KUR-World

Social and Economic Impact

Chapter 11.0

Environmental Impact Statement

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Abbreviations used in this chapter are as follows:

Abbreviation	Meaning
ABS	Australian Bureau of Statistics
CHMP	Cultural Heritage Management Plan
CRG	Community Reference Group
DIDO	drive-in/drive-out – describing the type of workforce transport
FIFO	fly-in/fly-out – describing the type of workforce transport
GFC	Global Financial Crisis
GRP	Gross Regional Product
IVS	International Visitor Survey
NGO	Non-Government Organisation
NVS	National Visitor Survey
TNQ	Tropical North Queensland
TRA	Tourism Research Australia
Q&A	Questions and Answers
Q.I.T.E.	Quality, Innovation, Training and Employment

11.0 SOCIAL AND ECONOMIC

The purpose of this Chapter is to:

- Describe the existing social and economic profiles of Kuranda, Atherton Tablelands and Cairns Region
- Identify the impacts of the project on social and economic matters
- Provide mitigation and management measures to any impacts which will be applicable throughout the life of the project.

This Chapter should be read in conjunction with Chapter 17 Cultural Heritage (Indigenous and Non-Indigenous) and Chapter 21 Environmental Management Plan (including social and economic matters). The cultural heritage chapter provides the history, context and values of the diverse social and economic profile of Kuranda village and the surrounding rural residential developments and Indigenous settlements. The EMP provides details of the mitigation strategies, management plans and proponent commitments for social and economic matters.

11.1 Social and economic profiles

11.1.1 Governance and locational context

For statistical purposes, Kuranda and the Tablelands form part of the Cairns region. This region comprises the Atherton Tablelands, the city of Cairns and the tropical coastal areas to the south covered by Cassowary Coast Regional Council, and areas to the north, covered by Douglas Shire Council, refer to maps in Appendix 8A (Appendix 1). It does not include areas of the Mareeba Shire west of the Dividing Range.

The population of the Cairns region is currently around 247,000 (Cairns 160,000; Tablelands 47,000; Cassowary Coast and Douglas 40,000).

The economic and social influence of Cairns as a regional city spreads wider than the immediate Cairns region. Effectively, the entire Peninsula Australia geographic region, including the whole of Cape York and the Torres Strait Islands to the north and the Gulf Savannah region west to the Gulf and the Northern Territory border looks to Cairns city for major regional economic and social services.

The Peninsula Australia geographic region is referred to as Tropical North Queensland for tourism marketing purposes or alternatively as Far North Queensland. Economic and social influences from this wider region affect the growth of Cairns as a service centre, supported in this context by the major Tablelands' centres of Mareeba and Atherton; with Mareeba servicing north and north-west into the Peninsula and Atherton south and south west into the Gulf Savannah area.

For local government administration, the northern end of the Tablelands is administered by the Mareeba Shire Council with a large area extending further west of the Great Dividing Range area into hilly mineralised areas and then onto the plains of the Gulf of Carpentaria; with headquarters in Mareeba.

The southern areas of the Tablelands form part of the Tablelands Regional Council area; with headquarters at Atherton. The Tablelands Regional Council's area also extends to the west into the mineralised hilly area around Herberton and south into the savanna woodland medium rainfall area of the upper Herbert River and the volcanic McBride Tablelands.

Total population of the Tablelands is about 47,000, making it the most populous region west of the coastal ranges in Queensland north of the Darling Downs area west of Brisbane.

11.1.2 Community definitions

For the purposes of this study, the communities potentially affected by the KUR-World project are identified as follows:

(i) Local area – Kuranda area as defined by Australian Bureau of Statistics Kuranda Statistical Area Level 2.

(ii) District – Tablelands geographical area as defined by the local government areas of Mareeba Shire Council and Tablelands Regional Council which are also defined by ABS by Tablelands East – Kuranda Statistical Area Level 3 plus Queensland Outback Far North – Tablelands SA2[1].

(iii) The Cairns region as defined by Cairns Statistical Area Level 4 comprising the local government areas of Cairns, Cassowary Coast, Douglas, Tablelands and Mareeba *(less Queensland Outback Far North – Tablelands)*.

(iv) The State of Queensland.

11.1.3 Development of Cairns and Far North Queensland

The Cairns and Peninsula Australia region lies within Australia's tropics (until recently referred to as the *Torrid Zone*), which have historically posed significant challenges to development. Cairns was not founded until 1876, almost 100 years after Sydney and early pastoral development received a further major setback when tick-born fever swept through cattle herds in the 1890s.

Most early development was based on mining in the area west of the Tablelands, which went into decline in the 1920s. Development of tropical agriculture was slow and beset by problems of remoteness and high labour costs. By 1947, population in the Peninsula Australia region (1½ times the size of Victoria and equivalent in area to the British Isles), was only 70,000 and Cairns City 16,000.

However, the region is not poor in resources and in the post-war period through to the present, there has been major growth in population, which has expanded four-fold and is now the largest in northern Australia, with a population of approximately 247,000. Cairns as a city has expanded ten-fold to about 160,000.

The regional value of primary industries and processing is now of the order of $2 billion/annum. Mining output has been more erratic in its growth but stands today (especially through expansion at Weipa) at $1 billion/annum. On top of this, the region has developed a major tourism sector based on the world class tourism attributes of the Great Barrier Reef, Tropical Rainforests and Outback experiences. The Cairns/Tropical North Queensland region is one of Australia's leading international tourism regions. Visitor expenditure is now over $3 billion/annum.

Based on its growing population and large tourism numbers, Cairns International Airport has developed as the leading airport in northern Australia with direct international links to ten Asia Pacific cities.

11.1.4 Demographic context of Cairns and Far North Queensland

Before European settlement, the wider Peninsula Australia geographic region had a relatively large Aboriginal and Torres Strait Islander population. Aboriginal and Torres Strait Islanders still form the majority of the population in Cape York Peninsula, Torres Strait and parts of the Gulf area, and remain a significant population component in the Cairns region than in Queensland overall.

[1] Where appropriate for 2016 Census data, Tablelands East – Kuranda SA3 only has been used to describe the Tablelands area.

There is a high proportion of the population descended from settlers prior to World War II of British and North European descent but also from early migration from Italy, Greece Malta and Lebanon; many initially arriving to take up work as canecutters.

The early post-war period saw strong inward migration occurring from Europe including a high proportion from Italy and the Balkans. Other families of European origin also migrated to the area from tropical countries as they received independence, including Asia, Africa, South America, the Caribbean and in the 1970s from Papua New Guinea.

Very strong growth from the 1970s saw substantial inward movement of the population from southern Australia, especially into Cairns and the coastal tourism areas. More recently, tourism has brought young people from UK/Europe, USA and Japan deciding to settle in the area, and more recently from China.

11.1.5 Development of the Atherton Tablelands

The Atherton Tablelands have played an important role in the region's development. Initial impetus for settlement in Far North Queensland was heavily influenced by pastoral industry movements into the area, logging of rainforest timbers, the early gold rushes and the development of base metal mining (tin, copper, lead zinc) on the western margins of the Tablelands.

By comparison, the development of agriculture in the region was slower to occur. Early development was primarily in the southern Tablelands area, with dairying and mixed farming of maize, peanuts, potatoes, etc., for local markets. After the Tinaroo Dam was completed in 1956, substantial development of tobacco growing occurred in the northern Tablelands area within the Mareeba Dimbulah Irrigation Area. The Wet Tropics World Heritage listing in 1988 banned logging in most rainforests and sawmilling was greatly reduced. Tobacco growing ceased in the mid-1990s when tariff protection was removed. Following the demise of the tobacco industry, a rapid development and diversification of horticultural and vegetable cropping took place, especially in the irrigated areas around Mareeba.

The advent of B-double freight vehicles also saw sugar growing, previously confined to the coast, commence on the Tablelands initially to supply coastal mills via the coastal escarpment roads. This was followed by establishment of a mill west of Mareeba. In more recent years, especially after cyclones Larry (2006) and Yasi (2011) affected coastal banana growing, substantial banana cropping has developed on the Tablelands and further north at Lakeland Downs.

Expanding tourism, assisted the development of a number of crops for the restaurant trade and led to the establishment of coffee, tea and winery/distilling businesses. As in the rest of the North, the cattle industry has recorded long-term steady growth in numbers and turnoff. Mining was greatly reduced after the 1920s but has had sporadic upsurges, especially around Mt Garnet and Chillagoe.

Most overnight tourism into the Tablelands area tends to be local recreational visitors from the coast, grey nomad business and some international farm stay. There is a large day-tripper trade out of Cairns to Kuranda but the former widely-used circuits around the Tablelands have fallen drastically in popularity since Skyrail 'closed the loop' with the Kuranda Railway from Cairns. Since then, tourism on the wider Tablelands has languished and the development of an iconic accommodation facility has been a goal of several tourism development strategies.

11.1.6 Demographic context of the Atherton Tablelands

After the decline of mining from the 1920s, much of the early settler population from the mining towns moved into the expanding Tablelands' agricultural areas, as well as to the coast and Cairns. The post-World War II expansion of tobacco growing saw heavy migrant entry from Italy and the Balkans, especially into irrigation farming in the Mareeba Dimbulah Irrigation Area.

Unlike many Australian rural areas, expansion of agriculture supplemented by tourism and mining surges has seen steady population growth. However, the population remains dominated by early settler families and post-war migrant families. Most recently, significant numbers of residents with farming and mining backgrounds entered the FIFO (fly-in/fly-out) arrangements to mines outside the region during a mining boom period.

As in most rural communities, there is a significant element of what has been termed a 'spiralist' demographic – typically bank managers, police, school teachers, hospital staff who move through community towns on postings as they work their way up to a move back to larger centres. They are mainly from elsewhere in Queensland, including substantial numbers from south-east Queensland.

Recently, requirements for labour for the expanding horticultural industries has led to employment of substantial numbers of seasonal workers, mainly from Europe and the Pacific Islands.

11.1.7 Development of the Kuranda Area

The location of the Kuranda area at the top of the east coast escarpment, immediately west of Cairns is a unique mix of social and economic attributes. Kuranda itself lies at a critical point on the major road and rail links via the historically difficult ascent of the escarpment, between Cairns and the bulk of its extensive hinterland. Of special significance for Kuranda, the road and rail routes provide close linkages with the nearby Cairns City and strong links with the rest of the Mareeba and the Tablelands area.

For traffic coming from Cairns, the ascent of the range by road, rail or Skyrail cable car provides a strong sense of arrival, and (formerly) a jumping-off point for Tableland visitation. Because of its altitude and enclosure, there is also a sense of difference from the coast and savanna country to the west of Mareeba and Atherton.

Historically, Kuranda had two initial socio-economic influences: (i) a substantial Aboriginal population, especially at the old Mona Mona Mission but also in the Mantaka/Kowrowa areas (Appendix 8C); and (ii) a small local early settler family population, mainly engaged in farming, the timber industry and servicing the railway.

From its earliest days, the spectacular views of the Kuranda Rail trip and the rainforests in the area were attractive to visitors. For Cairns residents, Kuranda was somewhat of a 'Hill Station' and cooler recreation area. A visit to Kuranda by rail via the Barron Falls became part of the experience of a growing number of visitors coming to the region - initially by steamship, then by rail, road and finally by air.

In the post Pacific war period, Kuranda became a viable residential area for Cairns as the population grew. In the 1960s, another demographic element arrived in the form of the alternative lifestyle culture attracted by Kuranda's rainforest environment and its separateness from urban Cairns. This culture, with its emphasis on lifestyle and creative industries defined Kuranda as a tourism destination. The Kuranda markets became a special feature.

By the 1970s, tourism was based on a day trip to Kuranda by train and then by coach around the Tablelands. Under the influence of the Kuranda Markets and the Tjapukai Indigenous cultural experience, as well as the 'closing of the rail loop' in the 1990s by Skyrail, Kuranda has increasingly become a destination in its own right; currently attracting about a million day-visitors a year, relatively few of whom go on to visit the wider Tablelands.

11.1.8 Demographic context of the Kuranda Area

This pattern of development has led to different key elements in Kuranda's economic and social structure, including:

(i) A substantial Aboriginal population (Appendix 8C Indigenous Community Profile).
(ii) A small-scale or hobby farming population, with land use increasingly reflecting urban fringe activities such as nurseries, horticulture and horse-riding stables.
(iii) A significant residential population catering for the large number of tourist day trippers and a small (mainly B&B) accommodation sector. This population also includes a substantial creative industries element with alternative lifestyle influences.
(iv) A rural residential element who work in Cairns and other Tablelands centres. This element includes professional and higher socio-economic families, as well as a substantial component of more recent inflow families from southern Australia.
(v) A business and trades population, servicing local needs.

11.1.9 Regional socio-economic profile

This section provides a socio-economic profile for Kuranda, the Tablelands and the Cairns region, based on data from the Censuses of 2016 and 2011; and are covered in significantly greater detail in Appendix 8A Social and Economic Profile. Also refer to Appendix 8C for further detailed information on the Indigenous Community Profile.

For statistical purposes, Kuranda is defined by the Statistical Area level 2 of Kuranda. The following Table 11-1 gives residential population size and growth for the Kuranda area.

Table 11-1: Estimated residential population – Kuranda (Statistical Area Level 2), 1991-2016[2]

Year	Population
1991	3,309
1992	3,448
1993	3,589
1994	3,649
1995	3,687
1996	3,762
1997	3,714
1998	3,666
1999	3,656
2000	3,690
2001	3,679
2002	3,704
2003	3,722
2004	3,710
2005	3,778
2006	3,785
2007	3,857
2008	4,135
2009	4,309
2010	4,449
2011	4,555
2012	4,606
2013	4,654

[2] The figures for 2011-2016 are inter-census estimates, subject to revision after actual 2016 Census figures become available. The 2016 Census data indicates that growth of usual place of residence population at 3.6% for 2011-2016 was lower than the above estimated at 4.6% leading to a probably minor.

Year	Population
2014	4,678
2015	4,752
2016	4,766
Average annual growth	
1991-2016	**1.5% pa**
5 years 2006-2011	**2.8% pa**
5 years 2011-2016	**0.9% pa**

From Table 11-1, indications are that long-term population growth in the Kuranda area has been 1.5% per annum. In the context of the wider Tablelands' community, the Kuranda population represents about 22% of Mareeba Shire and about 10% of the Mareeba/Tablelands' area (Table 11-2 to Table 11-4 for summaries of source data).

Table 11-2: Overall estimated residential population and growth, Atherton Tablelands community.

Year	Mareeba Shire Council area	Tablelands Regional Council area	Total Tablelands
1991	17,032	19,808	**36,840**
2001	18,125	21,894	**40,019**
2011	20,691	24,372	**45,063**
2016	22,025	25,064	**47,089**
Average annual growth			
1991-2016	**1.0% pa**	**0.9% pa**	**1.0% pa**

Source: Cummings Economics from Australian Bureau of Statistics, Cat No. 3218.00.

Table 11-3: Overall estimated residential population and growth, Cairns SA4 Region

Year	Population
1991	158,340
2001	191,842
2011	232,781
2016	248,110
Average annual growth	
1991-2016	**1.8% pa**

Source: Cummings Economics from Australian Bureau of Statistics, Cat No. 3218.00

The Cairns SA4 estimated residential population is the largest in northern Queensland and across northern Australia. Along with Darwin and the Top End, it has recorded the fastest long-term growth since 1991.

Table 11-4: Estimated residential population and growth, Northern Australia, 2016[3]

Region	Population	Growth 1991-2016
Cairns SA4 region	246,110	*+55%*

[3] Census 2016 figures compared with 2011, usual place of residence, indicate that post census revised figures will be slightly higher for Cairns and Northern Territory but lower for the other regions.

Region	Population	Growth 1991-2016
Townsville SA4 region	239,800	*+42%*
Fitzroy SA4 region	235,470	*+37%*
Mackay SA4 region	181,786	*+47%*
Darwin and Top End	200,614	*+59%*
Kimberley Pilbara SA3 regions	104,500	*+49%*

Source: Cummings Economics from Australian Bureau of Statistics, Cat No. 3218.00.

11.1.10 Visitor population

At the time of the 2016 Census, the overnight visitor population as a percentage of residents was estimated as 6.7% in Kuranda, 9.9% on the Tablelands and 16.4% in Cairns region as summarised in the following Table 11-5.

Table 11-5: Overnight visitor population, Census 2016

Region	Kuranda SA2	Tablelands East SA3	Cairns SA4 region
Queensland	116	2,071	13,457
Interstate	118	1,257	18,442
Total domestic	**234**	**3,328**	**31,899**
International	73	862	14,670
Total	**307**	**4,190**	**46,569**
% of Census Count.	**6.7%**	**9.9%**	**16.4%**

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

As can be seen in Table 11-5, overnight visitors in the Kuranda area were not high compared with population. However, day visitor numbers to the Kuranda area are extremely high. Total annual day visitation to Kuranda is estimated at about 1 million a year (i.e. an average of about 2,700 a day) and at peak period about equal to the entire residential population of the Kuranda area.

The great bulk of visitors are on a day visit from Cairns between 10.00am and 3.00pm.

11.1.11 Education

The percentage of those attending an education institute (2016 census) by statistical area is shown in Table 11-6 below. The Kuranda community has a higher level of education qualifications beyond school than the regional average and of those, a higher proportion were at university level. However, this is a significantly lower proportion of the population attending university/tertiary level compared with Queensland averages (Table 11-7 below).

Table 11-6: Percentage (%) of those attending an education institution, Census 2016

	Kuranda SA2	Tablelands East SA3	Cairns SA4	Queensland
Preschool	2.9%	3.1%	3.3%	4.8%
Primary School	27.8%	29.0%	27.5%	26.7%
Secondary	19.9%	21.3%	20.4%	20.1%
Technical & Further	2.8%	3.4%	4.7%	5.9%
University or Tertiary	7.9%	5.3%	8.6%	16.1%
Other	1.8%	2.0%	2.3%	2.8%
Not stated	37.1%	36.0%	33.1	23.7%

Total	100.0%	100.0%	100.0%	100.0%

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

Table 11-7: Post school education qualification - % of population with a qualification, Census 2016

	Kuranda SA2	Cairns SA4
University degree or higher	35%	30%
Diploma level	19%	18%
Certificate level	47%	53%
Total	**100%**	**100%**
% of Population aged 15 plus with a qualification	**47%**	**42%**

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

The ABS 2016 census data compares the education level attained (Table 11-8) and details on levels of current study (current in 2016) (Table 11-9). This data illustrates the relatively low level of school completion rates of Indigenous compared to non-Indigenous people. It also shows a high level of Certificate qualifications among the Aboriginal residents and low rates of university completion. These are contributing factors that affect the ability of local Aboriginal people to obtain 'mainstream' employment (Appendix 8C for further detail).

Table 11-8. Comparison of educational level attained for Indigenous and non-Indigenous residents of the Kowrowa – Mantaka – Mona Mona area (ABS 2016 census data)

	Year 12	Year 10-11	Year 9 and below
Indigenous (n.125)	34	66	25
Non-Indigenous (n. 242)	135	90	17

Table 11-9. Comparison of post school qualifications by Indigenous and non-Indigenous residents of Kowrowa – Mantaka – Mona Mona area (ABS 2016 census data)

	Cert II-III	Diploma	Bachelor Degree	Post-graduate
Indigenous (n.35)	26	6	3	0
Non-Indigenous (n. 128)	53	27	42	6

Table 11-10 indicates that although the Kuranda SA2 has a high proportion of population with trade and vocational qualifications, the proportion attending a Technical and Further Education (TAFE) institution is low at 2.8% compared with 3.4% for the Tablelands and 5.3% for Queensland (Table 11-10). Much of the reason for this can be found in the age structure of the population (Table 11-11).

While there are no TAFE facilities in Kuranda, one of the largest TAFE colleges in regional Queensland is located close by in Cairns and a further facility is at Mareeba.

Table 11-10: Kuranda – population 15 years & over with Trade and Vocational education qualification, Census 2016

Status	Kuranda SA2	(cf Qld)
Advanced Diploma & Diploma Level	10.0%	8.7%
Certificate Level IV	3.7%	3.0%

Certificate Level III	13.4%	12.2%
Total	**27.1%**	**23.9%**

Source: Cummings Economics from ABS Census 2016.

Table 11-11: Kuranda – Proportion of population in younger age groups, Census 2016

Age	Kuranda SA2	(cf Qld)
School Ages		
5 – 9	6.9%	6.7%
10 – 14	7.1%	6.4%
Technical & Further Education Ages		
15 – 19	5.0%	6.3%
20 – 24	2.9%	6.7%

Source: Cummings Economics from ABS Census 2016.

Although the Kuranda profile of field of study of non-school qualifications is similar to the region, Kuranda has greater representation in the fields of natural and physical science, agriculture, environment and related studies, health, education, society and culture, and creative arts (Table 11-12).

Table 11-12: Non-School Qualification, Fields of Study, Census 2016

	Kuranda SA2 %	Cairns SA4 %	Kuranda +/-
Natural and Physical Sciences	3.5	2.1	+
Information Technology	1.3	1.1	+
Engineering and Related Technologies	16.3	17.4	-
Architecture and Building	6.7	7.6	-
Agriculture, Environmental and Related Studies	4.2	2.5	+
Health	9.2	8.8	+
Education	7.8	7.5	+
Management and Commerce	10.0	13.7	-
Society and Culture	10.6	8.9	+
Creative Arts	4.4	2.1	+
Food, Hospitality and Personal Services	6.0	6.7	-
Mixed Field Programmes	0.2	0.1	+
Field of study inadequately described	0.6	1.1	na
Field of study not stated	19.0	20.9	na
Total	**100.0**	**100.0**	

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

11.1.12 Workforce status

Table 11-13 compares workforce totals (including unemployed) in the region from the 2016 Census. The following Table 11-14 compares workforce status from the 2016 Census and shows that the Kuranda area had 1.5% greater unemployment than the Queensland average and 1.3% higher than the Cairns region.

Table 11-13: Total workforce[4] (usual place of residence), Census 2016

Area	Population in Workforce
Kuranda SA2	2,010
Tablelands SA3	17,200
Cairns SA4	115,176

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

Table 11-14: Workforce status (usual place of residence), Census 2016

Workforce Status	Kuranda SA2	Mareeba/Tablelands LGAs	Cairns SA4 region	Queensland
Worked full time	50.1%	53.1%	58.6%	57.7%
Worked part time	34.4%	32.8%	28.1%	29.9%
Away from work	4.6%	4.1%	4.0%	3.2%
Unemployed	9.1%	8.0%	7.8%	7.6%

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

Kuranda also has a 4.5% higher proportion of part time workers and 7.6% lower proportion of employed people than wider Queensland.

The Indigenous population in the Kuranda area in the 2016 Census was 517, around 11.5% of the population. Table 11-15 indicates a high Indigenous unemployment rate and a low workforce participation rate, compared to the non-Indigenous community. Barriers to employment include overcrowding, poverty and inter-generational welfare dependency (Refer Appendix 8C for further detail on Indigenous workforce participation).

