dinosaur enthusiasts are those with a strong interest in dinosaurs; it is a core hobby and passion. This group are interested in world-class dinosaur tourism experiences that offer the chance to unearth discoveries and continue to actively learn more about their passion for palaeontology.

#### Queensland Government funding and roadmap

15. On 2 May 2021, the Premier and then Minister for Trade, launched the Outback Queensland Dinosaur Roadmap (the Roadmap) to grow dinosaur tourism in Outback Queensland. The three-year, \$500,000 investment was made possible through joint funding from the Department of the Premier and Cabinet (DPC) and TEQ.
16. Funding from DPC's Year of Outback Tourism, which was unspent due to the impacts of COVID-19, was reallocated to deliver actions from within the Roadmap. The funding will be used to deliver a range of actions under a strategy led by the Dinosaur Tourism Collective (DTC) to promote Outback Queensland as one of the world's leading dinosaur tourism destinations, tying together the success of attractions such as the Eromanga Natural History Museum, Riversleigh Fossil Centre Mount Isa, Kronosaurus Korner, and Flinders Discovery Centre.
17. The Roadmap lays out the foundation for Outback Queensland to grow its tourism economy by consolidating behind the unique selling proposition of dinosaurs, complementing its existing tourism appeal of heritage, wide open spaces, dark skies and outback hospitality.
18. In 2021-22, one of the key actions of the Roadmap, was the establishment of an interim Dinosaur Tourism Advisory Panel which, in turn established the DTC.
19. The DTC was officially formed in June 2023 and consists of an independent Chairperson, a program manager and the following four dinosaur experiences who were accepted into the collective via an expression of interest process:
  - Eromanga Natural History Museum
  - Kronosaurus Korner
  - Flinders Discovery Centre
  - Outback at Isa – Riversleigh Fossil Discovery Centre.
20. The expression of interest process for DTC was available to all Outback Queensland dinosaur experiences that achieved the below criteria:
  - Are a Best of Queensland Experience (BOQE).

- Have achieved a BOQE Global Review Index (GRI) of over 88 percent in the 2021 round of the BOQE Program.
  - Are Domestic and/or International Market Ready.
21. The DTC will lead and facilitate broader global reach of outback Queensland's dinosaur tourism experiences by:
- stewarding the Roadmap;
  - finding efficiencies through collaboration;
  - creating global partnerships;
  - defining the value of Dinosaur Tourism; and
  - increasing investment in dinosaur experiences that grow tourism.
22. As an industry-led body, the DTC is designed to be the catalyst for tourism growth and will also ensure long term development by identifying and securing multiple options to ensure funding sustainability is met within three years of inception. This can include, but is not limited to:
- industry financial investment;
  - commercial merchandise arrangements;
  - ticketing and booking systems;
  - philanthropic donations; and
  - private enterprise investment and donations.
23. A further action of the Roadmap was the commissioning of research to determine the Global Value of dinosaur tourism including a Dinosaur Tourism Insights study. As discussed above, a summary of the research is available at **Attachment 1** and **Attachment 2**.
24. Since 2016-17, TEQ has expended \$842,000 on activity to specifically support dinosaur and palaeo related experiences including understanding the potential and the market through research, developing the Roadmap and establishing the DTC with three years of funding.
25. The Department of Tourism, Innovation and Sport (DTIS) has supported eight projects relating to paleo tourism, totalling more than \$10.2 million (see the table at **Attachment 3**).
26. DTIS has supported these projects through a number of funding programs such as the Growing Tourism Infrastructure Fund, the North West Minerals Province Economic Diversification Strategy, the Outback Tourism Infrastructure Fund and the Tourism Experience Development Fund.
27. In addition to this, the Australian Age of Dinosaurs also received funding through the Queensland Tourism Icons Program in 2020 which was a key element of Queensland's economic recovery plan to help accelerate the State's recovery from COVID-19.

### Opportunities and challenges

28. Outback Queensland dinosaur tourism visitation is expected to increase to 1.2 million visitor days/nights over the next 15 years, as targeted marketing campaign efforts are coordinated across the majority of operators. This level of activity will be supported by investment in infrastructure and ancillary facilities to grow tourism activity and increase the length of stay in region. Repeat visitation is expected due to the enhanced offering. By 2035 dinosaur tourism is estimated to more than double its contribution towards industry output, gross regional product, incomes, and employment.
29. By capitalising on this opportunity, dinosaur tourism is expected to grow in demand and visitation increase, directly benefiting Outback Queensland tourism and the many communities encompassed by the region. With development, dinosaur tourism will become not just a unique selling point for Outback Queensland, but for the whole of the state.