Table 11-15: Indigenous and non-Indigenous workforce, Kuranda SA2 & Mareeba/Tablelands Region, Census 2016

Workforce Measurement	Indigenous		Non-Indigenous	
	Kuranda SA2	Mareeba/Tablelands region	Kuranda SA2	Mareeba/Tablelands region
% Unemployed	31.9%	29.3%	7.9%	6.5%
% Workforce participation (population 15 plus)	36.6%	44.4%	63.2%	58.0%

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

The indications are that the relatively high unemployment rate recorded for Kuranda SA2 is in substantial part due to the relatively high Indigenous population. Targeting Indigenous employment would therefore help to bring down the high unemployment rate in the area and assist with alleviating the impacts of inter-generational welfare dependency (Refer Appendix 8C for further detail on Indigenous workforce participation).

The 2016 Census indicates in Table 11-16 that youth unemployment in the Cairns SA4 region was relatively high and about double that of the overall workforce but in the Kuranda SA2 area, it was very high at 21.1%.

Table 11-16: Youth unemployment rate

Region	Average Unemployment Rate	
	Age 15 – 24	Workforce Total
Kuranda SA2	21.1%	9.1%
Mareeba LGA	15.5%	8.3%
Tablelands LGA	13.0%	7.7%

[4] Includes unemployed

Cains SA4 region	15.1%	7.8%

Source: Cummings Economics from Census 2016 data.

This indicates a special need to attend to training and employment opportunities for young people in the region but especially in the Kuranda area.

11.1.13 Location of work

The following Census 2016 data in Table 11-17 indicates that the majority (59%) of Kuranda residents work elsewhere (mostly in Cairns - 38%) with a significant proportion (11%) working in the Mareeba/Tablelands area. Of jobs in Kuranda area itself, 31% were filled by persons from outside the Kuranda area, mostly from Cairns (21%), with 50 from the Mareeba/Tablelands area.

Table 11-17: Worked in Kuranda (usual place of residence), Census 2016

Usual place of residence	Population	Percentage (%)
Kuranda residents	735	68.9
Residing elsewhere	332	31.1%
Total Kuranda place of work	**1,067**	**100%**
Kuranda residents working outside Kuranda	1,057	

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

With rising costs of commuting, these figures imply that the creation of additional jobs in the area would encourage a proportion of the existing population choosing to work locally, rather than commute to other locations. For example, assuming a cost per kilometre of $0.66/km (ATO Private Vehicle Reimbursement Rates 2017/2018), full-time equivalent commuting to Cairns from Kuranda is equivalent to $178.86 per week, or $8,585.28 per annum (based on 48 working weeks). As is it difficult to determine the validity of this assumption, transport modelling in Section 13.4.2.1 does not take this into account. Furthermore, a Local Employment policy will be developed prior to commencement of construction to identify mechanisms for encouraging local employment (as outlined in Chapter 21, Section 21.2.10 Workforce).

11.1.14 *Workforce by occupation*

The following Table 11-18 identifies the composition of the residential workforce by occupation from the 2016 Census.

Table 11-18: Residential workforce by industry (usual place of residence), Census 2016.

Industry/Sector	Kuranda SA2	Mareeba/Tablelands LGAs	Cairns SA4	Queensland
Managers	14.7%	**14.8%**	12.2%	12.1%
Professionals	**21.4%**	15.1%	17.3%	19.8%
Technicians & Trades	**15.2%**	14.0%	14.7%	14.3%
Community & Personal Services	12.6%	12.2%	**13.2%**	11.3%
Clerical & Administration	11.8%	11.6%	12.4%	**13.6%**
Sales	8.7%	9.3%	**10.1%**	9.7%
Machinery Operators & Drivers	4.7%	**7.0%**	6.2%	6.9%
Labourers	9.2%	**14.5%**	12.0%	10.5%
Inadequately described	1.5%	1.6%	1.7%	1.6%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016. Denotes highest.

Regional (Cairns SA4) residential workforce figures are relatively close to State patterns but with professionals lower, and community and personal services, sales and labourers higher. The Kuranda area has a high level of professionals, well above the regional figures and even above the Queensland average. Labourers and machine operators and drivers are well below the regional average but the nearby Tablelands area proportion is high.

The indications are that a high proportion of those living in the Kuranda area and working elsewhere are in the professional category.

11.1.15 Workforce by industry

The following Table 11-19 gives composition of the residential workforce by industry from the 2016 Census.

Table 11-19: Residential workforce by industry group (usual place of residence), Census 2016

Industry Group	Kuranda SA2		Mareeba/Tablelands LGAs		Cairns SA4		Queensland
	Population	*Percentage*	Population	*Percentage*	Population	*Percentage*	*Percentage*
Agriculture, forestry & fishing	87	*4.8*	2,038	*12.9*	6,041	*5.7*	*2.8*
Mining	41	*2.2*	412	*2.6*	1,716	*1.6*	*2.3*
Manufacturing	56	*3.1*	714	*4.5*	4,583	*4.3*	*6.0*
Electricity, gas, water & waste services	10	*0.5*	171	*1.1*	997	*0.9*	*1.1*
Construction	149	*8.2*	1,257	*7.9*	8,304	*7.8*	*9.0*
Wholesale trade	26	*1.4*	297	*1.9*	2,228	*2.1*	*2.6*
Retail trade	190	*10.4*	1,665	*10.5*	10,935	*10.3*	*9.9*
Accommodation & food services	130	*7.1*	1,007	*6.4*	10,390	*9.8*	*7.3*
Transport, postal & warehousing	101	*5.5*	605	*3.8*	6,109	*5.8*	*5.1*
Information media & telecommunications	18	*1.0*	104	*0.7*	776	*0.7*	*1.2*
Financial & insurance services	18	*1.0*	185	*1.2*	1,439	*1.4*	*2.5*
Rental, hiring & real estate services	30	*1.6*	208	*1.3*	1,910	*1.8*	*2.0*
Professional, scientific & technical services	97	*5.3*	582	*3.7*	4,479	*4.2*	*6.3*
Administrative & support services	89	*4.9*	479	*3.0*	4,349	*4.1*	*3.5*
Public administration & safety	138	*7.6*	1,090	*6.9*	7,823	*7.4*	*6.6*
Education & training	194	*10.6*	1,479	*9.3*	9,330	*8.8*	*9.0*
Health care & social assistance	237	*13.0*	2,020	*12.8*	14,080	*13.3*	*13.0*
Arts & recreation services	77	*4.2*	230	*1.5*	1,921	*1.8*	*1.6*
Other services	48	*2.6*	602	*3.8*	4,330	*4.1*	*3.9*
Inadequately described/Not stated	95	*5.2*	669	*4.2*	4,395	*4.1*	*4.3*
Total	**1,823**	***100.0***	**15,824**	***100.0***	**106,148**	***100.0***	***100.0***

Source: ABS, 2016 Census. ☐Denotes highest percentage amongst the Statistical Areas or Queensland.[5]

Table 11-19 indicates that a high proportion of the workforce in Kuranda is in construction, transport, information media, administrative support services, public administration and safety, while a higher percentage are in the arts and recreation sectors.

11.1.16 Age profile

Table 11-20 indicates that the Kuranda area has a comparatively high proportion of the population in the 45 – 64 age group, and very low numbers in the 15 – 29 age group. However, 0 – 14 and 30 – 44 are roughly in line with Queensland and Cairns regional proportions. The Tablelands region is generally high in the 65 plus age group. Compared with the 2011 Census, these data indicate a strong aging of population in Kuranda with part of the large 45 – 64 age group passing into the 65 plus age group.

Table 11-20: Age profile, Census 2016

Years	Kuranda SA2		Tablelands East SA3	Cairns SA4	Queensland
	2016	(cf 2011)			
0-14	19.1%	(20.4%)	18.6%	19.9%	19.4%
15-29	10.7%	(13.1%)	14.6%	17.4%	19.8%
30-44	18.6%	(19.2%)	15.5%	19.7%	20.3%
45-64	34.5%	(33.9%)	29.0%	27.6%	25.2%
65 plus	17.1%	(13.4%)	22.4%	15.2%	15.4%
Total	**100.0%**	**(100.0%)**	**100.0%**	**100.0%**	**100.0%**
Median Age	**45 yrs**	**(43 yrs)**	**45 yrs**	**39 yrs**	**37 yrs**

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

The percentage of the Indigenous population in comparison to the Non-Indigenous population by age cohort inKuranda is described in Table 11-21. The proportion of the Indigenous population under 29 years is almost twice than the non-Indigenous population and of those over 44, the Indigenous population is 50% lower.

Table 11-21 also illustrates that the non-Indigenous population is ageing, with high representation in the 45 – 64 age group, and in increase in the proportion represented in this group since the 2011 Census, which identified with the 65 plus age group at 19% in 2016 compared with 15% in 2011.

Table 11-21: Indigenous and non-Indigenous population by age, Kuranda SA2, Census 2016[6]

Years	Indigenous	Non-Indigenous
0-14	38%	17%
15-29	19%	13%
30-44	19%	22%
45-64	18%	29%
65 plus	6%	19%
Total	**100%**	**100%**

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

[5] These figures are for workforce residing in Kuranda and include a majority working outside Kuranda, especially in Cairns.
[6] Note: Excluding "not stated".

11.1.17 Housing

Table 11-22 identifies that the Kuranda community has a high proportion of separate houses and low proportion of semi-detached dwellings and flats, when compared to Cairns and Queensland in particular.

Table 11-22: Kuranda – Dwelling types, Census 2016

Housing	Kuranda SA2	Tablelands East SA3	Cairns SA4	Queensland
Separate house	95.1%	90.3%	76.6%	76.6%
Semi detached	0.6%	2.4%	7.5%	10.6%
Flat Unit	1.3%	4.4%	13.4%	11.3%
Other	2.2%	2.4%	1.7%	1.0%
Not stated	0.8%	0.5%	0.8%	0.5%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Cummings Economics from ABS Census 2016.

A higher proportion of the housing is owned outright in Kuranda compared to the Queensland average, 37.2% of properties have mortgages and 22% of the dwellings are rented (Table 11-23). In the rental market, there is little available under $300 a week and it was reported that when rental properties come on the market, they are taken up quickly and vacancy rates are low. More recent information on the price of rentals registered with the Queensland Rental Tenancies Authority indicates for March quarter 2017 is listed in Table 11-24.

Table 11-23: Kuranda – Ownership of dwellings, Census 2016

	Kuranda SA2	(cf Qld)
Owned outright	36.0%	28.5%
Owned with mortgage	37.2%	33.7%
Rented	22.4%	34.2%
Other tenure type	1.1%	0.9%
Tenure type not specified	3.3%	2.7%

Source: Cummings Economics from ABS Census 2016.

Table 11-24: Median rental prices Kuranda and Cairns, Queensland Rental Tenancies Authority 2017

	Kuranda	Cairns PC 4870
House 3 bedrooms	**$390**	**$380**
Flats 2 bedrooms	**$270**	**$300**

Table 11-25 indicates that median rents in the Kuranda area are relatively low (although this could have been partly affected by very low rents for Indigenous housing), with the proportion with rents over 30% of income low (at 8%) compared with the Queensland proportion of 11.5%. The indications of rental stress are also low compared with the regional and State averages. Thus, the persons who would be exposed to difficulties if there was a substantial rise in rentals is more likely to be from the Indigenous community. For comparison, figures recorded for Kuranda, June quarter 2012 were: house 3 bedrooms $365; flat 2 bedrooms $250 indicating rises of 7% and 8% respectively, roughly in line with inflation.

The Centre for Aboriginal Economic Policy Research (CAEPR) results present a different view of Kuranda households to the ABS census data. The CAEPR study provides more reliable information on a small number of households probably fairly typical of the living conditions of Aboriginal people in the Kuranda area. The CAEPR study found that houses in the Kuranda area were highly overcrowded and composed of multiple generations of people connected through kinship relationships (refer Appendix 8C for further detail).

Table 11-25 also indicates that median monthly mortgage repayments at $1647 (Census 2016) are higher than for the rest of the Tablelands region and close to Queensland's median of $1733. Evidence of possible mortgage stress is demonstrated by the proportion with mortgage payments greater or equal to 30% of income which is substantially higher at 8.7% than for the rest of the region and compared with State averages of 6.4%. Additional local employment could assist with addressing this imbalance.

Table 11-25: Mortgage and rents, Census 2016

Mortgage and Rents	Kuranda SA2	Tablelands East SA3	Cairns SA4	Queensland
Median rents ($)	225	240	280	335
Households where rent more than 30% of household income	8.0%	10.5%	13.5%	11.5%
Median mortgage payments ($)	1647	1430	1597	1755
Households where mortgage payments more than 30% of household income	8.7%	5.7%	6.1%	7.2%

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

Consistent with the steady growth in population, there is an active market for house properties in the area. Data from Core Logic indicates the number of houses sold in the Kuranda area has been running at about 50-60 a year. Average median house price over 12 months to January 2017 was $406,000. This is higher than median house prices for Mareeba, which was about $350,000 over the same period (Source: Core Logic.).

Median allotment sales average about $140,000. There are relatively few units in the Kuranda area. Figure 11-2 shows some sales per annum, years ending July. Figure 11-2 also reflects the general downturn in the economy post GFC and during the high Australian dollar period, a recovery in 2013 and 2014 but moderating in 2016 and 2017.

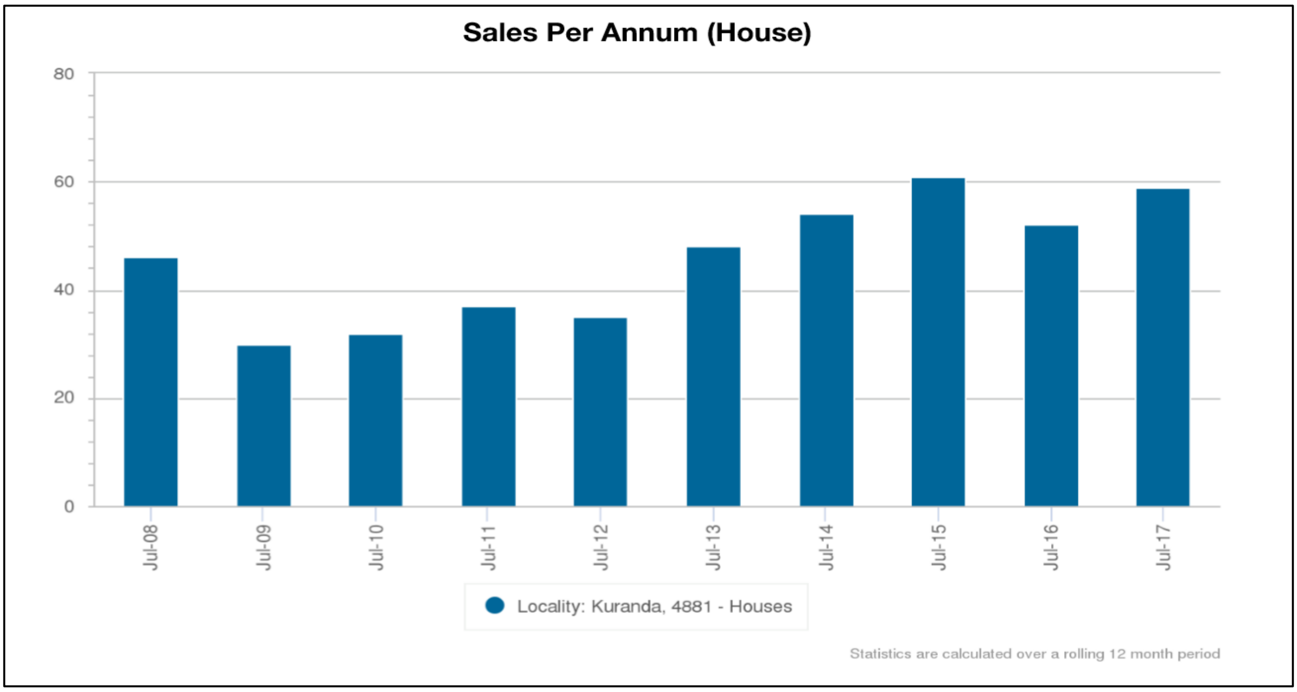

Figure 11-1: Sales per Annum (House), Kuranda area

Source: Core Logic.

Figure 11-2 shows the annual change in median house prices in Kuranda.

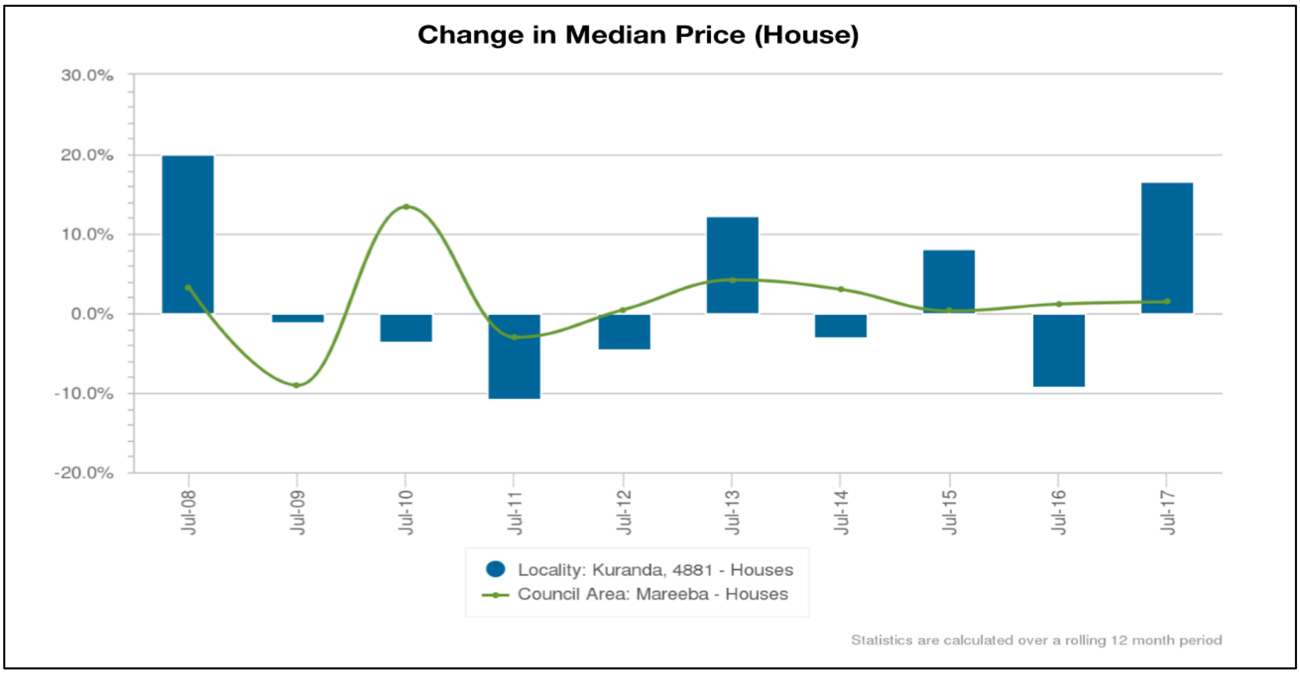

Figure 11-2: Change in median house prices, Kuranda

Source: Core Logic.

Figure 11-2 indicates that median prices dropped following the Global Financial Crisis (GFC) and during the high dollar period then rose in 2013-2015 but fell again in 2016 to be 8% above 2007 but in real terms, excluding inflation, down over 20% on 2007 prices.

Local enquiries in the real estate market indicate that there is virtually no stock of houses below $300,000 and prices range up to about $550,000 with mid-range about $450,000 (cf Core Logic $406,000 12 months to January 2017). It is a feature of Kuranda that there are many lifestyle acreages available. The indications are that the market is neither strongly over nor undersupplied.

Recent house sale prices, while recovering, are still down on before the Global Financial Crisis. If a rise in prices occurred, existing home mortgage holders would not be detrimentally affected and would have greater equity margin. However, a potential impact would be to discourage new residents in a lower income category moving to Kuranda.

11.1.17.1 Provision of social housing

In Kuranda, there are two distinct groups who are supplied with social housing:

1. Indigenous
2. Older residents.

For Indigenous social housing, the Ngoonbi Community Services Indigenous Corporation that has its offices in the Neighbourhood Centre in Kuranda and provides a construction service for local Indigenous housing.

Mareeba Shire Council provides community housing especially for aged and disabled with 14 units in Kuranda and a further 83 in Mareeba. In addition, homeless assistance is available through the Homelessness Services Hub (the Hub) in Cairns.

11.1.18 Incomes and socio-economic indices, health and wellbeing

Table 11-26 indicates that the median weekly incomes recorded in the 2016 Census for Kuranda were slightly above those for the Tablelands community but below those for the Cairns region and Queensland.

Table 11-26: Median weekly incomes, Census 2016

Category	Kuranda SA2	Tablelands East SA3	Cairns SA4	Queensland
Person ($)	530	528	642	660
Family ($)	1,293	1,242	1,475	1,661
Household ($)	1,125	1,009	1,226	1,402

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

Kuranda SA2 area has a Socioeconomic Disadvantage Index of 4 which puts it in a mid-position in the Cairns/Tablelands area that ranges from 1 to 8. However, within the Kuranda SA2 area, the Index ranges in different parts from 1 to 7 indicating the various elements in the population. For Education and Occupation, indices are higher, with an average of 6 consistent with an educated alternative lifestyle element.

Kuranda is located to be able to draw upon services of one of the State’s largest hospitals and allied health services complexes in Cairns and Mareeba hospital.

It has a well organised with a Neighbourhood Centre in the town that acts as a hub for information and delivery of family and cultural wellbeing, social and wellbeing and health and wellbeing services.

11.1.19 Economic structure of Kuranda, Atherton Tablelands and Cairns

Regional economies can be assessed by looking at activities that earn income from outside the area (base industries) that generate activity in the area. This activity then provides 'follower' activities such as retail, business, government services and utilities that account for more employment than the original base industries.

The **Kuranda** area has two dominant elements that earn income from outside the Kuranda area:

- Tourism, and
- The earnings of those residents working outside the area.

For the **Atherton Tablelands**, the dominant influences are:

- Agricultural and pastoral industries
- Sporadic mining activity
- Tourism
- Service functions relating to the wider Cairns regional area.

In the wider **Cairns** regional area, the dominant influences are from:

- Tourism
- Primary industries
- Mining
- Defence and surveillance.

Of great economic importance to the region's economy and its development is the pivotal role of Cairns as a transport hub:

Cairns International Airport is an important airport in northern Australia with direct links to ten Asia Pacific cities and long distance direct domestic links to Australia's five metropolitan cities. Cairns seaport is a key seaport in Australia in terms of vessel movements and base for a large reef fleet, fishing fleet, trading and work fleet and the Australian Navy's north east naval base. There are more commercial vessels registered in Cairns than any other Queensland port including Brisbane. Cairns is the north-eastern terminus for Australia's rail network and the national highway system, making it a natural transhipment point for supply of commodities further north, much of which takes place by ship.

11.1.20 Kuranda tourism – Day visitors

The total day visitors arriving in Kuranda by the Scenic Rail, Skyrail or coach (commonly using a mix of these modes) in the region of are estimated at 900,000 per annum. In addition, a substantial number of visitors arrive by private car (visitors and locals from the wider region) or rental cars (visitors). There are no available estimates of visitor numbers by car, but taking these arrivals into account, the indications are that annual visitation to Kuranda is likely to be of the order of one million.

Kuranda is promoted as 'The Village in the Rainforest'. Traditionally, most people will visit the Kuranda markets. However, a range of attractions, retail and food outlets have developed along the main street and the central town area. Public facilities in the town area are funded by a levy on rail and Skyrail passengers. Most visitors arrive by 10.00am and leave by 3.00pm.

In addition to visitors to Kuranda Village, the following local activities are available:

- 'army duck' rides on lagoons and through the rainforest, and the Pamagirri dancers at Rainforestation on the Kennedy Highway east of the township
- a paintball attraction is located west of Kuranda near the Kennedy Highway

- horse riding in the Myola and Speewah areas.

Data on average expenditure by day visitors is not available; however, most of the expenditure on transport to and from Kuranda would not accrue to Kuranda. Expenditure in Kuranda will include food and drink, attraction entrances and retail purchases (including art works). It is estimated that average expenditure per visitor excluding transport is likely to be of the order of $60 and total expenditure generated of the order of $60 million per annum (excluding transport).

11.1.21 Kuranda tourism - Overnight visitors

The Census 2016 identified the origin of the 307 visitors (refer to Table 11-27) that were recorded as staying overnight in the Kuranda area. This is a substantial growth of around 30% compared to the 2011 Census.

Table 11-27: Visitors, Kuranda Area, Census Night 2016

Origin	Visitors 2016	Visitors (cf 2011)
Queensland	116	(135)
New South Wales	37	(24)
Victoria	35	(27)
Other Australia	46	(3)
Sub total	**234**	**(189)**
Overseas	73	(43)
Total	**307**	**(232)**

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

The data in Table 11-27 may overstate typical numbers, as the 2016 Census was taken at a time of above average visitor numbers. The average number of visitors staying overnight in Kuranda on any given night of the year is therefore estimated to be in the order of 220/night, with total visitor nights estimated to be in the region of 80,000 per annum. Most of these, especially from within Queensland, are likely to have been staying with friends and relatives.

11.1.22 Atherton Tablelands and Cairns Region Tourism

As at Census 2016, the following visitor numbers/nights in Table 11-28 were recorded for the Cairns and Tablelands regions.

Table 11-28: Visitor Numbers, Census 2016

Origin	Tablelands East SA3	Cairns SA4
Queensland	2,071	13,457
New South Wales	420	5,203
Victoria	407	8,254
Other Domestic	428	4,985
Total Domestic	**3,326**	**31,899**
International	862	14,670
Overall Total	**4,190**	**47,569**

Source: Cummings Economics from Australian Bureau of Statistics, Census 2016.

Allowing for the 2016 Census returns to be towards the peak and the underlying average to be about 40,000/night for Cairns SA4 and 3,600/night for the Tablelands, total visitor nights in 2016 were likely to be in the order of 15 million per annum Cairns Region SA4 and about 1.3 million per annum on the Tablelands. Turning to total visitor numbers, Table 11-29 sets out the pattern between 2005-6 to 2015-16 which shows a steady increasing trend in domestic visitors and a return to increasing international visitor numbers.

Table 11-29: Visitor Numbers, Tropical North Queensland, 2005-06 to 2015-16[7]

Year	Domestic	International	Total
2005-06	1,512	865	**2,378**
2006-07	1,501	842	**2,343**
2007-08	1,498	818	**2,316**
2008-09	1,578	703	**2,221**
2009-10	1,467	655	**2,122**
2010-11	1,315	647	**1,962**
2011-12	1,576	614	**2,190**
2012-13	1,645	707	**2,352**
2013-14	1,626	691	**2,317**
2014-15	1,798	759	**2,557**
2015-16	2,043	860	**2,903**

Source: Cummings Economics from Tourism Research Australia.

For international holiday purpose visitors, the Cairns/TNQ region exceeds Brisbane's numbers and is similar to the Gold Coast but has lower numbers than Sydney and Melbourne. The origin of international visitors in 2015-16 was as follows in Table 11-30.

Table 11-30: Origin of International visitors to Cairns/Tropical North Queensland Region, 2015-16

Origin	Number
China	217,000
Japan	104,000
Other Asia	84,000
Total Asia	**405,000**
UK/Europe	245,000
US/Canada	132,000
New Zealand	43,000
Other	35,000
Overall Total	**860,000**

Source: Cummings Economics from Tourism Research Australia.

The Cairns/Tropical North Queensland region has slightly fewer hotel/motel serviced apartment rooms than Perth and well above the Adelaide tourism region, as specified in Table 11-31.

Table 11-31: Number of hotel/motel and serviced apartment rooms, September Quarter, 2016

Location	Number
Brisbane TR*[8]	15,726

[7] Numbers in thousands.
*TN= Tourism Region.

Location	Number
Gold Coast TR*	14,020
Perth TR	11,935
Cairns/Tropical north Queensland	11,202
Northern Territory	8,864
Adelaide TR*	8,169
Tasmania	6,863
Sunshine Coast TR*	6,046
Canberra	6,093

Source: Cummings Economics from ABS Cat. 8635.0.

The GFC, followed by a period of an extremely high Australian dollar, led to a contraction of the tourism sector in the Cairns region. A lower AUD in more recent years has seen a strong recovery take place with domestic visitors moving back above pre GFC peaks by 2014 and the international visitors increasing in 2016.

A feature of growth of tourism in recent years as detailed in Table 11-32 has been the emergence of China as a major source of visitors with an annual growth of 16.6% per annum.

Table 11-32: International visitor numbers from China to the Cairns/Tropical North Queensland Region

Year	Number
2005-06	39,529
2006-07	43,533
2007-08	53,783
2008-09	35,763
2009-10	53,932
2010-11	72,600
2011-12	92,274
2012-13	133,937
2013-14	142,218
2014-15	165,103
2015-16	216,726
2016-17	214,082
Av annual Growth 2005-06 to 2016-17	**16.6% pa**

Source: Cummings Economics from Tourism Research Australia IVS.

While 2016-17 saw growth in Chinese visitors decline, the commencement of direct flights to mainland Chinese cities in December 2017 is expected to see growth resume in 2017-18.

11.1.23 Income of Kuranda residents working outside the Kuranda area

2016 Census data indicates that 1,057 Kuranda residents were working outside the Kuranda area (i.e. 59% of the total workforce). Demographic indications are that this ‘locally expatriate’ working population includes a substantial proportion of professionals and others with relatively high incomes. At an average of $70,000 gross per annum, the amount earned by around 1,000 would therefore total about $70 million. Although not all of this amount would be spent in the area, it would make a substantial contribution to local economic activity.

11.1.24 Primary industries in Kuranda, Atherton Tablelands and Cairns Regions

The Australian Bureau of Statistics does not publish primary industry production data at Kuranda SA2 level. However, the 2016 Census indicates the following breakdown of the primary industry workforce in the Kuranda area.

Nursery production outdoor	12
Vegetable growing outdoor	12
Fruit and tree nut growing	5
Citrus fruit growing	3
Beef cattle farming (specialised)	4
Onshore aquaculture	3
Other farming	3
Total	**42**

A typical input/output ratio of employment to output in this field is 3 workers per $1 million. This ratio would give an estimated annual turnover in the order of $14 million for Kuranda employees undertaking primary industry related employment.

The Mareeba/Tablelands region is a major diversified area for agricultural, pastoral and other primary industry production. Latest available data (Figure 11-3) produced by the Queensland Department of Agriculture and Fisheries indicate a farm gate value of production of $550 million spread across a wide range of livestock and cropping activities.

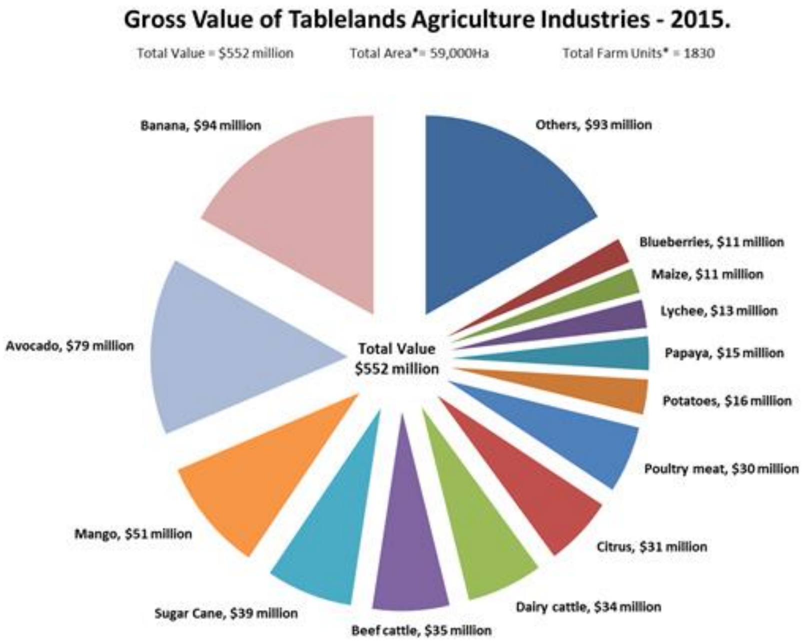

Figure 11-3 Tablelands' value of Agricultural production
Source: Queensland Department of Agriculture, Forestry and Fisheries, Mareeba.

Production is split between dairying and crops under natural rainfall in the Southern Tablelands area and an increasing amount under irrigation both within and outside the Mareeba Dimbulah Irrigation Area.

Apart from rural production on the Tablelands, there is strong agricultural production along the Tropical Coast, especially of sugar and bananas. Cropping has spread north to the Lakeland/Cooktown area in recent years (now about $50M). There is also an extensive amount of cattle production from the Gulf and

Peninsula areas. Additionally, the region has significant aquaculture production and Cairns is the home port of one of Australia's largest fishing fleets.

The value of primary industries in the region including processing and transport (sugar mills, dairy factories, abattoirs, sawmills, cold storage, bulk terminals) is estimated to be of the order of $2B a year, making it by far the leading primary production region in northern Australia. The region is the third largest fruit producing region in Australia.

Primary industry in the region is a significant growth sector that has been recording a real terms long-term average annual growth rate of about 2% per annum.

11.1.25 Creative industries

Historical studies of Creative Industries in the region have identified the special position of Kuranda as an area with a high concentration of creative industries per capita; well above the already relatively high level in the Cairns area - including artists, sculptors, jewellery making, creative writing and performing arts.

Typical input/output ratios in this field indicate a relatively high employment per million dollars of output (towards 6), indicating output per employee in the order of $170,000. This would imply an estimated turnover for Kuranda of $3.6M. However, it is likely that taking into account substantial part-time activity, output of the sector could be substantially more than this, perhaps in the order of $5M/annum.

Apart from Kuranda, most of this activity is located in Cairns city and Douglas Shire Council areas. A 2013 study for Cairns Regional Council indicated that the Cairns region had the highest concentration of creative industries per capita outside south-east Queensland.

11.1.26 Transport services in Kuranda, Atherton Tablelands and Cairns Regions

The position of the Kuranda township away from the Kennedy Highway means that of outside income from transport services which is common to many rural towns, is relatively low and mainly confined to the substantial service station at the Koah Road turnoff. Some transport employment is likely associated with the railway, Skyrail and the servicing of communication towers on local hilltops, but there is no data available on expenditure involved.

In the Mareeba/Tablelands area, the rapid growth of valuable horticultural produce for markets in southern Australia has led to the development of Mareeba as a transport hub, with major operators of long-distance road transports developing new freight centres on the Council's Industrial Estate. Mareeba airport is also developing strongly as a key aviation centre for the Tablelands and as an alternative to Cairns for aviation training and maintenance.

The importance to the Cairns regional economy of Cairns airport, seaport and the location of Cairns as the north-eastern terminus of the national road and rail network is discussed in Section 11.1.19.

11.1.27 Mining and Quarrying in Kuranda, Atherton Tablelands and Cairns Regions

The Kuranda area has a quarry operation that supplies gravel outside the Kuranda area.

A mining workforce of 29 was recorded as living in Kuranda SA2 at Census 2011 but none as residing and working in Kuranda, indicating that these 29 were probably FIFO/DIDO workers to mines in the region or elsewhere.

The Mareeba/Tablelands area has traditionally had substantial mining activity but it has been quite volatile. Latest production figures for 2015-16 indicate that production had fallen to about $17 million compared with over $300 million at former peaks. However, Mt Garnet operations have recently recommenced and an investment of $100 million is currently being made to restart operations (mainly zinc and gold) at Mungana near Chillagoe.

In the wider Cairns/Peninsula Australia geographic region, there is substantial mining income derived from operations at Weipa (bauxite) and at Cape Flattery (silica sand). Value of output (Queensland Mines and Energy data) in 2015-16 indicates that the annual total was over $800 million. These mining operations are supplied out of Cairns by road, air and shipping services.

In addition, there are substantial earnings from mining outside of the Cairns region:

- Fly-In/Fly-Out (FIFO) workforce and other air delivered services to mines and other industries in Central Queensland, North West Queensland, Northern Territory, Papua Indonesia and Papua New Guinea. At the peak of the mining investment boom, they were estimated to have a value of over $200 million/annum.
- About $180 million/annum of mine supply is earned via shipping services to Freeport-McMoRan giant copper and gold mine in Papua Indonesia.

11.1.28 Summary of outside earnings in Kuranda, Atherton Tablelands and Cairns Regions

In summary, the Kuranda area is located within and benefits from an economy based on strong and diversified earnings from the rest of Australia and overseas. The following summarises this socio-economic setting.

The turnover/output of Kuranda activities earning income from outside the Kuranda area is estimated at:

Day visitor expenditure	$60M
Overnight visitor expenditure	$5M
Earnings of residents working outside Kuranda	$70M
Primary industries, creative arts, road services	$20M
Total	**$155M**

Major earnings from the Mareeba/Tablelands area industries mainly earning income from outside the region were:

Agriculture and other primary industries (1)	$550M
Tourism (day) (2)	$110M
Tourism (overnight) (3)	$103M
Mining (4)	$17M
Total (5)	**$780M**

Notes:

1. *Source: Queensland Department of Agriculture, Forestry & Fisheries 2015. This figure is farm-gate and does not include processing, especially dairy products, stockfeed and chickens.*
2. *Tourism Research Australia 2016 for Tablelands LGA was $30m; Cummings Economics estimate for Kuranda (see Section 5.2.1) $60M plus estimate for the balance of Mareeba Shire $10m.*
3. *Tourism Research Australia 2016.*
4. *Queensland Department of Mines & Energy 2015-16. This figure is abnormally low. In recent times, has been as high as about $300m.*
5. *This amount does not include substantial turnover from facilities on the Tablelands servicing the wider region; including Lotus Glen Correctional Centre, main regional offices, Queensland Department of Agriculture, Forestry & Fisheries and significant aviation maintenance services at Mareeba airport.*

Major earnings from industries in Cairns/Peninsula Australia from outside the region include:

Tourism (1)	$3,100M

Primary Industries (2) ....(est.) $2,000M
Mining (3)... $830M
Trade Papua New Guinea & Papua Indonesia (4)........................(est.) $250M
FIFO (5)...(est.) $120M
Defence/Surveillance (6)..(est.) $210M
Other (7).. $200M
Total (5)... $6,710M

Notes:

1. *Tourism Research Australia 2016.*
2. *Cummings Economics 2015-16. An order of magnitude estimate including agriculture at farm-gate 2014-15 $1,467m (ABS), (Cairns SA4 plus Northern Gulf and Cook Resource Management Area) plus estimate for processing (sugar, dairy, chicken, meat, etc.), plus fisheries.*
3. *Queensland Department of Mines & Energy 2015-16.*
4. *Cummings Economics, includes estimated exports Freeport, Papua Indonesia $180m and airfreight Papua New Guinea $70m.*
5. *Cummings Economics based on detailed estimates 2014 of approximately $200m reduced to allow for some loss in recent years.*
6. *Cummings Economics includes estimate $200m HMAS Cairns and allowance for north-eastern surveillance operations, Cairns airport.*
7. *Cummings Economics – approximate estimate for international education $150m (Study Cairns estimate) and earnings from outside the region of marine and aviation servicing sectors Cairns.*

11.1.29 Construction and housing in Kuranda, Atherton Tablelands and Cairns Regions

Steady growth in population has led to active construction activity in the Kuranda area, the Tablelands and the Cairns SA4 region. Table 11-33 below, gives building approvals in terms of dwellings and overall value of approvals over the period 2011-12 to 2016-17. It is notable that the rate has slowed in the last two years.

Table 11-33: Building approvals

Year	Kuranda SA2	Tablelands LGAs	Cairns SA4
	Dwellings No.	Dwellings No.	Dwellings No.
2011-12	29	244	906
2012-13	33	180	878
2013-14	31	225	1064
2014-15	33	228	1241
2015-16	10	262	1255
2016-17	27	230	956
Total Value all buildings	**Kuranda SA2**	**Tablelands LGAs**	**Cairns SA4**
	$M	**$M**	**$M**
2011-12	$9	$86	$554
2012-13	$10	$86	$442
2013-14	$10	$98	$577
2014-15	$11	$83	$584
2015-16	$3	$96	$612
2016-17	$9	$90	$591

Source: Cummings Economics from ABS Cat. 8731.0.

Over this period, construction activity in the Cairns region has been relatively subdued compared to long-term data. Before the Global Financial Crisis and the impact of the high Australian dollar on tourism, building approvals at regional level were running at over $1B/annum. Lower construction rates in recent years mean that there is currently no oversupply in the market.

11.1.30 Local services in Kuranda, Atherton Tablelands and Cairns Regions

There is a substantial amount of specialist retailing involved with the tourist industry in Kuranda. However, local retailing and most other services are not highly developed.

With a small population and a large proportion of the population working elsewhere, Kuranda residents rely for much of their retail and other service needs on the facilities at Cairns (especially the large Smithfield Shopping Centre at the base of the Kuranda Range) and Mareeba.

The following Table 11-34 gives lists of employment by industry of Kuranda residents working locally compared with State averages.

Table 11-34: Workforce residing and working in Kuranda by industry, Census 2016

Industry Sector	Kuranda SA2		(cf Queensland)
	No.	%	%
Agriculture, Forestry and Fishing	42	*5.7%*	*2.8%*
Mining	0	*0.0%*	*2.3%*
Manufacturing	0	*0.0%*	*6.0%*
Electricity, Gas, Water and Waste Services	0	*0.0%*	*1.1%*
Construction	48	*6.5%*	*9.0%*
Wholesale Trade	13	*1.8%*	*2.6%*
Retail Trade	102	*13.9%*	*9.9%*
Accommodation and Food Services	77	*10.5%*	*7.3%*
Transport, Postal and Warehousing	27	*3.7%*	*5.1%*
Information Media and Telecommunications	0	*0.0%*	*1.2%*
Financial and Insurance Services	0	*0.0%*	*2.5%*
Rental, Hiring and Real Estate Services	12	*1.6%*	*2.0%*
Professional, Scientific and Technical Services	44	*6.0%*	*6.3%*
Administrative and Support Services	37	*5.0%*	*3.5%*
Public Administration and Safety	21	*2.9%*	*6.6%*
Education and Training	82	*11.2%*	*9.0%*
Health Care and Social Assistance	50	*6.8%*	*13.0%*
Arts and Recreation Services	40	*5.4%*	*1.6%*
Other Services	16	*2.2%*	*3.9%*
Inadequately described Not stated Not applicable	124	*16.9%*	*4.3%*
Total	**735**	***100.0%***	***100.0%***

Source: Cummings Economics from ABS Census 2016. Denotes Kuranda higher.

The profile in Table 11-34 shows a relatively high proportion of the workforce in Agriculture, Forestry & Fishing; Retail Trade; Accommodation & Food Services; Administrative & Support Services; Education & Training and Art & Recreation Services. The relatively high Retail Trade; Accommodation & Food Services; Arts and Recreation Services is likely to be attributable to the high level of tourism day visitors.

The relatively high Administrative and Support Services could possibly reflect businesses located in Kuranda for lifestyle reasons. Another feature is a low proportion Public Administration and Safety (not a main shire centre) and Health Care and Social Assistance (no local hospital) and low Financial and Insurance Services (low level of bank facilities).

Of businesses operating in Kuranda, some 60% had no employees and only 12% had five or more. The largest number were in Construction (81) followed by Professional, Scientific and Technical Services (45) and Rental, Hiring and Real Estate Services (44). The 35 classified as Manufacturing all had fewer than five employees and are likely to include bakeries and could include a number of craft type operations.

There are relatively high numbers in the Professional, Scientific and Technical Services category tends to indicate that a number in that field live and operate from Kuranda but offer services outside of Kuranda.

In the Mareeba/Tablelands LGAs there is a strong presence of retail trade, public administration and safety, education and training and health care and services. These services are especially located in the main urban centres of Mareeba and Atherton, where there are regional shopping centres and the main local government administration offices. The main Department of Agriculture, Forestry and Fisheries office is located in Mareeba, along with the Tablelands Patrol Group Police headquarters. West of Mareeba is the large Lotus Glen Correctional Centre. The two district hospitals in Atherton and Mareeba have among the highest patient throughput of district hospitals in northern and central Queensland, outside the main regional city hospitals.

While wholesale trade, information and media services, financial services, rental living and real estate, professional scientific and technical services and administrative support services are below State average, this is common to most rural areas. Substantial other services are also available including district newspapers in both centres, Radio 4AM in Mareeba, branches of all major banks, strong real estate and insurance services, equipment hire services, accountancy and legal offices.

At a Cairns regional level, Cairns City offers very strong retail services, bolstered by demand from visitors. Census 2016 indicates that, consistent with its larger population and tourism focus, the Cairns SA4 region has more employment in retail than any other region in northern Australia.

In tourism-oriented shopping, Cairns has one of the largest offerings in Australia outside of the major metropolitan centres and the Gold Coast. The region has a strong rental, hiring and real estate sector and administrative and support services equal or above State averages.

In public administration and safety, HMAS Cairns pushes the region above State averages. Education and training and health care and safety are at about state averages. There are two university campuses in Cairns (James Cook University - JCU) and Central Queensland University - CQU) and headquarters of a strong TAFE system.

Kuranda is located within about a half-hour drive of the Cairns and Hinterland Hospital and Health Services, one of the largest hospitals in regional Queensland. With close to 100,000 admissions annually, (Table 11-35) it is the largest in terms of patient admissions in northern and central Queensland.

Kuranda is serviced by six resident GPs, the Kuranda Community Health Centre and an Ambulance Station. Kuranda is about a half-hour drive from the major Cairns North Community Health Centre. For further information refer to Appendix 8A.

Table 11-35: Hospital and Health Services, Central & Northern Queensland, 2015-16

Area	Total Admissions
Cairns region	97,180
Townsville region	75,172
Mackay region	47,338
Central Queensland	61,500

Source: Cummings Economics from Health Service Annual Reports, 2015-16.

While information, media and telecommunication services, financial and insurance, professional scientific and technical services are below state averages, this is typical in regional areas.