30. Dinosaurs represent an efficient path for tourism growth for Outback Queensland. A Dinosaur-centric approach will:
- consolidate investments;
  - improve awareness and interest with travellers;
  - provide a clearly defined sense of place for travellers;
  - create a condensed investment vehicle for futures; and
  - fuel tourism growth faster than previous approaches.
31. There are several key challenges in achieving the potential growth of the dinosaur tourism segment including insufficient supporting amenities including accommodation, limited funds available to the tourism operators to expand or improve their experience offering, staff constraints in Outback Queensland, transport availability, growing cost of living costs including electricity and fuel and a lack of clear sectoral vision.
32. Findings from The Lab's Dinosaur Tourism research report indicate the greatest opportunity for growth in the dinosaur tourism sector is through connecting and communicating with young families as a core market and to elevate the experience through collaboration across all levels of government, the DTC, Outback Queensland Tourism Association and TEQ.
33. In addition, the AEC Group's report on the Value of Dinosaur Tourism highlights a further two key levers in which the sector can utilise to reach the future growth visitation targets including investment through increased access to sustainable funding and resources, enhanced support for regional tourism dinosaur related attractions and services via policy levers.

Queensland  
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# Value of Dinosaur Tourism

Outback Queensland

# THE SECTOR TODAY



Outback Queensland has a rich history of fossils and palaeontology that has spurred the development of numerous dinosaur tourism attractions. Currently there are ten major dinosaur tourism attractions across Outback Queensland, including in the towns of Muttaborra, Isisford, Eromanga, Boulia, Winton, Hughenden, Richmond, Mount Isa, and Boodjumulla. These attractions collectively convey fossil history, including that related to dinosaurs, marine fossils, megafauna, and more.

**The scientific differences between fossil types are acknowledged, however, the consumer-centric and globally recognised terminology of ‘dinosaurs’ is utilised to capture the imagination and interest of consumers.**



The ten dinosaur tourism attractions account for an estimated 11.0% of all visitors to Outback Queensland, equivalent to approximately 134,400 dinosaur tourism visitors (or 500,000 visitor days / nights) in 2020 - 2021. Strong visitation to dinosaur tourism attractions has been recorded since the onset of the COVID-19 pandemic, particularly for the family market – this trend is expected to continue. This level of visitation contributes to broader tourism and economic activity across the region. Dinosaur tourism is estimated to account for approximately 17.6% of Gross Regional Product (GRP) generated by the tourism sector in Outback Queensland and 18.9% of employment, including both direct and flow on activity.







## 7 TIMES

Dinosaur tourism attractions are an economic enabler. Visitors spend more than 7 times what they spend at the dinosaur attraction in the local economy before and after their visit to the attraction.

## DIRECT IMPACT

Activity generated by visitors attending dinosaur tourism attractions, including facility operations and ancillary visitor spend.

		 <b>Facility Operations</b>	 <b>Ancillary Visitor Spend</b>	
 <b>Facility Operations</b> Operating activity of the dinosaur attraction.	Output	\$9.0M	\$68.8M	<b>\$104.9M</b>
	GRP	\$6.7M	\$35.4M	
 <b>Ancillary Visitor Spend</b> Visitor expenditure before /after attendance at the dinosaur attraction.	Income	\$2.3M	\$26.8M	<b>\$36.8M</b>
	Jobs	60 FTEs	462 FTEs	

## TOTAL IMPACT

Direct impact plus indirect impact. Indirect impact refers to activity generated by increased industry spend on goods and services, increased purchases by suppliers, and household consumption activity.

Outback Queensland has a rare and unique opportunity to grow the broader tourism economy through this unique value proposition, dinosaurs.

# REQUIREMENTS FOR GROWTH

There are four key levers that can consolidate the unique value proposition of the dinosaur tourism market and realise the future potential of the sector as it moves towards best practise:



# THE FUTURE POTENTIAL

The potential of the sector to contribute to the growth of tourism and the broader economy in Outback Queensland is significant.

Visitation is expected to increase to 1.2 million visitor days/ nights over the next fifteen years, as targeted marketing campaigns are coordinated across the majority of operators. This level of activity will be supported by investment in infrastructure and ancillary facilities to grow tourism activity and increase the length of stay in the region. Repeat visitation is expected due to the enhanced offering.

Dinosaur tourism is estimated to more than double in its contribution towards industry output, gross regional product, incomes, and employment over the next fifteen years (2035 - 36).

DIRECT IMPACT	Facility Operations	Ancillary Visitor Spend	TOTAL IMPACT
Output	\$20.9M	\$153.7M	\$235.4M
GRP	\$15.6M	\$79.2M	\$125.4M
Income	\$5.3M	\$60.0M	\$82.7M
Jobs	139 FTEs	1,029 FTEs	1,373 FTEs



**Acknowledgements:** Tourism and Events Queensland wishes to thank the organisations across Outback Queensland that shared their expertise, experiences, and valuable insight to support this study. Those involved included the teams supporting the Australian Age of Dinosaurs/ Dinosaur Stampede, Eromanga Natural History Museum, Flinders Discovery Centre, Kronosaurus Korner, Outback at Isa, Muttaborrasaurus Interpretation Centre, Boulia Heritage Complex, Outer Barcoo Interpretation Centre, Riversleigh World Heritage Area, Porcupine Gorge National Park, Outback Queensland Tourism Association, Outback Aussie Tours, Outback Pioneers, Qantas Founders Museum, North Gregory Hotel, Boulder Opal Motel, and Royal Hotel Hughenden. A special thankyou also to the teams at the Dinosaur National Monument and Dinosaur Ridge in the United States and Dinosaur Provincial Park in Canada for their generous assistance with supporting this study.