11.1.31 Kuranda Residents - Access to facilities

Kuranda Area
Settlement in the Kuranda area is dispersed on comparatively large blocks of land and over a large area. Only a relatively small proportion of the population live in the Kuranda township itself, with groups of houses to the south, in the area west of the township, north and south of the Kennedy Highway, around Myola/Mantaka/Kowrowa, around Speewah and around the Clohesy River/Koah area. (Table 11-36).

Table 11-36: Distribution of population, Kuranda SA2 (usual place of residence), Census 2016

Area	Number
Kuranda township	305
Warril Drive area	339
Kuranda south	1094
Mona Mona	808
Myola/Kowrowa	855
Speewah	795
Koah	602
Total	**4789**

Source: Cummings Economics from ABS Census 2016.

Each of these areas is fairly distinct and without close inter-relationship. They are quite separate from those living in the township area and remain largely unaffected by the very large numbers of day visitors to the Kuranda Village Centre.

While most of the area's shopping and social facilities are in the Kuranda township area, smaller facilities are scattered through the area including a tavern/shop/petrol station at Speewah, a petrol station/shop/community hall at Koah, and a school at Myola and various other businesses operating from houses/farms dispersed through the area.

Mareeba Area
Facilities in Mareeba are a 20-25-minute drive from the Kuranda area and those in Atherton 40 - 45 minutes.

Smithfield and Cairns CBD
Smithfield Shopping Centre and associated facilities are a 25-minute drive by car down the Kuranda Range road. Cairns airport is a comfortable 35-minute drive and Cairns CBD is about 45 minutes away.

11.1.32 Community services

A survey of the existing services in Kuranda, Mareeba, Smithfield, Cairns and the Atherton Tableland and their capacities was carried out during July 2017. Due to the nature of surveying (telephone interviews and email requests), not all services chose to participate, therefore these results are the average of the data collected and an estimate of the services and their capacity. Contact details were found using Google Maps and Google Earth. Some of the data on education came from the website www.myschool.edu.au.

A total of 340 community services were contacted, with 94 respondents across the Community Services, Education and Health sectors. Respondents were asked to self-rank their current capacity (i.e. number of people supported), total capacity (i.e. theoretical maximum number of people that could be supported with current resources) and capacity to expand with existing resources (i.e. access to capital, land availability).

Table 11-37: List of survey respondents

Service Type	Sub-sector	Number of responses
Community Services	Bank	10
Education	Child Care	8
	Combination Primary School / High School	8
	High school	13
	Primary School	32
	Primary/High school	1
	TAFE	1
	Universities	3
	Disability Service / Aged Care Services	1
Health	Chiropractic	1
	Dentist	2
	Disability Services	3
	Emergency Services	2
	Hospital /Medical Centre	3
	Optometrists	1
	Pathology	2
	Pharmacy	3
Total		**94**

Since the township of Kuranda is the closest township to the proposed project, the baseline data collection for services in Kuranda was the focus of this survey. Basic community services included were: financial services (banking); educational services (child care, primary school, high school, TAFEs and universities); health services (aged care, disability, hospitals, medical centres and/or clinics); Indigenous services and emergency services. Given the close proximity of Kuranda to Smithfield, Mareeba, Cairns and the Atherton Tableland, services in these areas were also included.

Kuranda's total population in 2016 was 4,766 persons (Australian Bureau of Statistics, 2016). Results from this survey indicate that some services in Kuranda are currently at full capacity (i.e. bank, child care, and medical centre). Both, primary and high schools have room to expand as well as the Kuranda Health Healing Medical Centre. Further information regarding Indigenous living conditions and service requirements is provided in Appendix 8C and Cultural Heritage Chapter 17.

The only emergency service that provided information was the Kuranda Police Division which covers Kuranda (including Myola), Koah and Speewah. In this facility, they have nine operational officers, one Police Liaison Officer and one permanent part-time Administrative Officer. Custody offenders are transported to Mareeba or Cairns Watch houses. In general, emergency services in Kuranda rely on additional staff and facilities in Mareeba, Smithfield and Cairns. The Kuranda Police Station services approximately 500km2 division of the Tablelands Patrol Group in the Far North. The area covers an area similar to ABS Kuranda SA2 area. The station is not a 24 hour one, being open 8am to 3.45pm Monday to Friday with officers undertaking on-call related duties.

In Kuranda, 14 basic community service providers were contacted, out of these 9 (64%) provided information regarding their current capacity and room for growth (data below). According to the 2016 Census, most Kuranda residents (59%) work outside Kuranda, these and most Kuranda residents rely on services outside Kuranda to fulfil some needs (e.g. banking and health). The following section describes and presents the different services and their capacities across the region[9] .

In addition to community services, Kuranda also has several recreational and tourism services for locals and visitors to the region. These include an aquatic centre, tennis courts, recreational centre, pony club, library, community centre and visitor information centre.

11.1.32.1 Financial services (banking)

Bank services at Kuranda and Mareeba reported that they were at full capacity with current staffing arrangements (Figure 11-4). Kuranda has only one bank (Bendigo) and Mareeba has five. Smithfield has five bank branches and 20% room for growth, while in the region there are 19 bank branches with a total of 14% capacity for growth available.

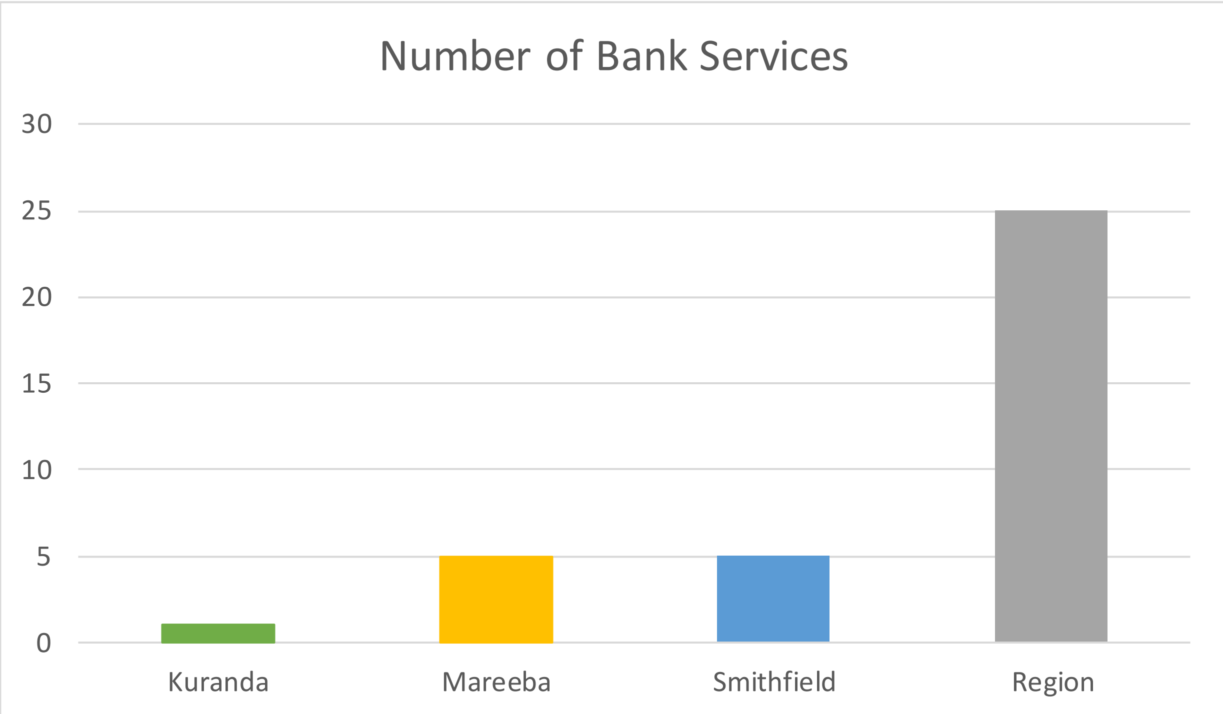

Figure 11-4: Number of Banks services per location.

[9] Region includes services in Cairns and the Atherton Tablelands. Community services providers contacted: Kuranda: 14; Mareeba: 37; Smithfield: 32; Region (Cairns and Atherton Tablelands): 257.

11.1.32.2 Education

Child Care services in Kuranda and Mareeba were reported at full capacity. Kuranda has only one Child Care Centre and Mareeba has four. There are five child care centres in Smithfield with a combined growth capacity of 43%. In the region, 26 more child care centres have potential for growth.

Child Care Services

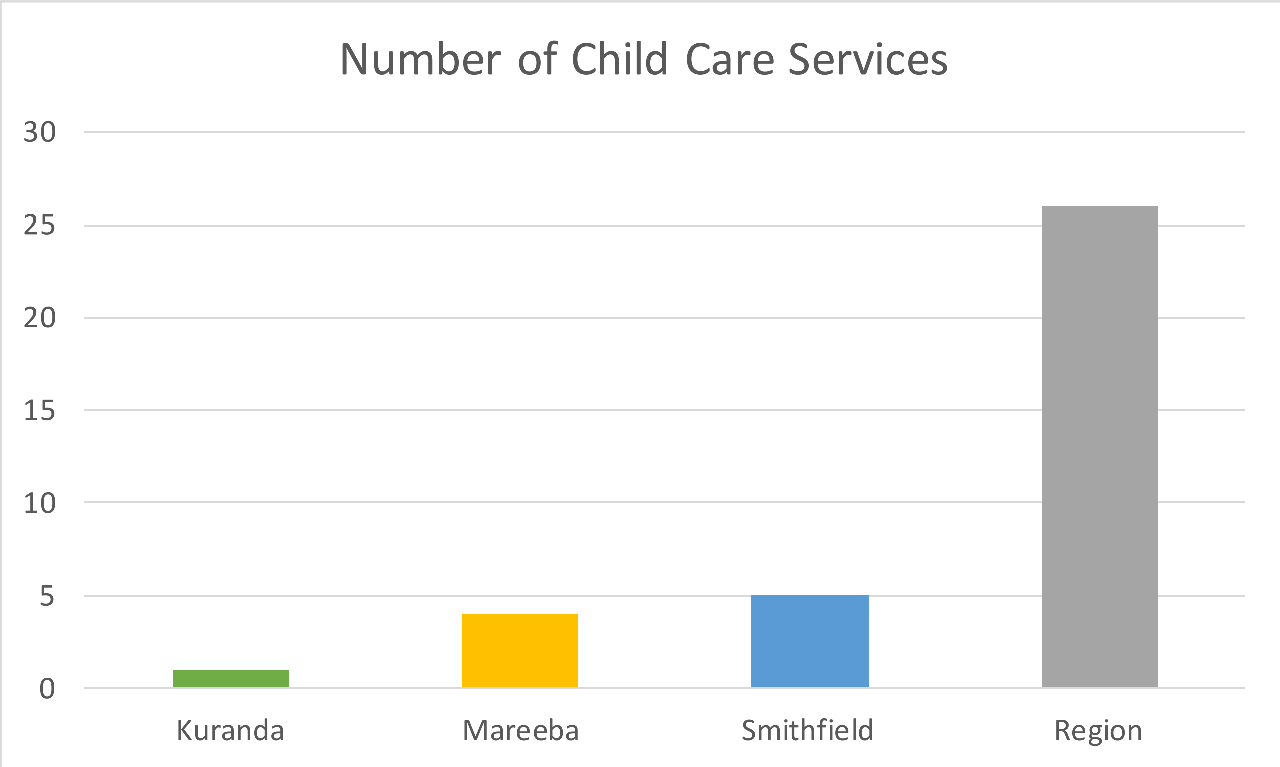

Figure 11-5: Number of child care services per location.

Primary School Services

The Primary Schools in Kuranda (2) have 11% room for growth, while Mareeba's Primary Schools (2) have 10% room for growth. In the region, there is an average of 21% growth capacity in primary schools.

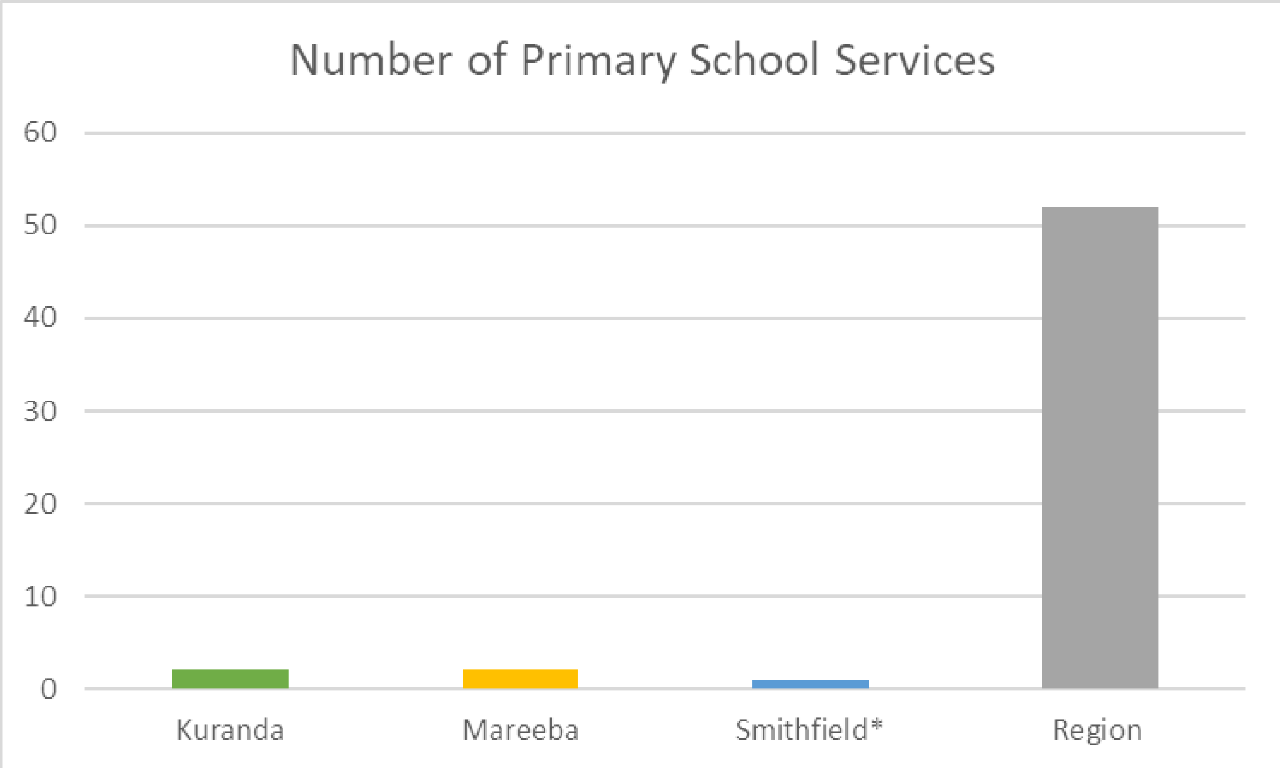

Figure 11-6: Number of primary school services per location.

*Smithfield does not have a Primary School, but the neighbouring Trinity Park suburb does. Due to its proximity, this Primary School was included.

High School Services

High schools in Kuranda (2) have an average 14% room for growth while Mareeba has only 3% room for growth is available. In Smithfield figures are similar with 4% room for growth. In the Region, there is an average of 54% of room for growth, based on the high schools that participated in the survey.

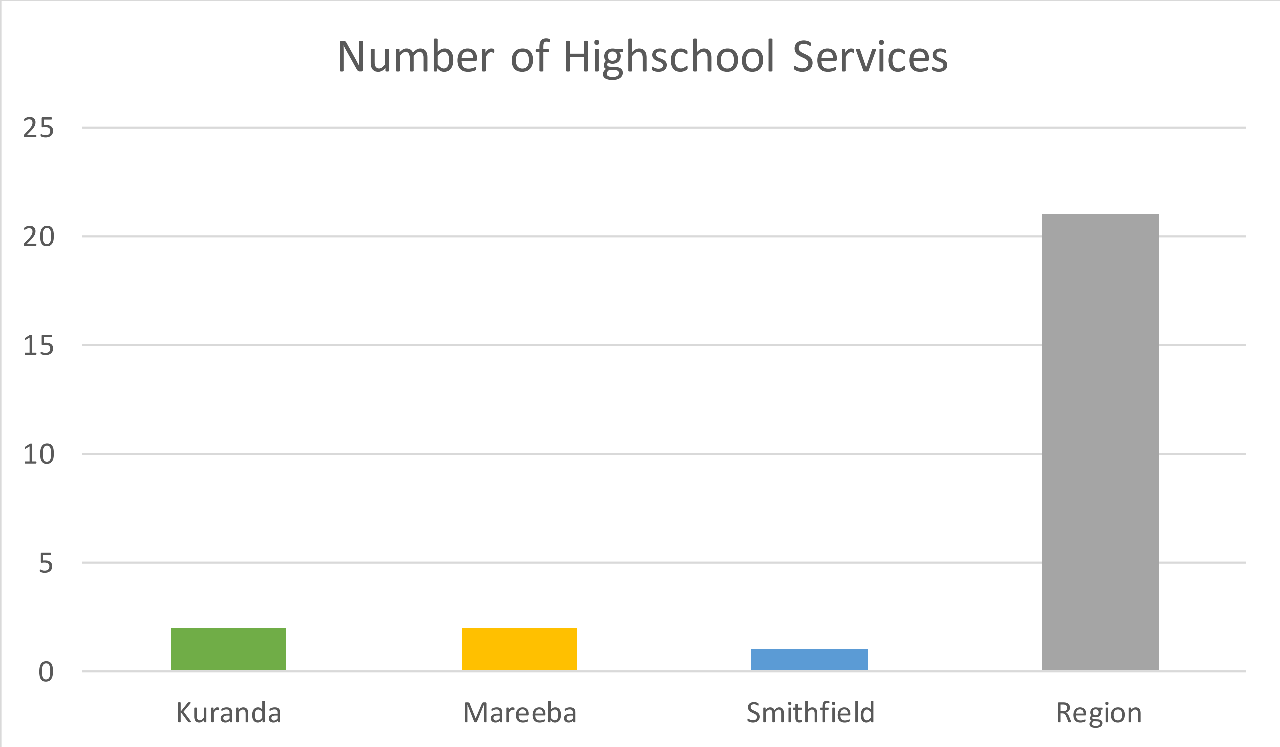

Figure 11-7: Number of high school services per location.

TAFE and University Services

There are no Technical Colleges (TAFE) or Universities in Kuranda or Mareeba (Figure 11-8). In Smithfield and the region there are several options for tertiary education including James Cook University, Central Queensland University, Cairns TAFE College and a number of private providers.

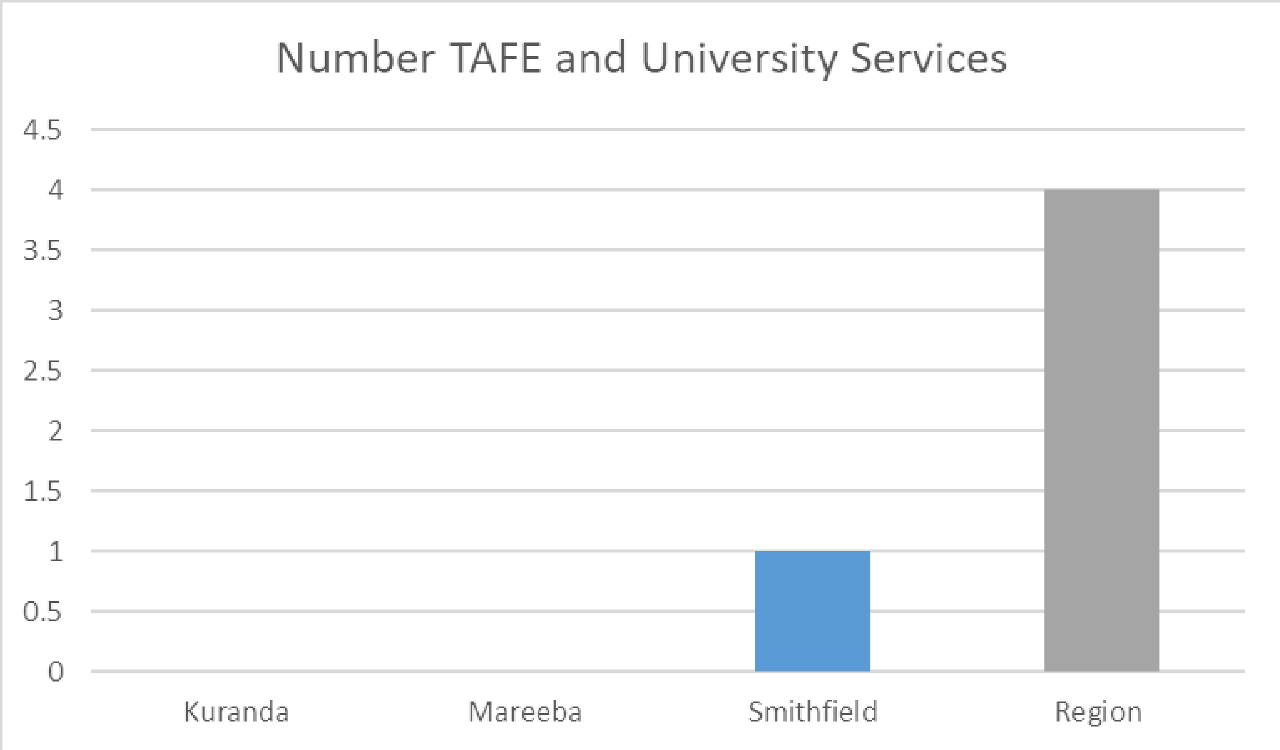

Figure 11-8: Number of TAFE and University services per location.

11.1.32.3 Health and Allied Health Services

Aged Care Services

Kuranda and Smithfield do not have any Aged Care services (Figure 11-9). Mareeba has two Aged Care Centres and within the region another 18 are available.

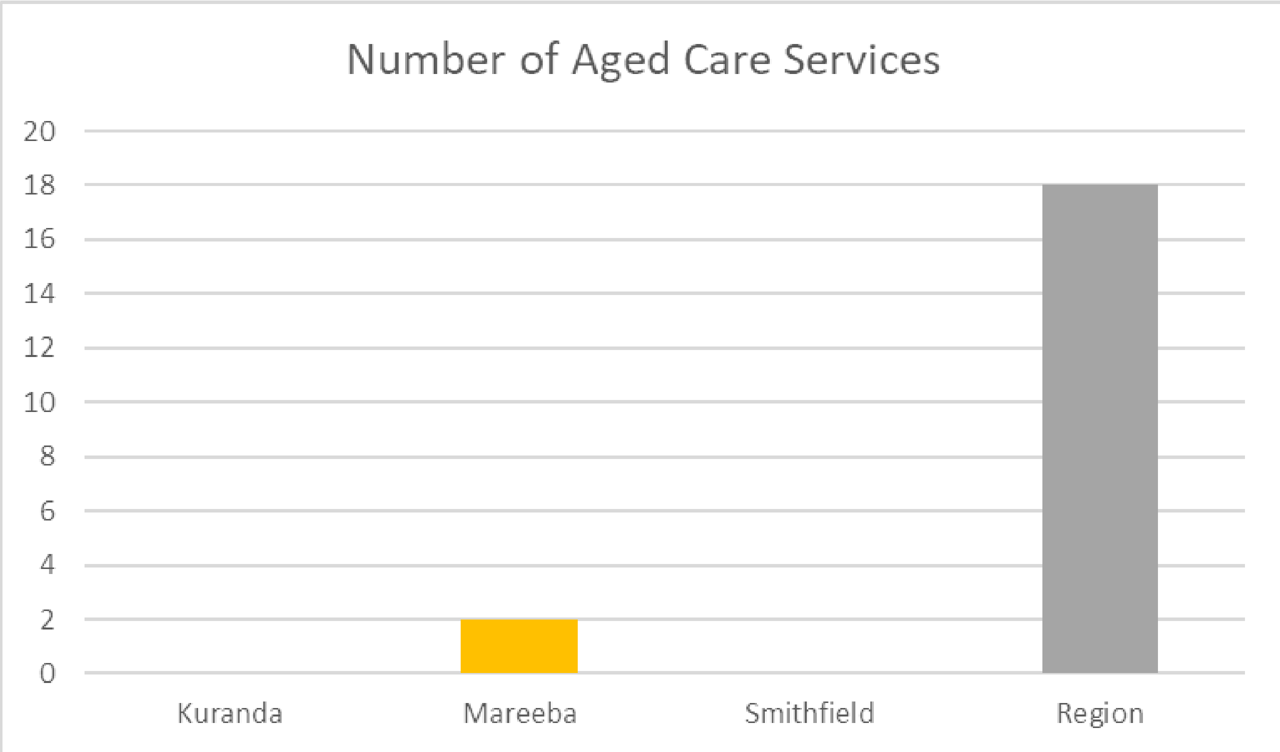

Figure 11-9: Number of Aged Care services per location.

Disability Services

Kuranda has only one Disability Service (A.W.A.R.E Dogs Australia Inc. Disability Services and Support Organization) while Mareeba has six that offer different services (Figure 11-10). Smithfield only offers physiological help while the region offers 30 different Disability Services.

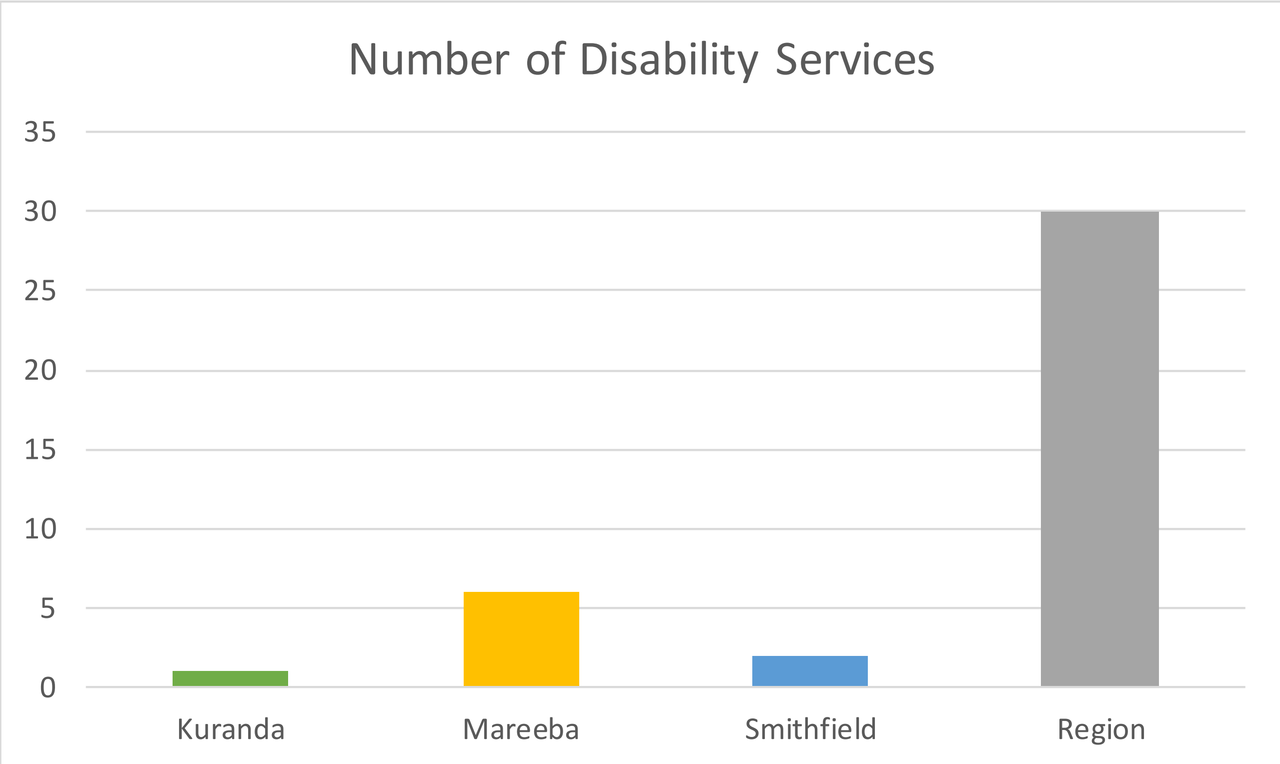

Figure 11-10: Number of Disability services per location.

Hospitals, Medical Centres and Clinics

Kuranda has two health services with an average room for growth of 20% (Figure 11-11), and a Medical Centre which is currently at full capacity. About a half-hour drive to the west is Mareeba Hospital, a substantial district hospital. In Mareeba there are four Hospitals, Medical Centres and/or Clinics, six in Smithfield and 36 in the Region.

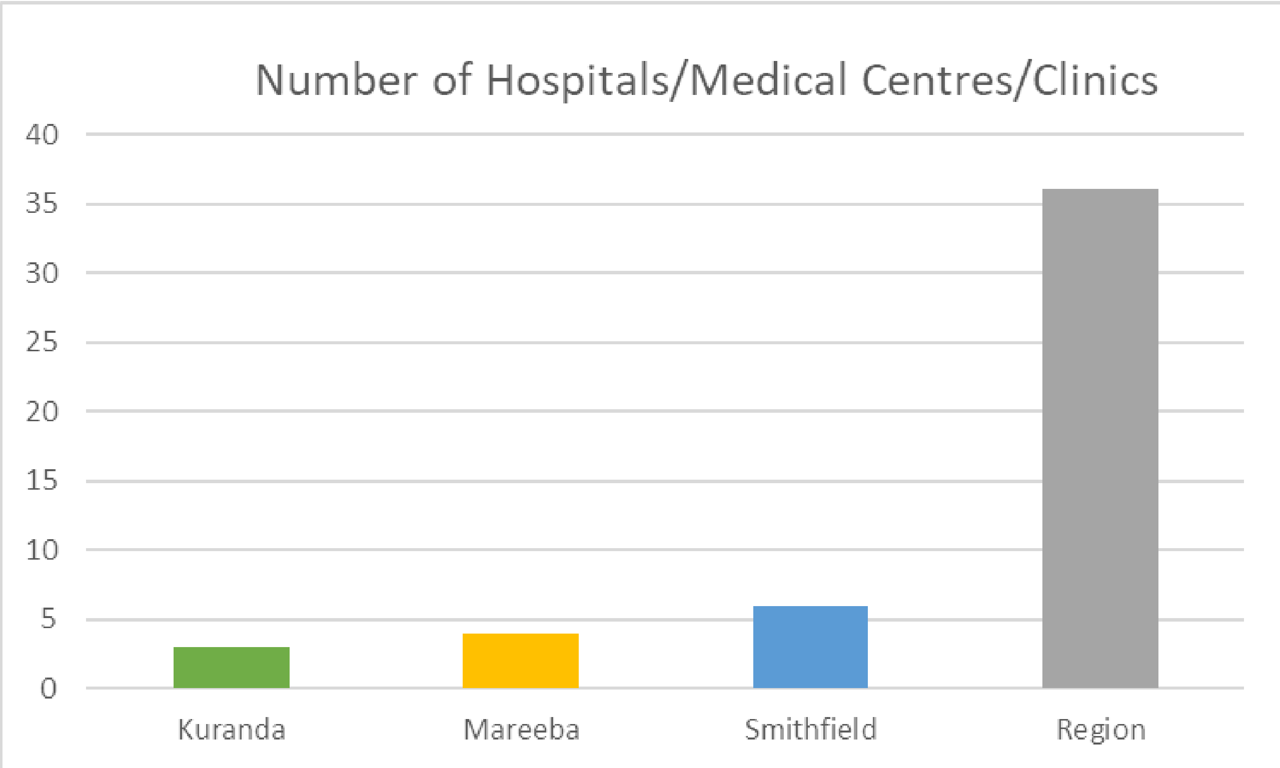

Figure 11-11: Number of Hospitals, Medical Centres and/or Clinics per location.

11.1.32.4 Indigenous services

There are two Indigenous Services in Kuranda, one in Mareeba and eight in the region (Figure 11-12). Due to lack response to the survey, data on the capacity and room for growth from all localities is not presented but further information on the Indigenous service requirements is presented in Appendix 8C

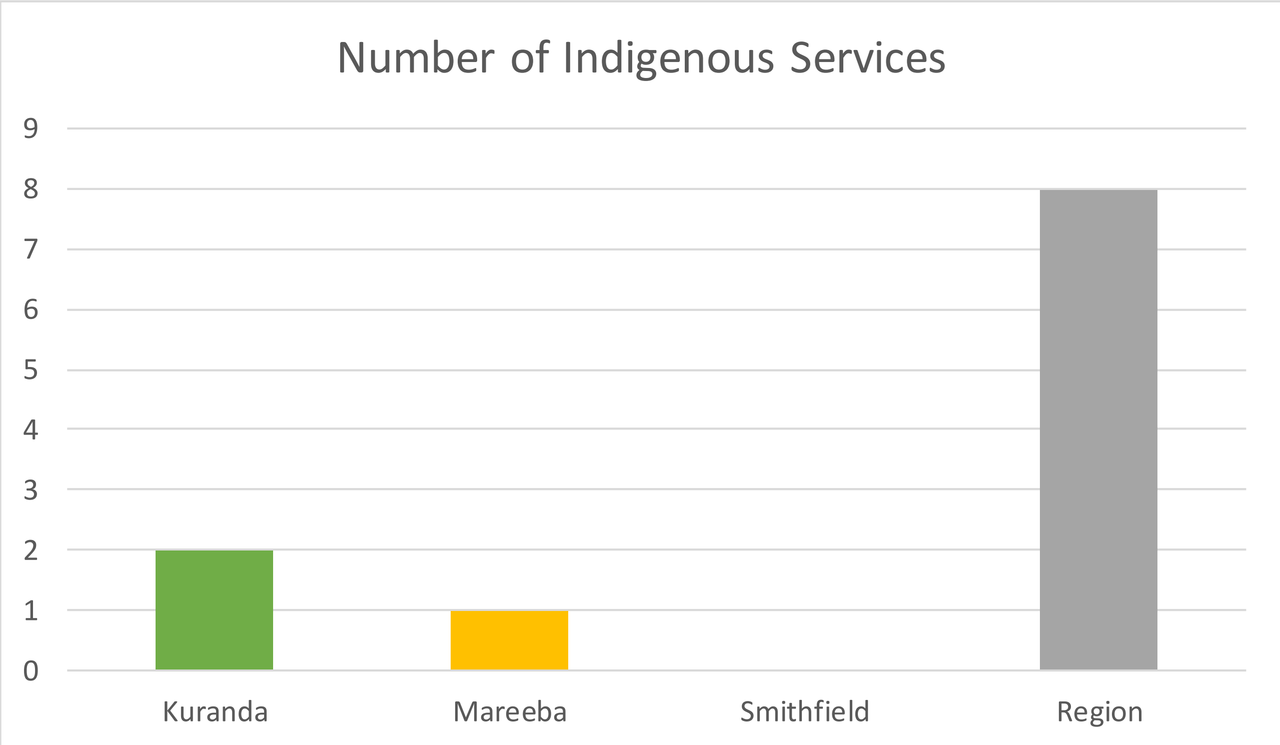

Figure 11-12: **Indigenous services per location.**

11.1.32.5 Emergency services

Kuranda has a Fire Station and a Police Station (Figure 11-13). The capacity of these services is difficult to measure due to the variability and nature of emergencies. As in Kuranda, emergency services in Mareeba, Smithfield and the Region, rely on additional (close) services if needed.

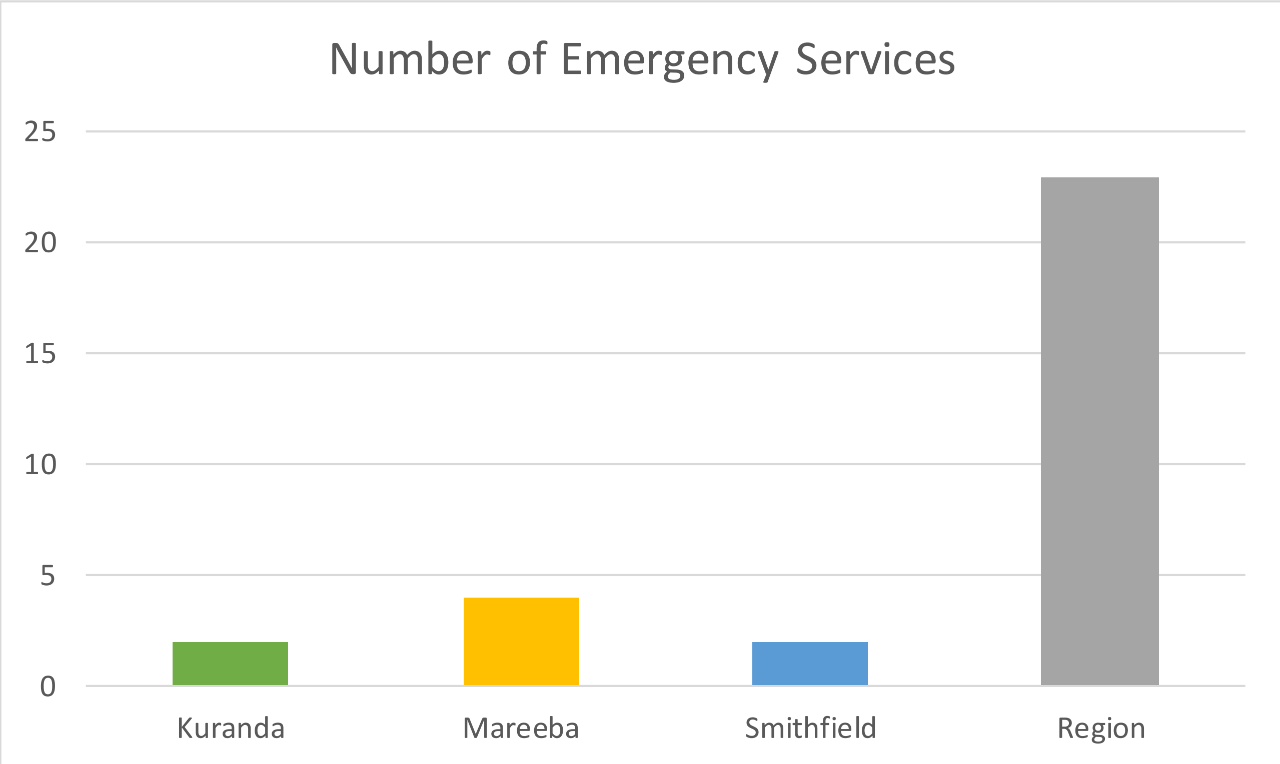

Figure 11-13: Emergency services per location.

11.2 Community Values

Feedback from the Stakeholder Engagement outlined in Section 11.3 has informed this summary of Kuranda community values. Most local residents enjoy being close to the rainforest and many value their private semi-rural lifestyle. A number of local community groups work to conserve and repair biodiversity in the area and educate the community on environmental issues and sustainable development.

Kuranda EnviroCare (EnviroCare) and the Kuranda Region Planning Group (KRPG) are volunteer community organisations that have been actively involved in different projects and activities to protect Kuranda's natural environment and residents' semi-rural lifestyle. The KRPG campaigns for sustainable development in the Kuranda Region and have a website with subscriptions to share ideas.

Local Aboriginal communities' experiences and values have been shaped by the history of the Mona Mona Mission which previously housed Aboriginal local people as well as people relocated from across North Queensland. When the mission closed in 1963 for a proposed dam, Aboriginal people living on the mission moved to the banks of the Barron River and established the townships of Mantaka and Kowrowa without any government assistance. These are the closest settlements to the KUR-World development proposal. Households in the Kuranda area are linked through kinship ties, which support each other economically and socially. Kinship ties is a key factor in determining where people live. Understanding the importance of kin and how history has shaped the communities and how people relate to each other is key to developing culturally relevant employment strategies for the Aboriginal communities (Refer to Chapter 17 Cultural Heritage).

Compared to non-Indigenous households in the same region, the households of Kuranda Aboriginal people are characterised by low employment with few full-time employees and very small numbers of people working for private industry. Household income is low, and many households are welfare dependent. Households typically hold multiple generations of kin relations, with high ratios of youth.

On 9 November 2012, the Wet Tropics World Heritage Area's Indigenous heritage values were included as part of the existing Wet Tropics of Queensland National Heritage Listing. The listing identifies Rainforest Aboriginal heritage as unique to the Wet Tropics and as a remarkable and continuous Indigenous connection with a tropical rainforest environment. The National Heritage Listing is based on four key criteria: the development of cultural techniques for the use of toxic plants; technical achievements in material culture and use of fire; year-round occupation of rainforest; and traditions established by creation beings. Aboriginal walking tracks are significant cultural heritage features in the Wet Tropics rainforest. Walking tracks are significant because they guided access through the dense impenetrable rainforest and linked campsites, bora grounds and resources as well as providing links between coastal and tableland resources and into neighbouring estates (Appendix 8C for further information on Indigenous cultural heritage and values).

11.3 Stakeholder engagement

11.3.1 Objectives of consultation and engagement

Stakeholder engagement and consultation are intended to contribute to the following aims and objectives:

Project specific

- Define the vision and expectations of stakeholders regarding KUR-World's construction and operations
- Seek input from stakeholders to consider planning, construction and operation issues
- Seek input and participation from the local community

- Understand and respond to the concerns of stakeholders regarding impacts and opportunities associated with the project.

General objectives for stakeholder engagement

- Promote open lines of communication between the project and the local community
- Ensure members of the local community are informed about important issues affecting them
- Ensure community members' knowledge, experience and perspectives are considered
- Encourage positive relations between the project and the local community based on mutual trust and understanding
- Manage expectations and build consensus
- Alert the project to community issues, concerns and grievances at the earliest stage.

Implementation of the Stakeholder Engagement Plan (Appendix 9) should mitigate against the following potential problems:

- Misunderstandings/confusion over KUR-World leading to rumours/untruths
- Community expectations regarding environmental, economic and social impacts of the project

11.3.2 Identification and analysis of potential stakeholders

11.3.2.1 Key stakeholders

Stakeholders for activities that include planning, construction and operation of KUR-World fall into nine broad categories. Members of each category are listed in Table 11-38. The degree of interest, influence and impact varies widely between stakeholders and is discussed further below in Table 11-39 and Figure 11-14.

Table 11-38: KUR-World Eco-Resort Potential Stakeholders

Stakeholder Category	Stakeholder
Project proponent, employees and contractors	• Reever & Ocean Developments (proponent) • Develop North • ARUP • Cardno • Natural Resource Assessments (NRA) • Sustainable Solutions Global (SSG)
Government	• Local Government – Mareeba Shire Council – Cairns Regional Council – North Queensland Land Council – Kuranda Police Station – Tablelands Regional Council • State Government Departments – Environment and Heritage Protection – Natural Resources and Mines – Infrastructure, Local Government and Planning – Department of Transport and Main Roads – Education Queensland

Stakeholder Category	Stakeholder
	− Aboriginal and Torres Strait Islander Partnerships − Science, Information Technology and Innovation − Queensland Health (Cairns and Hinterland Hospital and Health Service) − Tourism and Events Queensland − Social Services Queensland − Housing and Public Works − Department of Agriculture and Fisheries − Department of National Parks, Sports and Racing • Commonwealth Government − Department of the Environment and Energy − Federal Member for Leichhardt − Member of Parliament for the electorate of Barron River − Australian Institute of Aboriginal and Torres Strait Islander Studies
Aboriginal Parties and Indigenous (Bama) Neighbours	• Cairns Regional Claim Working Group – including Willie Brim and Astro Brim as representatives of the Bulwar aboriginal group. • Djabugay Tribal Aboriginal Corporation • Mona Mona Mission ex-residents • Kowrowa Township residents • Mantaka Township residents Refer Appendix 8C for further detail on the Rainforest Bama Aboriginal people.
Neighbours	• Immediate neighbours and residents surrounding the proposed development
Local Residents	• Kuranda residents • Speewah residents • Koah residents • Cairns residents • Tablelands residents
Local Community Groups	• Kuranda Regional Planning Group • Friends of the Earth Kuranda • Kuranda Conservation Community Nursery Inc • Kuranda EnviroCare Inc • Kuranda Visitor Information Centre volunteers • Kuranda Neighbourhood Centre
Natural Resource Management/Regional Community Groups	• Wet Tropics Management Authority • Great Barrier Reef Marine Park Authority • Terrain NRM • Cairns and Far North Environment Centre (CAFNEC) • Rainforest Reserves Australia • Regional Development Australia, Far North Qld and Torres Strait Inc • Tablelands Futures Corporation • Tropical Tablelands Tourism
Local & Regional Business and Industry Groups	• Advance Cairns • Cairns Chamber of Commerce • Mareeba Chamber of Commerce • Mareeba District Fruit and Vegetable Growers • Taste Paradise Regional Food Network • Cairns Airport Pty Ltd • Central Queensland University – Cairns Campus

Stakeholder Category	Stakeholder
	• James Cook University - Smithfield Campus • Kuranda Scenic Railway • Skyrail Rainforest Cableway • Study Cairns • Tourism Tropical North Queensland • Quality Innovation Training & Employment (Q.I.T.E) • My Pathway • TAFE • Skill360 • Centacare FNQ

Community Reference Group (CRG)	• Stakeholders representing key interests and parties (refer to CRG Charter)
	    • Local Environment, Community and Planning
	    • Neighbours/Local residents
	    • Indigenous
	    • Local Business
	    • Regional Agriculture and Business
	    • Regional Tourism
	    • Local Education
	    • Regional Social Services
	    • Regional Development
	    • Natural Resource Management
	    • Legal Matters
	    • Town Planning and Eco-certification

11.3.2.2 Stakeholders' main interests

Table 11-39 shows the main values identified in and detailed in Appendix 9. They may be of interest to a particular stakeholder category or they may be common concerns.