TOURISM  
& EVENTS  
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# Summary of Key Insights.



**Dinosaurs have immense value and are ever present**

Dinosaurs are non-generation specific and ever-present in their appeal, delivering the fantasy, curiosity and scientific reality that connects to human nature.



**Our Dinotourism offer is unknown but appealing**

Even those with a deep interest in Dinotourism, and regularly engage through popular culture and Museums, don't know about Outback QLD's Dinotourism offer, but are immensely interested. Dinotourism also links with emerging travel trends in delivering to the experiential traveler.



**Past Visitors consider us as 'world leading'**

Whilst awareness is low, those who have experienced Outback QLD's Dinotourism are promoters of the experience, speaking strongly about the unparalleled experience.



**Logistics and Accommodation are key barriers**

Perceived logistical barriers in terms of 'things to do', places to stay and on-the-way experiences is a key barrier that can be overcome. The competitiveness and busyness of peak seasons present a realised barrier in a lack of and expensive accommodation, a key source of improvement going forward.



**Young Families are our core opportunity (but not our sole opportunity)**

Although the accommodation and logistical barriers are currently too large for those with a lower interest in Dinosaurs and Edutourism more broadly, there's an immense opportunity amongst young families (skewing boys aged 7-12) to connect as a core target.



**Promote Outback Queensland's diversity**

Although Dinotourism is a key travel driver for many, it's important to encapsulate the broader beauty, rich history and diverse experiences Outback Queensland has to offer.



**We can elevate our offer through effective USP messaging**

There's key messages that engage a diverse audience of Dinotourism considerers that are true to the experiences. Through a unified approach, there's a greater opportunity to grow, awareness, growth, equity and investment.

COUNT 8 SUB TOTALS 225,000 9,994,697 10,219,697 1,761,958 11,981,655

Fund	Proponent	Project Approved	Infra Support	Infra Project	Total Funding	Applicant Contribution	Project Value (est.)	Expected / Actual Completion Date	Open / Finalised?
GTI2018	Australian Age of Dinosaurs Limited	Dynamic Destination: Developing sustainable summer tourism: Expansion of the Museum's experiences to offer new year-round day and night tourism attractions.	0	4,934,299	4,934,299	208,558	5,142,857	08/05/2021	Finalised
GTI2020	Grant David Smedley	Capricorn Dinosaur Park: The Capricorn Dinosaur Park project at Cooberrie Park Wildlife Sanctuary involves the construction of 35 life-sized dinosaurs, a one-kilometre wheelchair and stroller-friendly dinosaur walk, an educational dinosaur fossil dig, mini golf, and a picnic and playground area.	0	796,398	796,398	77,600	873,998	04/04/2023	Finalised
GTI2020	Outback Gondwana Foundation Limited	Viewing Galleries for Australia's largest dinosaur: This project comprises Stage 2 Phase 2a and will construct: An interpretation corridor with glazed viewing into preparation labs, glazed viewing of the real bones of Australia's largest dinosaur into the Holotype room, glazed viewing area into the fossil collection room and plant room; Viewing area #1 – live fossil preparation eg. Skulls, large complete limbs etc; Viewing area #2 – taxidermy, entomology, microfossil sorting; Viewing area #3 – fossil (holotype) collection room; Project Design and Management; Fitout; Supporting renewable power supply.	0	2,000,000	2,000,000	-	2,000,000	24/03/2022	Finalised
NWMP	Mount Isa City Council	Mt Isa CC - VR Experience at Riversleigh Fossil Center (Project 1): Development of a Tourism Pipeline Project - Development of a virtual reality experience as part of the Riversleigh Fossil Centre.	150,000	-	150,000	-	150,000	13/08/2020	Finalised
NWMP	Richmond Shire Council	Richmond SC - Design to Support Refub & Expansion of Kronosaurus Korner: The detailed design and tender documentation for the modernisation and expansion of Kronosaurus Korner in Richmond.	75,000	-	75,000	-	75,000	14/04/2020	Finalised
OTIF	Mount Isa City Council	Riversleigh Fossil Centre Revitalisation: Redesign and enhancement of the Fossil Centre to provide an engaging, educational experience for visitors that showcases the fossil stories of the local area.	-	1,230,000	1,230,000	410,000	1,640,000	24/06/2020	Finalised
OTIF	Outback Gondwana Foundation Limited	Australia's Largest Dinosaur Interpretation Infrastructure: The project will provide for the design and construction of a full-sized scientifically accurate 3D printed and painted skeleton of 'Cooper', Australia's largest dinosaur.	-	834,000	834,000	116,000	950,000	24/03/2022	Finalised
TED	Australian Age of Dinosaurs Limited	Create, Captivate and Consolidate: the CCC project: Upgrade of helipad, reception centre enhancement and construction of exhibition development to house the significant Australian fossil collection being purchased.	-	200,000	200,000	949,800	1,149,800	31/01/2024	Open