Table 11-39: Values of interest to stakeholders

Stakeholder Category	Environment	Social	Economic
Project proponents, employees and contractors	✓	✓	✓
Government	✓	✓	✓
Traditional Owners	✓	✓	✓
Immediate Neighbours	✓	✓	-
Local Residents	✓	✓	-
Local Community Groups	✓	✓	-
Natural Resource Management/Regional Community Groups	✓	✓	-
Local & Regional Business and Industry Groups	-	✓	✓
Community Reference Group (CRG)	✓	✓	✓

11.3.2.3 Stakeholders' influences

Figure 11-14 below, shows the overall level of interest stakeholders may have in the project and their influence or power in terms of decision-making, political influence, governance and/or support. Increasing stakeholder interest in the project is shown on the horizontal axis, while the vertical axis shows increasing stakeholder influence or power. The position of a stakeholder in the grid relative to interest and influence is neither absolute nor static and may not reflect the full reality. However, it provides the basis for initiating engagement with stakeholders. Engagement efforts should focus on the highest priority groups, while providing less influential stakeholders with general information and access to information through appropriate and established communication channels.

Strategies to engage stakeholders depending on their level of interest and influence include the following.

Key Player:

- Focus efforts on this group
- Involved in governance and/or decision-making bodies
- Engage and consult regularly

Meet their needs:

- Engage and consult on area of interest
- Assess whether they are a key player

Show consideration:

- Keep informed and consult on key issues

Peripheral Player:

- Inform via appropriate and established communication channels (e.g. newsletter and website)

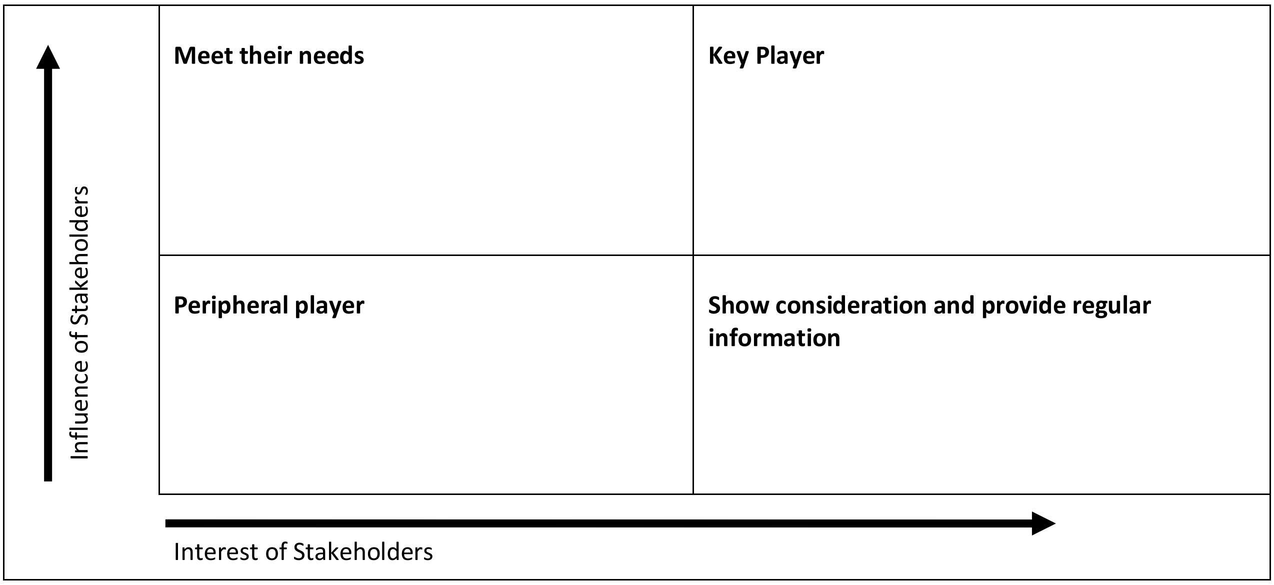

Figure 11-14: Stakeholder interest and influence. Adapted from Eden and Ackermann (1998).

The key stakeholders in the context of the KUR-World EIS are as follows:

- *Government* – Commonwealth, State and Local (Mareeba Shire) who are involved in the approval process were involved in formal meetings to discuss progress.
- *Project proponent and contractors* – the overall plan for the proposed development (2017 masterplan) was an iterative process that required regular and ongoing meetings with the EIS specialists as studies progressed and feedback from key stakeholders was received (refer Chapter 4 table 4-1).
- *Aboriginal Parties* – although Native Title has been extinguished on the proposed site, cultural heritage values need to be protected (refer Appendix 8C). Additionally, this is the most economically disadvantaged group within the Kuranda region with young families and the people for whom the project could offer the greatest economic opportunities. Members of this group were involved in meetings and site inspections to develop the Cultural Heritage Management Plan (CHMP) and were represented on the Community Reference Group. A special Open Day for Indigenous (Bama) people surrounding the project was held.
- *Immediate Neighbours* – the proposed site is in part surrounded by rural residential development, some of these residents are concerned about the impacts of noise, visual amenity, traffic, habitat loss and water resources (including water quality). A proportion of these concerned residents are elderly or approaching retirement. Many of these residents moved to the region for lifestyle reasons and many are involved in the creative industries or have professional qualifications. Consultation with immediate neighbours revealed that this group is generally not interested in the economic opportunities presented by the proposed project, are concerned about maintaining their current lifestyles and are actively involved in community groups that protect the environmental values of the area. However, some of the more elderly neighbours, attended the Open Days and were interested in the residential opportunities of the development as a low-maintenance accommodation option.
- *Community Reference Group* (includes members from the above groups) – this voluntary forum was established to represent the interest of the key players as well as community members that are concerned but less able to provide feedback or access information about the project. The meetings commenced in December 2016 and occurred throughout 2017. The meetings included presentations from the project team as information from the studies became available. The Charter

for this forum was revised several times during 2017 to accommodate diverse views and expectations.

- *Local residents* (from the wider population surrounding Kuranda and across the Tablelands and Cairns) – many of these stakeholders have expressed an interest in the project and have requested regular updates on issues of broader concern such as protection of endangered species, traffic management and economic opportunities. Over 300 people have subscribed to the regular updates available on the project website and over 140 people visited the Pop-Up Stall to ask questions. Local residents also have access to updates printed on the local papers and to radio and television updates.
- *Local NGOs and community groups* – many of Kuranda residents who are retired professionals or who have skills in the creative industries are involved in local community groups. Different environmental groups have been established, each with slightly dissimilar objectives, these include Kuranda Envirocare, Kuranda Friends of the Earth and Kuranda Conservation Community Nursery. There are also numerous organisations for community volunteers such as the Country Women's Association, Kuranda Garden Club, Kuranda Recreation Centre, Kuranda Visitor Information Centre and Kuranda Community Centre. In 2015, local environmental groups formed a coalition called the Kuranda Region Planning Group to provide input into the revised Mareeba Shire Council Planning Scheme.

11.3.2.4 Engagement mechanisms

Community consultation and engagement is a dynamic process. Initial consultation commenced with immediate neighbours in September 2016. Following initial consultation, a formal stakeholder analysis was undertaken and preliminary engagement and consultation strategies implemented from October 2016 onwards. A variety of mechanisms have been used and new ways to engage and consult interested parties have been developed and implemented during the EIS. Below, a list of the different mechanisms used to date:

- *Formal meetings*: These meetings were held between project team members and key stakeholders on the Community Reference Group to discuss progress regarding infrastructure, environment and community issues. Formal meetings were also held between project members, the Coordinator General office and government agencies. These meetings were to report progress and seek advice on particular issues and were used to make progressive adjustments to the 2017 masterplan (refer Chapter 4 table 4-1).
- *Public forums*: Open Days at Barnwell Farm. Two days held on Saturdays were open to the public, advertised in the local paper, on radio and via project website e-blasts. They were used to present information, visit the proposed project site; and answer questions and record concerns. Due to limited parking on site, transport to the site was arranged by shuttle bus from the nearby High School carpark to ensure the safety of all participants. Pre-bookings were required for catering and transport arrangements. One Open Day planned for immediate neighbours in February 2017 had to be cancelled due to severe wet weather conditions which made the project site unsafe. This was later rescheduled as part of the General Open Day in February 2017. A second Open Day was held during June 2017 for residents who could not attend the first Open Day. Feedback was received during the Indigenous cultural heritage studies that a special Open Day on a Sunday for the local Indigenous community would be appreciated. This was organised and implemented in September 2017.
- *Kuranda Pop-up Stall*: This fortnightly activity was located outside the local grocery store (Foodworks Kuranda). It was staffed by at least two members of the project team who answered questions and gathered information from locals, including their views, concerns and feedback. During this time, survey forms were distributed and collected (hard copies and/or electronically),

and questions were answered as information from different studies became available. The time of this activity, from 5-7pm was chosen to inform local residents (not tourists) who did not receive other forms of electronic or written media; or who worked away from Kuranda during the day. If information requested was not available at the time of the request, a response was forwarded at a later date.

- *Focus Group Discussions*: Presentations at regular or special meetings as required. These meetings have included events with the Mareeba Shire Council, The Wet Tropics Management Authority, Aboriginal parties and different government agencies.
- *Newsletters and Fact Sheets*: Include the latest information regarding the project and are issued to subscribers, posted on the KUR-World webpage (www.kur-world.com) and included in local and regional newspapers (Kuranda, Cairns, Atherton and Mareeba)[10].
- *Webpage*: electronic newsletter, e-blasts, survey form, regular project updates, business register, charter and minutes of Community Reference Group meetings. Questions or comments posted to the project website or email (info@kur-world.com) are answered in a timely manner.
- *Question and Answers* – a preliminary Question & Answer proforma was developed and distributed. This will be updated upon completion of the draft EIS and redistributed via the website and local newspapers.
- *Survey* – based on issues raised at the community meeting at the Kuranda High School in October 2016, a survey form was designed to ascertain the importance of various environmental, social and infrastructure concerns. The issues were listed and respondents could tick whether this was an issue of high, medium or low concern. This survey was uploaded onto the KUR-World website and mailed to 8,327 residents and postal boxes in Kuranda, Mareeba, Smithfield and Cairns. The survey was also provided at the Pop-Up Stalls, Open Days and handed out to members of the Community Reference Group. Locations to collect the surveys were provided in Kuranda and Mareeba; a postal address was also provided to mail the surveys.

All comments, feedback, suggestions and issues raised by the community were assessed by the stakeholder engagement team. Issues that required feedback and negotiation were responded to in a timely manner and all issues that were identified as important matters for the community (e.g. protection of endangered species, water quality, job opportunities), were discussed and negotiated through formal meetings. The master plan, infrastructure requirements and/or environmental monitoring and management plans have been modified and updated to address these concerns (refer Chapter 4, table 4-1). These important issues were also discussed within the Community Reference Group meetings where the project team presented findings of the studies, clarified misunderstandings, showed changes/updates to the master plan and discussed potential strategies to avoid and/or mitigate any potential impacts (refer to Appendix 9 for further details). Feedback received from all the stakeholder engagement strategies have been taken into account to develop the master plan and avoid/mitigate any potential impacts (refer Chapter 4, table 4-1). For further information regarding these strategies refer to Chapter 21 (Environmental Monitoring and Management Plan).

[10] The project's website has 368 subscribers. The Cairns Post prints 26,000 copies on the weekend edition, the Kuranda Newspaper prints between 4,440 and 4,900 copies monthly, the Tablelander weekly newspaper reaches about 39,000 people in the Atherton Tablelands and The Mareeba Express prints 11,500 copies every Wednesday.

11.3.3 Stakeholder engagement during preparation of the EIS

The established communication mechanisms have been used to develop an Engagement Plan for stakeholders with the frequency and type of engagement dependent on their level of interest and influence. The plan that was implemented during the EIS preparation process is summarised in Table 11-40 below (refer to Appendix 9 for further details).

Table 11-40: Engagement mechanisms

Stakeholder Group	Frequency* and mechanism					
	Formal meetings	Open Days	Kuranda Pop-up Stall	Focus Group Discussions	Newsletters and Newspapers	Webpage/ Q&A/Community Survey
Project proponents, employees and contractors	D	D	A	D	B	D
Mareeba Shire Council	D	D	-	D	B	D
The Coordinator-General	D	-	-	D	B	D
EPBC	D	-	-	D		D
Aboriginal Parties	D	D	A	D	B	D
Immediate Neighbours	D	D	A	D	B	D
Local Community Groups	D	D	A	D	B	D
International NGO's and Regional Community Groups	D	D	-	D	B	D
Local Business and Regional Industry Groups	D	D	A	D	B	D
Community Reference Group (CRG)	C	D	-	D	B	D

**Frequency: A) fortnightly; B) monthly; C) every two months; D) as required. See Appendix 9 for further details.*

Other mechanisms have been used to gather information, communicate the aims of the project, respond to concerns, engage interested stakeholders and inform the general public. These include: Local ABC Radio, Channel 7 News, emails and telephone calls.

As mentioned above, community consultation and engagement strategies incorporated new elements as the EIS studies progressed. Examples of new mechanisms include the Pop-Up Stall in Kuranda (commenced in March 2017), the mail out of survey forms to local residents (May 2017) and a special Open Day for the local Indigenous (Bama) community in September 2017. These strategies were suggested during Open Days, CRG meetings and focus group discussions and were implemented as soon as it was feasible.

The objectives of the communication strategies have varied as the project progressed. The first engagement mechanisms were designed to inform stakeholders about the development and provide facts. The initial stages of community consultation also focused on gathering community concerns and in understanding their interests in the project. As the EIS studies progressed, the engagement mechanisms communicated their findings and potential strategies to avoid and mitigate any potential impacts that concerned the community. Throughout all project stages community's feedback, comments and concerns have been received and addressed in a timely manner. These comments have also been incorporated to the project design and to the mitigation and management strategies (refer Chapter 4, table 4-1 and Chapter 21 for further details).

11.3.3.1 Key messages and communication strategy

Key messages and Fact Sheets were developed for the different stages of the project. All messages have been evidence-based on results of the EIS studies. During the planning and approval processes, stakeholder engagement has aimed to obtain input from the stakeholders on the following matters:

- Key issues, concerns, interests and opportunities
- Early visioning for potential negative and positive impacts of the project
- Input for managing potential negative impacts and enhancing positive outcomes
- Impacts of project on immediate neighbours
- Impacts of project on the lifestyle of Kuranda residents
- Opportunities for local residents
- Advice on preferred stakeholder methods for consultation and engagement.

11.3.3.2 Community comments on design and outcomes of the project

Ideas, concerns and feedback from the community have been documented in the survey forms, community reference group meetings' minutes, the KUR-World email account and email accounts of the project team. Concerns have been registered and addressed in newsletters, factsheets, Open Day presentations and general information recorded on KUR-World's website.

Figure 11-15 below shows how the different mechanisms, information and feedback from stakeholders were incorporated into the design and outcomes of the project.

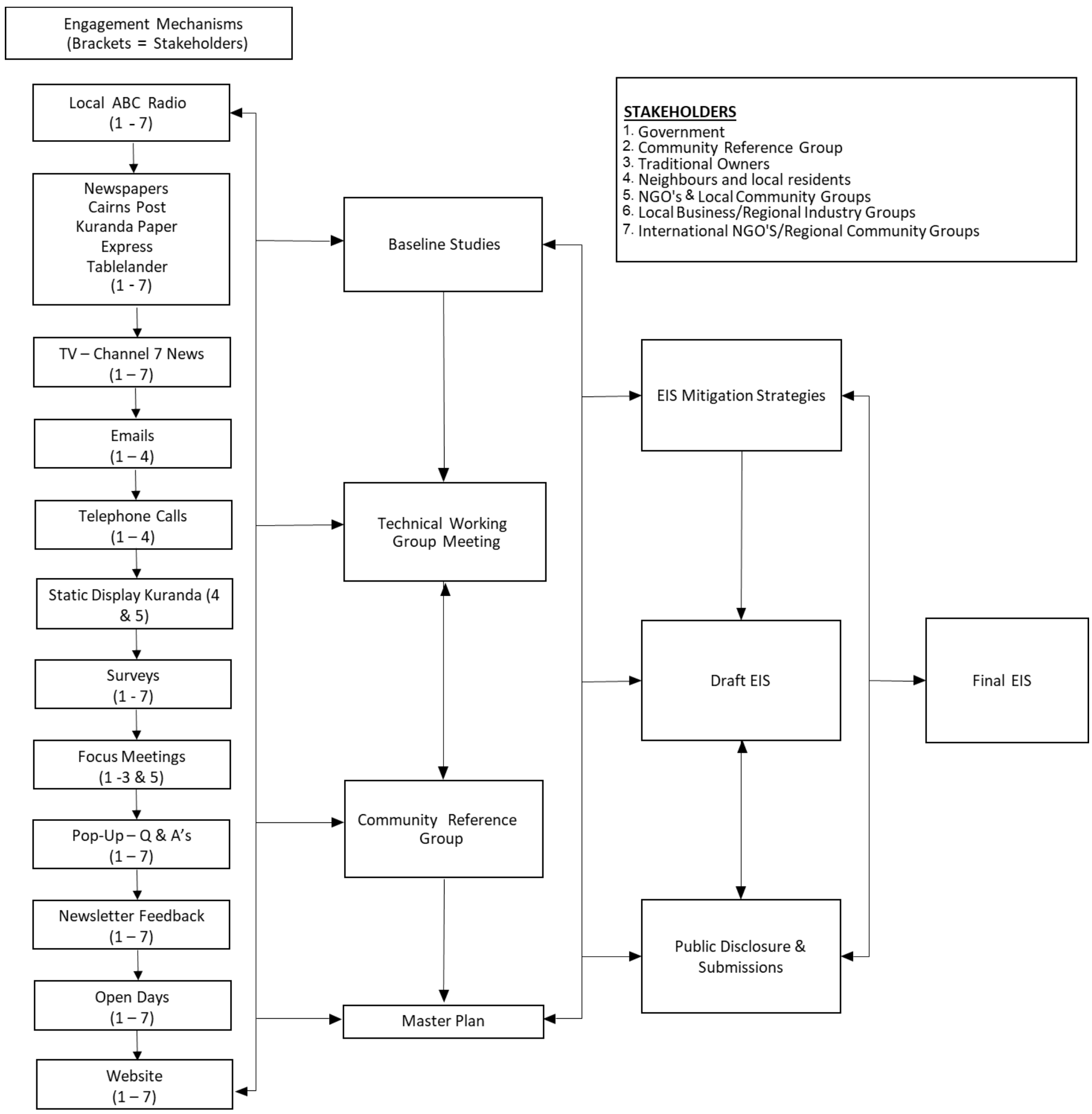

Figure 11-15: Stakeholder, communication channels and their interactions.

The first public meeting attended by KUR-World representatives was held in October 2016. During this event, organised by the community, members of the project team addressed the attendees and provided overall information about KUR-World and the EIS process. At that time, only preliminary information about the potential impacts and benefits of the project was available. However, all concerns, questions and potential impacts raised by the community were recorded. These issues were collated in the survey and Q&A forms. As results from the baseline studies were available, fact-sheets, newsletters and presentations in Open Days and at the community reference group meetings have addressed the recorded concerns and issues. The information from the different studies has also been rolled out through a variety of engagement mechanisms (e.g. newsletters, webpage).

The Community Reference Group (CRG) has played an important role in communicating community concerns and regional benefits. Members of the CRG represent key stakeholders for the project, including immediate neighbours (from residential areas north, south, east and west of the project area), traditional owners, businesses, environmental groups, planning and resource management organisations, social services and legal matters. This forum has served to clarify information regarding the project and has offered opportunities for project team members to present findings and address additional concerns during the studies and preparation of the EIS. CRG members have also provided valuable information concerning potential contacts and opportunities for training, job readiness and capacity building for locals.

11.3.3.3 Results of community consultation and engagement

The results of the engagement activities that were conducted since the release of the final Terms of Reference from October 2016 to December 2017 are summarised in
Table 11-41 below.

Additional private information such as the stakeholder database, records of conversations and minutes of formal meetings are held in the project files. Publicly available information such as CRG Meetings, newsletters and newspaper articles are posted on the KUR-World website www.kur-world.com in the news area and issued as e-blasts to all subscribers.

Table 11-41: Results of community consultation and engagement during EIS process

Stakeholder Engagement Mechanisms	Number of events/ responses	Number of participants	Number of invites	Key issues recorded/addressed during stakeholder engagement
CRG Meetings (December 2016 – October 2017)	6	refer footnote[11]	22	Water Quality Kuranda Tree Frog Traffic Stakeholder Engagement Helicopter traffic & noise Planning Scheme EIS/DA Process Sewerage Treatment Plant Lighting Joint Management Local Employment Scale of project Tenure Management of activities Refer to Appendix 11 for full minutes
Site Open Days (February 2017 and June 2017)	2	74 (February) 66 (June)	117 [12](February) 281[13] (June)	Frog habitat Water Quality Water Resources Transport Scale of project
Neighbours Open Day (February 2017) – cancelled due to severe wet weather	0	0	35	-

[11]Refer to agenda and minutes in Appendix 11

[12]The invite was published in the Kuranda Newspaper that prints between 4,440 and 4,900 newspapers monthly and on the KUR-World webpage.

[13] Out of the 281 invites, 80 were posted directly to neighbours and close residents. The invite was also published in the Kuranda Newspaper that prints between 4,440 and 4,900 newspapers monthly, on the KUR-World webpage and 2409 invites were posted to Cairns (CBD), Smithfield and Kuranda PO Boxes.

Stakeholder Engagement Mechanisms	Number of events/ responses	Number of participants	Number of invites	Key issues recorded/addressed during stakeholder engagement
Indigenous Open Day (September 2017)	1	28	Event was advertised to the local communities.	Employment/Training Business Opportunities Cultural Heritage Protection
Pop-up Stall Kuranda (fortnightly - March to December 2017)	21	142	Advertised in the Kuranda Newspaper and the project's webpage.	Project Design/Layout & Scale Water Resources Transport Employment Environmental Access to project
Surveys • Kuranda • Mareeba • Cairns	62 (Kuranda) 12 (Mareeba) 27 (Cairns)	62 (Kuranda) 12 (Mareeba) 27 (Cairns)	6406 (Kuranda, Koah, Speewah and Mareeba) 2,010 (Cairns) [14]	Refer to Figure 11-16 to Figure 11-22 for data from survey
Newsletters on www.kur-world.com and regional newspapers (Cairns, Kuranda, Mareeba, Atherton)	23	368 subscribers to webpage and between 4,440 and 4,900 Kuranda newspapers printed monthly.	368 subscribers to webpage and between 4,440 and 4,900 Kuranda newspapers printed monthly.	Progress/Updates Refer to Figure 11-23
Fact Sheets – website and regional newspapers (Cairns, Kuranda, Mareeba, Atherton[15])	5	368 subscribers to webpage and the Cairns Post, The Kuranda Newspaper, the Mareeba Express and The Tablelander's readers.	368 subscribers to webpage and the Cairns Post, The Kuranda Newspaper, the Mareeba Express and The Tablelander's readers.	Environmental Values Socio-Economic Infrastructure Traffic Approval Process.
Website - enquiries	81	368	368 subscribers to webpage. Anyone visiting the site is able to submit comments/feedback.	92% comments/feedback in favour 8% against Website feedback was further analysed into positive and negative responses to economic, environmental and social matters. Refer to Figure 11-24 and Appendix 9 for further details.

[14] Number of surveys posted. Survey also available on the project webpage, at the Neighborhood Centre in Kuranda, Kuranda FoodWorks and at the Mareeba Heritage Centre.

[15] The Cairns Post prints 26,000 copies on the weekend edition, the Kuranda Newspaper prints between 4,440 and 4,900 copies monthly, the Tablelander reaches about 39,000 people in the Atherton Tablelands and The Mareeba Express prints 11,500 copies every Wednesday.

Stakeholder Engagement Mechanisms	Number of events/ responses	Number of participants	Number of invites	Key issues recorded/addressed during stakeholder engagement
Website – business register	62	368	368 subscribers to webpage. Anyone visiting the site can register their business.	Details stored in business register database.

*Refer to agenda and minutes in Appendix 11

Evaluation of the results was based on the International Association of Public Participation evaluation questions, as outlined in Table 11-42.

Table 11-42: Evaluation questions

Evaluation questions	Success indicators
Did the information provided articulate the key messages of the project?	Stakeholders and community's understanding and awareness of the project » Nature of questions at CIFS » Nature of questions received through Winslow or the online registration forum. **Corrective Action (if required):** » Additional Community Information Sessions » Updated project website » More frequent / adapted newsletters.
Did the information provided meet the objectives of the Stakeholder Engagement Plan?	Information was provided in accordance with timing of project milestones **Corrective Action (if required):** » Improve timeliness of notification / newsletters.
	Community members indicated they received information from the different sources **Corrective Action (if required):** » Improve timeliness of notification / newsletters. » Improve extent of distribution
	Stakeholders and community members' satisfaction with the information they received **Corrective Action (if required):** » Improve timeliness of notification / newsletters. » Improve frequency of newsletters and project website updates. » Adjust level of detail in newsletters and on the project website
	The number of information materials distributed **Corrective Action (if required):** » Improve timeliness of notification / newsletters.

Evaluation questions	Success indicators
	» Improve frequency of newsletters and project website updates. » Adjust the distribution level / number of newsletters distributed.
Did the information reach its target audience?	Community members indicated they received information from the different sources **Corrective Action (if required):** » Improve timeliness of notification / newsletters. » Improve frequency of newsletters and project website updates. » Adjust the distribution level / number of newsletters distributed.
What were the outcomes of the information provided in terms of increasing the target audiences' awareness and knowledge of the project?	Participants reporting on how well the different types of information they accessed increased their knowledge of the project **Corrective Action (if required):** » Adjust level of detail in newsletters and on the project website » Adjust the distribution level / number of newsletters distributed.
What were the most successful aspects of the information provided and how can these be expanded on in future activities? What were the problems and how can these be rectified in future activities?	Experience and opinions of participants
Did the consultation activities meet the objectives of the Communications and Engagement Plan?	The number of people that participated in consultation activities
	The usefulness of feedback received
	The nature of feedback received
	Corrective Action (if required): » Improve frequency of newsletters and project website updates. » Improve frequency and number of community information sessions » Explore alternative consultation tools » Adjust level of detail in newsletters and on the project website
Did the consultation provide information that was useful to the project team?	The usefulness of feedback received **Corrective Action (if required):** » Adjust level of detail and information provide » Improve frequency and number of community information sessions » Explore alternative consultation tools, use of surveys and other methodologies. » Adjust level of detail in newsletters and on the project website

Evaluation questions	Success indicators
What were the most successful aspects of the consultation process and how can these be expanded on in future activities? What were the problems and how can these be rectified in future activities?	Experience and opinions of participants **Corrective Action (if required):** » Take on board community / stakeholder suggestions on future consultation activities.
Did the involvement process meet the objectives of the Communications and Engagement Plan?	The number of people that participated in the involvement process
	The quality of feedback received
	Corrective Action (if required): » Improve frequency of newsletters and project website updates. » Improve frequency and number of community information sessions » Explore alternative consultation tools » Adjust level of detail in newsletters and on the project website » Take on board community / stakeholder suggestions on future consultation activities.
Did the involvement process provide information that was useful to the project team in creating a shared vision for the community?	Agreement between the project team, stakeholders and community on the shared vision for the community
	A sense of ownership of the shared vision
	Corrective Action (if required): » Explore alternative consultation tools » Adjust level of detail in newsletters and on the project website » Take on board community / stakeholder suggestions on future consultation activities.
What were the outcomes of the involvement process in terms of building relationships between the project team, stakeholders and the community?	Positive attitudes towards the development
	Interest in participating in further engagement or community development activities
	Corrective Action (if required): » Improve frequency of newsletters and project website updates. » Improve frequency and number of community information sessions » Explore alternative consultation tools » Adjust level of detail in newsletters and on the project website » Take on board community / stakeholder suggestions on future consultation activities.

The following figures (Figure 11-16 to Figure 11-22) represent the results of the survey conducted to collect information on the key concerns of the project. The areas of concern were separated into environmental, social and infrastructure to align with the key technical areas of the EIS. While the number of respondents was low (101) compared to the number of surveys that were made available and distributed (8,327), most of the surveys received were from Kuranda (62.6% - 63 individuals) compared to Mareeba (12.1% - 12 individuals) and others (27.3% - 27 individuals). The results summarise the concerns about the proposed project. The greatest concerns across all respondents for all technical areas represented in Figure 11-16 are:

- Protection of endangered species
- Pesticides and fertilisers from golf course reaching the reef
- Jobs offered to locals
- Sediment and erosion measures
- Water supply

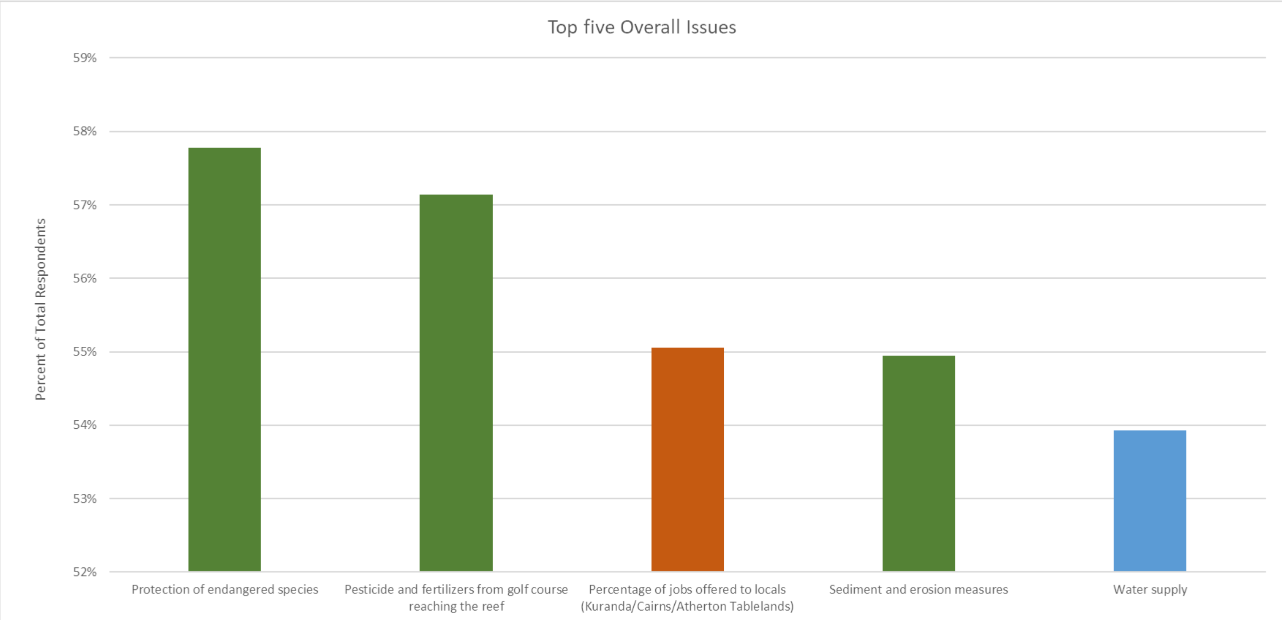

Figure 11-16: Ranking of highest concerns from survey. Different colours represent different categories, green: environment, orange: social and blue: infrastructure. These colour codes are used in the following graphs.

The environmental concerns that are most important to people from all areas (Figure 11-17), are pesticides and fertilizers reaching the reef and protection of endangered species. This result highlights the importance of appropriate environmental management of the KUR-World site both during construction and operations.

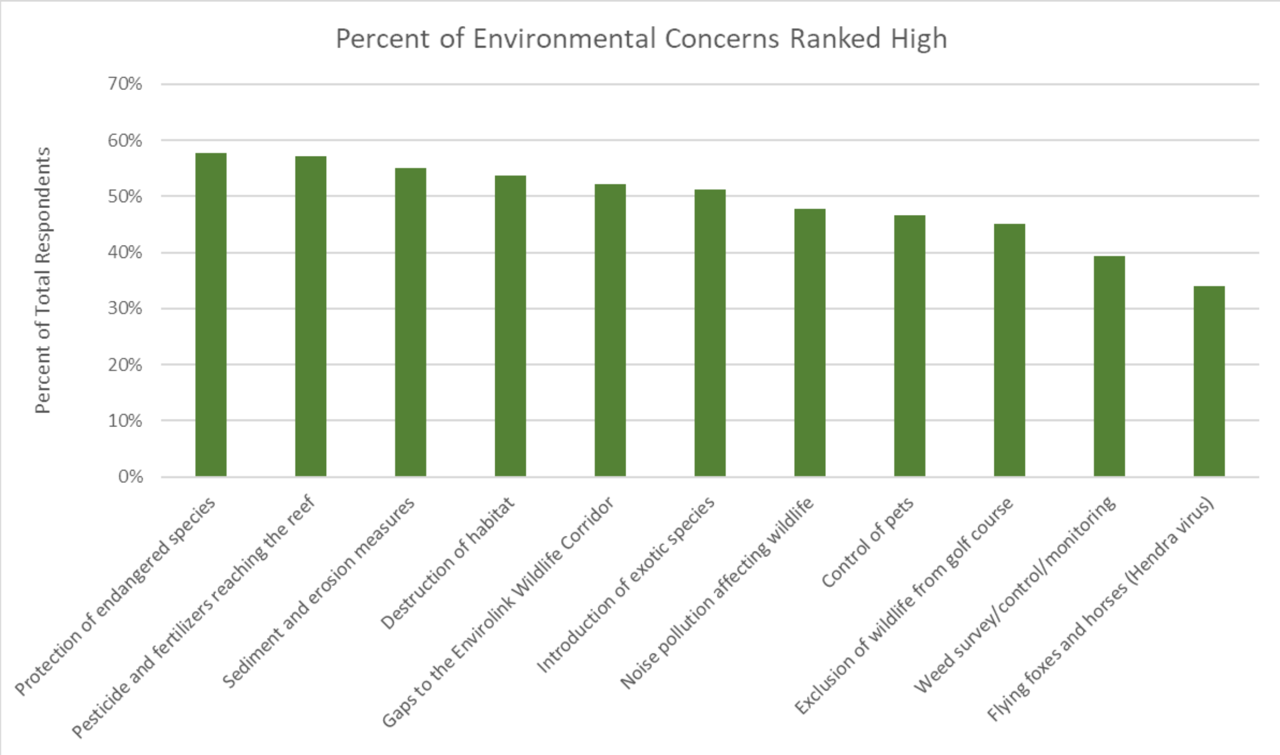

Figure 11-17: Ranking of Environmental concerns from survey

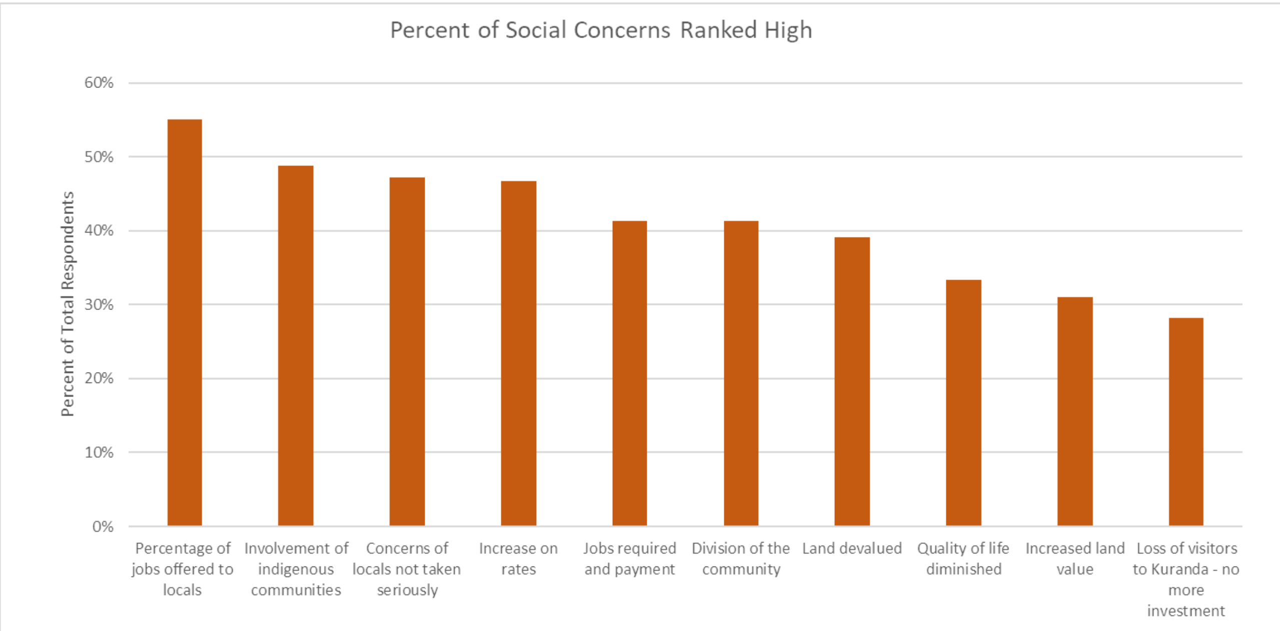

Figure 11-18: Ranking of Social concerns from survey

Key social concerns for stakeholders shown in Figure 11-8 above include the availability of jobs offered to locals and the involvement of Indigenous communities. This reflects the current status of high unemployment within the region, particularly for young Indigenous people. The most important infrastructure issues are water supply and waste management as outlined in Figure 11-19 below.

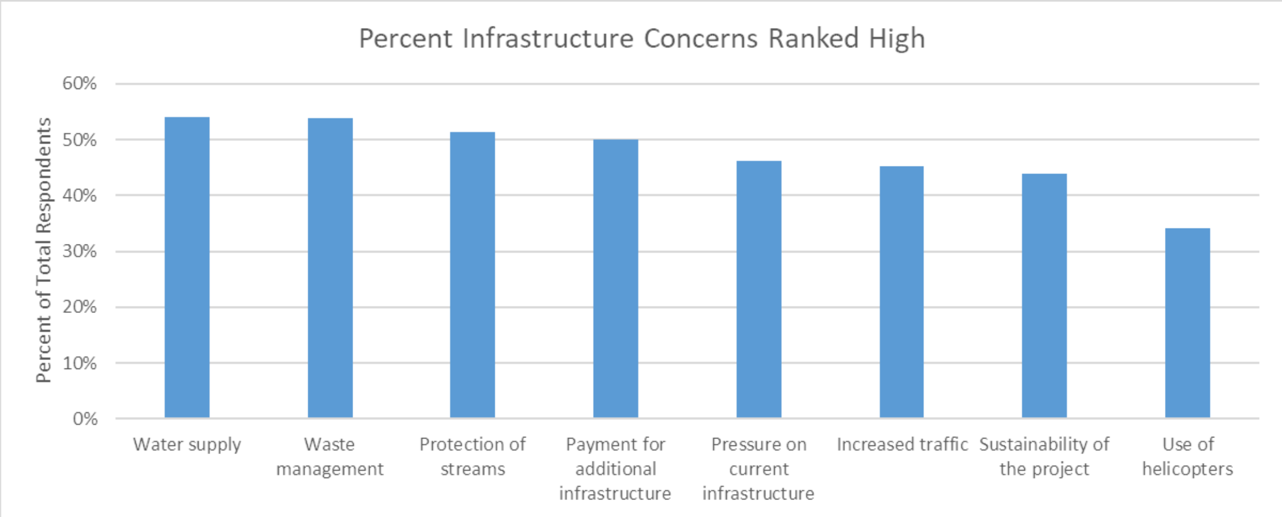

Figure 11-19: Ranking of Infrastructure concerns from survey

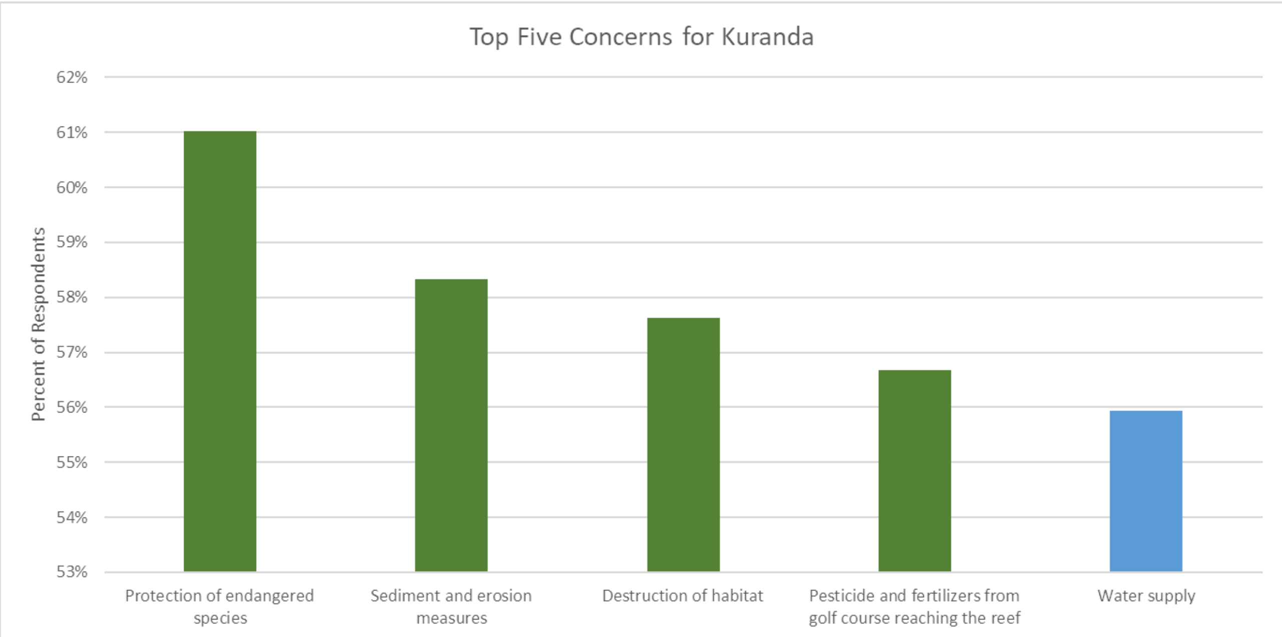

Figure 11-20: Top five concerns for Kuranda from survey

The top five concerns for respondents from Kuranda relate to environmental issues with the exception of water supply, as represented in Figure 11-20. These concerns reflect the Kuranda community values of environmental awareness and appreciation, as well as the reliance on groundwater of some residents in the non-urban residential areas of Kuranda.

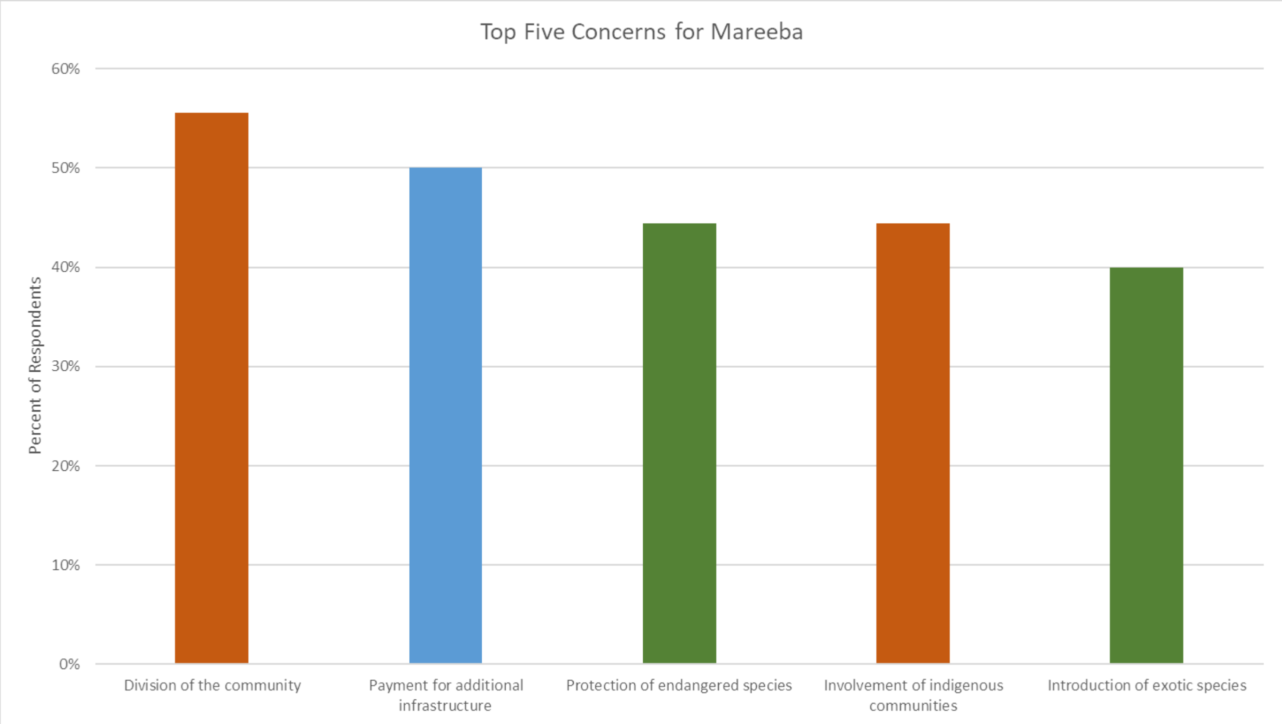

Figure 11-21: Top five concerns for Mareeba from survey

Respondents in Mareeba are concerned about a range of social, infrastructure and environmental issues, as represented in Figure 11-21. Division within the community and the involvement of Indigenous communities are the most important social issues. Payment for additional infrastructure is a concern in Mareeba, this might be a result of the recent forced amalgamation and then voluntary de-amalgamation of the Mareeba Shire which has placed a burden on rate payers. The environmental issues of concern are the protection of endangered species which is similar to Kuranda. However, the other environmental issue of concern is the introduction of exotic species, this may reflect the biosecurity concerns of the farming community around Mareeba.

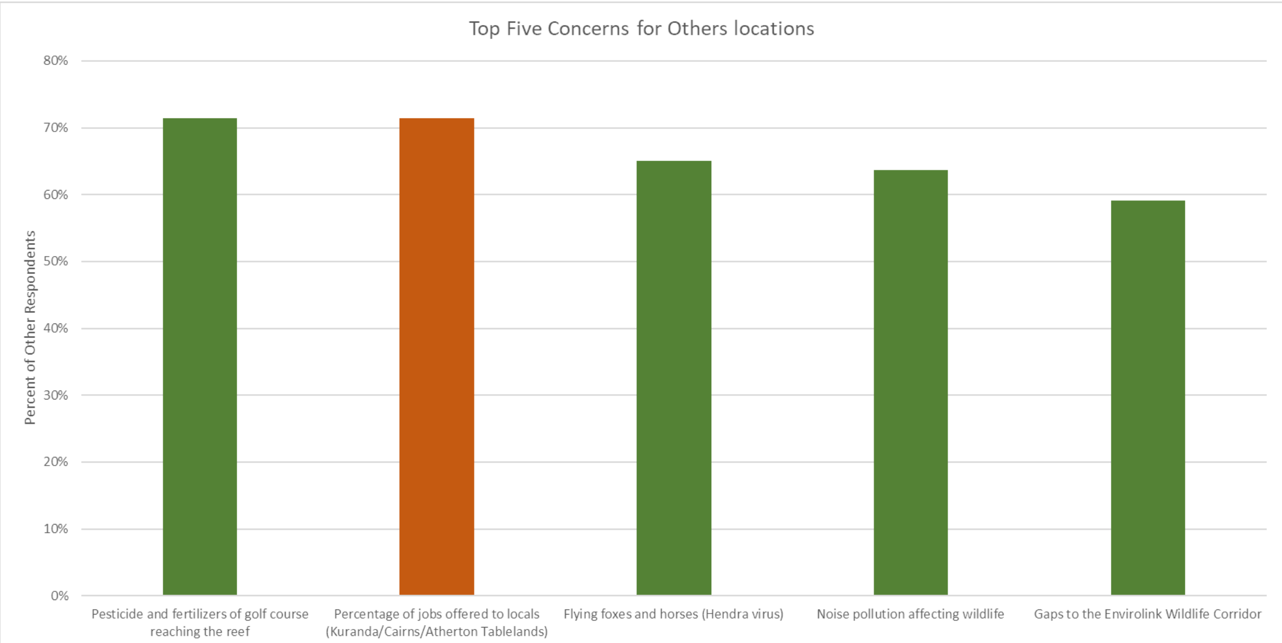

Figure 11-22: Top five concerns for others (not from Kuranda or Mareeba) from survey

Other respondents were mostly from Cairns and their concerns reflect this coastal location as shown in Figure 11-22. In particular, concerns regarding impacts on the Great Barrier Reef and the impacts on flying foxes which has been a current issue in Cairns over the past few years. Local employment is also a concern, this may reflect the high youth unemployment and the downturn in the construction industry in recent years.

Figure 11-23: Number and trend in registrations on www.kur-world.com

The KUR-World website www.kur-world.com had 368 subscribers by the end of 2017 (Figure 11-23) who registered to receive updates issued during the EIS process. Of these subscribers, 81 submitted comments or questions, of which 92% were positive and/or supportive of the project, the remaining 8% comments received were not supportive of the project. The full list of comments with all identities removed is listed in Appendix 9. An analysis of the website responses was undertaken to identify a negative, neutral or positive in respect to economic, environmental or social (refer Figure 11-24). The majority of respondents to the website were positive and included requests for employment and business opportunities associated with KUR-World, and identified a need to manage the employment opportunities created by the project. Notwithstanding, social and environmental concerns which were also registered on the website, and albeit to a lesser extent identify that environmental and social concerns must be addressed by the project. A further 62 submissions were made to the business register, reinforcing that the community's economic interests in the project must be addressed in a coordinated / managed way through to at minimum 2027/2028 when KUR-World is anticipated to be fully operational.

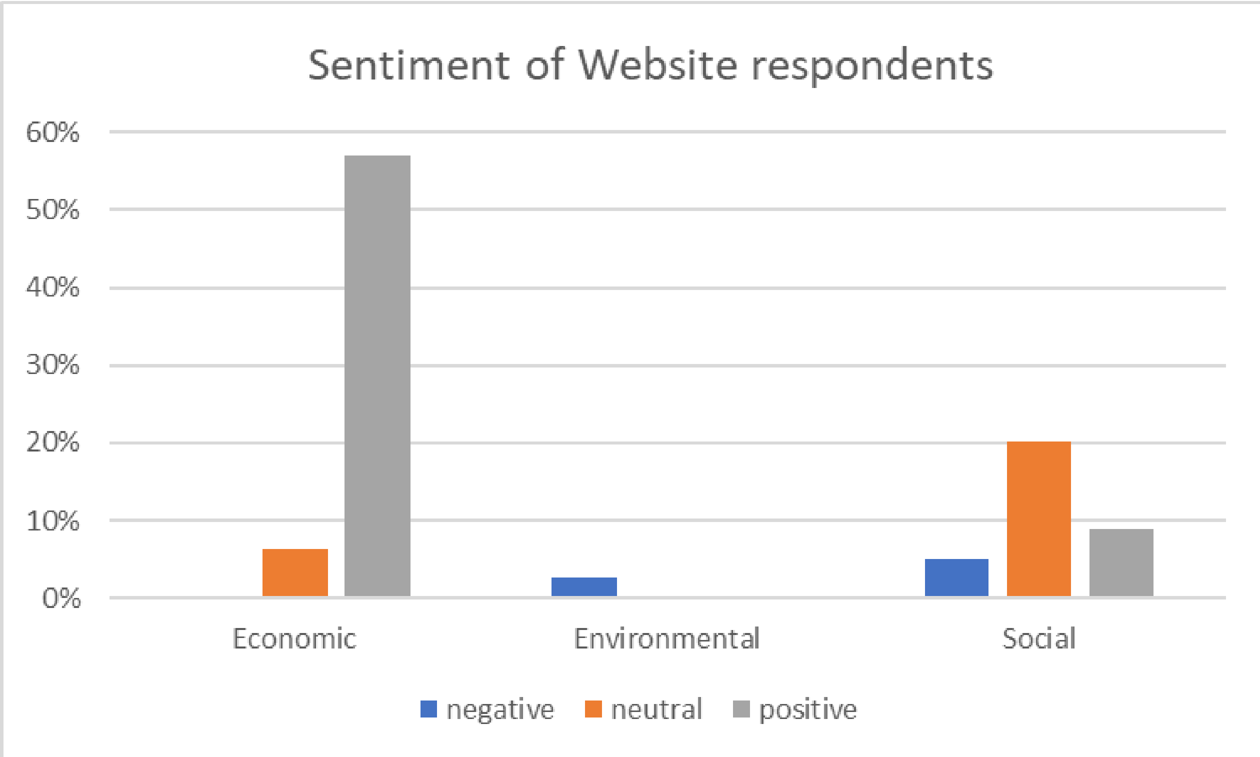

Figure 11-24: Sentiment of website respondents

11.3.4 Community engagement for public notification

The public notification period will be as determined by the Coordinator General, and subject to a minimum period of 28 days (i.e. 4 weeks). During the public notification period the following stakeholder engagement mechanisms will be implemented. The frequency of the engagement and the corresponding stakeholder group is detailed in Table 11-43.

Table 11-43: Stakeholder engagement mechanisms during public notification

Stakeholder Group	Frequency* and mechanism					
	Formal meetings	Information Days	Pop-up Stalls in various locations	Focus Group Discussions	Newsletters and Newspapers	Website/ Q&A
Project proponents, employees and contractors	C	B	A	C	B	C
Mareeba Shire Council	C	B	-	C	B	C
The Coordinator-General	C	-	-	C	B	C
EPBC	C	-	-	C	-	C
Aboriginal Parties	C	B	A	C	B	C
Immediate Neighbours	C	B	A	C	B	C

Local Community Groups	C	B	A	C	B	C
Local Business and Regional Industry Groups	C	B	A	C	B	C
Community Reference Group (CRG)	B	B	-	C	B	C

**Frequency: A) weekly B) twice during the public notification period; C) as required.*

- Formal meetings will be held as required with Mareeba Shire Council, The Coordinator-General, Commonwealth EPBC, Aboriginal Parties, Neighbours, Local Community Groups, Local Business and Industry Groups and the Community Reference Group. Formal meetings will address issues raised by key stakeholders during the EIS process as listed above in Table 11-41.
- Information Sessions will be held at public locations and will coincide with community events when possible. The technical specialists will be available to answer questions and receive feedback from the public.
- Focus group discussions will be held with stakeholder interest groups, such as for example community service providers to determine the community service impacts / needs that can be predicted to coincide with the staged development of KUR-World
- Pop-up Stalls will be set up in Cairns, Kuranda, Mareeba and Atherton. These will be held in different locations to coincide with community events where possible.
- Information on how to access the draft EIS, how to provide comments and where to attend pop-up stalls and information sessions will be provided via the KUR-World website and in local Cairns and Tablelands newspapers.
- The website will continue to be available to receive submissions as well as input survey responses. The Question & Answers format will be updated with information from the completed EIS studies and the approvals process.

11.3.5 Community engagement up to Final EIS

Following the Public Disclosure Phase submissions will be received and incorporated into the final EIS. During this time the following stakeholder engagement mechanisms will be implemented. The frequency of the engagement and the corresponding stakeholder group is detailed in Table11-44.

Table11-44: Stakeholder engagement mechanisms up to Final EIS

Stakeholder Group	Frequency* and mechanism				
	Formal meetings	Information Days	Focus Group Discussions	Newsletters and Newspapers	Website/ Q&A
Project proponents, employees and contractors	C	C	C	C	C
Mareeba Shire Council	C	C	C	C	C
The Coordinator-General	C	-	C	C	C

EPBC	C	-		C	-	C
Aboriginal Parties	C	C	C		C	C
Immediate Neighbours	C	C	C		C	C
Local Community Groups	C	C	C		C	C
Local Business and Regional Industry Groups	C	C	C		C	C
Community Reference Group (CRG)	C	C	C		C	C

**Frequency: A) monthly B) quarterly following public disclosure period; C) as required.*

- Formal meetings will be held as required with Mareeba Shire Council, The Coordinator-General, Commonwealth EPBC, Aboriginal Parties, Neighbours, Local Community Groups, Local Business and Industry Groups and the Community Reference Group.
- Information Days will be held at public locations. The technical specialists will be available to answer questions and receive feedback from the public.
- The website will continue to be available to receive submissions as well as input survey responses. The Question & Answers format will be updated with information from the completed EIS studies and the approvals process.

11.3.6 Community engagement post decision

A program of engagement has been proposed for the Post-decision phase as outlined in Table 11-45.

Table 11-45: Stakeholder engagement mechanisms post-decision.

Stakeholder Group	Frequency* and mechanism					
	Formal meetings	Open Day	Grievance Mechanism	Focus Group Discussions	Newsletters and Newspapers	Website Updates
Project proponents, employees and contractors	B	A	B	B	B	B
Mareeba Shire Council	B	A	-	B	B	B
The Coordinator-General	B	-	-	B	B	B
EPBC	B	-	-	B	B	B
Aboriginal Parties	B	A	B	B	B	B
Immediate Neighbours	B	A	B	B	B	B
Local Community Groups	B	A	B	B	B	B
Local Business and Regional Industry Groups	B	A	B	B	B	B

*Frequency: A) annual; B) as required.

- Other Formal meetings will occur as required with government, indigenous, community and industry representatives.
- An Open Day will be held as required for local community groups, indigenous parties and neighbours to attend.
- A Grievance Mechanism will be established (refer to Appendix 9).
- A quarterly newsletter will be produced and issued via the website as well as placed in the local Kuranda newspaper.
- The website will be updated as required and submissions answered as appropriate.

11.4 Social and economic impact assessment

11.4.1 Summary of socio-economic impacts

11.4.1.1 Background

The KUR-World project has the following characteristics:

- 33 revenue generating elements spread over 15 attractions/recreation activities, 10 accommodation elements, 5 central/support facilities and 3 lots of property sales.
- Spread over four stages, scheduled to commence operations as follows:
  Stage 1A ....Oct 2018
  Stage1B ....Jan 2021
  Stage2 ....Feb 2024
  Stage3 ....Oct 2027
- Economic impacts are analysed for the:
  - immediate Kuranda area west to the Clohesy River, Kuranda SA2
  - Mareeba/Tablelands LGAs
  - Cairns region SA4
  - Queensland and National economies.
- The analysis has been undertaken over a nine-year period from 2018-19 through to full establishment and operation in 2027-28.
- Further information on potential impacts of social relevance is addressed in Chapter 17 and Appendices 8b, 8c and 16.

11.4.1.2 Construction phase

- Construction costs totalling $855.3 million are broken into two streams:
  - the main resort construction totalling $536.4 million
  - Construction through property sales totalling $318.9 million
  - Excluding up to about $65 million to be construction undertaken by individuals who have purchased land at the resort, project cost is estimated at over $790 million.
- Construction cost is estimated to average about $95 million a year over nine years, with a peak in 2020-21 at $160 million.
- Direct construction employment is also expected to peak at about 348 in 2020-21. With Type 1 ‘flow-on’ effects in the regional economy, total construction employment is expected to peak at about 713.

11.4.1.3 Property sales

- Property sales are planned over the first three years to 2020-21 and to recommence in Years 2023-24 and 2026-27. There will be a small impact of associated activity generated by sales activity, visits by potential buyers and post-sale legal estimated to be of the order of $14 million and to create about 30 direct jobs at peak.

11.4.1.4 Resort operation

- Revenue from resort operation is expected to build up over the 10-year period from a starting-point of $17 million a year to $306 million a year in 2027-28, when the resort will be fully operational.
- Day visitor numbers are projected to build up from 103,000 in 2018-19 to about 500,000 in 2027-28; an average of about 1,400 a day.
- Overnight guests are projected to build up from about 1200 in 2018-19 to 240,000 in 2027-28; staying an average of three nights, so generating about 720,000 visitor nights. The total for on-the-ground visitors each day is estimated at 2,000 in 2027-28.
- Direct employment generated at the resort is estimated to reach about 1,450 (or 970 FTE) by 2027-28 and with 'flow-on' effects generated by expenditure at KUR-World producing an additional 410 jobs in the Cairns SA4 Region, resulting in a total of about 1860 jobs in the Cairns SA4 Region Apart from expenditure at the resort, day visitors and overnight guests are estimated to generate expenditure in the economy away from the resort of an estimated $230 million in 2027-28, with the majority being on outside tours by overnight stay visitors of about $170 million.
- Estimated direct employment generated by this expenditure is expected to be approximately 1,313 in 2027-28 and with flow-on effects to rise to about 1,682.

11.4.1.5 Ability to absorb the project

- Analysis of trends in tourism in Far North Queensland results in forward projection of visitation to the region to 2028, as follows:
  - Chinese visitors growing at 15% per annum to 2021-22 and 5% per annum thereafter to about 710,000 in 2027-28.
  - Other international visitors growing at 2.0% per annum from 181,000 to 852,000 by 2027-28
  - Domestic visitors continuing to grow at long-term trend of 2.5% per annum by 654,000 to 2,550,000 by 2027-28.

  Total regional visitation is therefore expected to grow from 2.8 million to 4.1 million by 2027-28 (i.e. by about 1.3 million or an average of 3.2% per annum).

- By comparison, visitor nights at KUR-World of 720,000 in 2027-28 compare with estimated additional regional visitor nights of about 8 million; indicating significant market capacity for the project.
- Day trip numbers of 500,000 (when fully operational) compare with estimated additional 8 million regional visitor days by 2027-28; also indicating significant market capacity for the project.
- The rate of development of the project can be managed to suit both prevailing market and resource conditions, should these vary from those currently anticipated.
- It is envisaged that up to 30% of Villas and Queenslanders sold to individuals, i.e. up to about 110, will be used for residential purposes, i.e. at an average rate of increase of about 12 a year and be of a type and location that would not affect the Kuranda housing market.
- To address the potential of the anticipated population change on the community, focus groups will be established to directly engage with health and medical, emergency, child care and education service providers.

11.4.1.6 Economic impact in 2027-2028

- The full economic impacts of KUR-World when fully established in 2027-28, are estimated as follows:
  Direct expenditure $472.9M
  Addition to GRP (Cairns SA4 region) including Type 1 flow-on effects $345.3M

Initial employment generated (Full-Time and Part-Time) ....2,763 jobs
Total employment generated including Type 1 flow-on effects (Full-Time and Part-Time).....3,542 jobs

- It is estimated that when fully operational, the project will add about 2.0% per annum to Gross Regional Product in the Cairns region (with flow-on effects).
- Estimated employment impact (including flow-on) is expected to add about 2.7% to the Cairns region employed workforce in 2027-28.

11.4.1.7 Location of employment

- It is estimated that when fully operational the resort will directly generate about 970 full time equivalent jobs but with a substantial part time employment requirement, total workforce needed is estimated at about 1,450 (including Full-Time and Part-Time jobs).
- Analysis of past employment patterns in Kuranda and the Tablelands indicates that of the workforce living in Kuranda, almost 60% work outside Kuranda, especially in Cairns.
- Of those working in Kuranda, about 31% travel into Kuranda from outside (21% from Cairns).
- It is estimated that:
  - About 24% of the workforce will be drawn from Cairns (construction phase 26% and operational phase 23%)
  - There will be a significant opportunity to provide local employment for Kuranda residents currently traveling away from Kuranda for employment (operational phase 15%)
  - With appropriate training there will be a significant opportunity to reduce the high level of unemployment in the area, especially amongst the Indigenous population and to provide substantial part-time jobs
  - There will be a substantial ability to draw workforce from other Tablelands centres
  - During the construction phase, there could be a need to provide local temporary accommodation at the peak for up to about 50 workers
  - With appropriate mitigation measures, the need to locate additional workforce and population in Kuranda will be moderate (24% of the workforce when fully operational).

11.4.1.8 Impacts on Kuranda

- Kuranda’s population is currently about 4,700 and on long-term trends (not including KUR-World) this could be expected to be about 5,500 by 2027-28.
- Apart from direct impacts of the resort, there will be secondary impacts from expenditure by day trippers and overnight stayers amongst Kuranda shops and tourism facilities. There will also be an impact of construction to accommodate additional local workforce and population, as well as expenditure by additional permanent residents and temporary residents during construction. Expenditure is estimated to be run at about $36 million a year by 2027-28, generating a further 150 jobs, most of which are likely to be filled by Kuranda residents.
- Additional local employment by 2027-28 (including at the resort and due to secondary impacts), is estimated at about 500, generating a population of about 1,000 and requiring 354 additional dwellings.
- Addition to population generated directly by the project and secondary impacts on Kuranda are estimated to be about 1,000 by 2027-28, adding 21% to the current existing population in the Kuranda area (i.e. the equivalent of an annual growth rate of 2% per annum).
- The additional requirement of about 350 dwellings by 2027-28 equates to an average of about 35 a year over the project lead-in period; as compared with an average of about 30 dwelling approvals per year over the past five years.
- Although dwelling allotments currently available in the area approximately equate to additional dwelling needs by 2027-28, to meet normal underlying growth of Kuranda and maintain a buffer to

ensure the market does not overheat, there will be a need for further dwelling allotment subdivisions in the Kuranda area by 2023-24.

11.4.1.9 Regional accommodation

- The accommodation sector in the Tropical North Queensland region in 2015-16 comprised of 3,980 rooms in hotels and resorts and 3,933 serviced apartments; a combined total of 7,913.
- Based on projected growth of tourism in the region, it is estimated an additional 3,800 rooms in hotels and serviced apartments will be required by 2027-28.
- The project is estimated to supply 1,400 rooms in hotel, resort, serviced apartments and villas by 2027-28; well below projected regional requirements.

11.4.1.10 Kuranda tourism

- The project is expected to increase day visitor numbers to Kuranda from a current level of about 1 million a year to about 1.48 million a year by 2027-28.

11.4.1.11 Tablelands tourism

- The KUR-World project is predicated on establishing iconic accommodation on the Tablelands and can be expected to dramatically lift day visitation to Tablelands attractions; stimulating the development of both existing and new tourism initiatives and support businesses.

11.4.1.12 Reef tourism

- It is anticipated that most overnight resort guests will undertake a reef trip, adding in the order of 15% to annual expected reef visitation.

11.4.1.13 Airport and air services

- KUR-World's overnight accommodation is expected to generate about 460,000 additional passenger movements by 2027-28; about a 9% increase on current passenger movements. The level of passenger movements would represent about 15 inward and 15 outward flights a week; especially flights from Chinese mainland cities.

11.4.1.14 Business and supply chain opportunities

- Surveying among local businesses in the region has indicated substantial opportunities for Tablelands businesses to supply KUR-World during the construction phase - across a range of materials, including concrete, timber and light steel fabrication; as well as opportunities for establishment of plant for fabrication of building trusses.
- The operational phase of KUR-World will also provide major opportunities for Tablelands businesses to supply fresh produce, fruit and meat products. The project will also increase business opportunities for existing Kuranda tourism operations, as well as supplies of goods and services.

11.4.1.15 Potential for direct investment

- The project will offer opportunities for local direct property investment in villas, 4-star and serviced apartments, with a total value of over $200 million.

11.4.1.16 Wider benefits for the Queensland and Australian economies

Queensland State level:

- The project will strengthen the Cairns regional economy, with flow-on impacts through coastal regional economies to Brisbane and the south-east corner of the State.
- When fully operational, KUR-World can be expected to add in the order of $400 million a year to Gross State Product and add in the order of 4,000 jobs to the Queensland economy.

- Including flow-on effects, the project is expected to generate in the order of $60 -70 million a year in Queensland tax revenues.
- The project will help consolidate Queensland's position in international holiday tourism and especially help Queensland become the leading State in Australia for holiday visitors from China.

National level:

- KUR-World will play a significant role in diversifying Australia's growing economic engagement with China; developing significant people to people contact in the tourism sector, as well as across a wide range of goods and services and helping to foster bilateral social and cultural relations.
- The strongly regional location of KUR-World will help consolidate the role of Far North Queensland in spreading the positive impacts of international tourism beyond major metropolitan centres, with benefits to the Red Centre and Top End tourism, linked by strong air services through the Cairns hub; as well as throughout regional Queensland.

11.4.2 Project construction

11.4.2.1 Background

The KUR-World project is proposed to have 33 operational elements/revenue points that when fully developed fall into four groups:

1) Attractions/Recreation activities 15
2) Accommodation 10
3) Central/supporting facilities...5
4) Property sales...3

Total..33

It is proposed that the project will be delivered in stages over a nine-year period to 2027-2028. The early phases involve bringing attractions and recreation activities on stream with accommodation development progressively being introduced and in the final phase, developing university campus and specialist health facilities *(details can be found in W.S. Cummings's Economic Impact Assessment document – Appendix 8B)*.

The major outcomes for the development for Kuranda, Tablelands and the Tropical North Queensland region are envisaged to be:

- The development of a major signature resort on the Tablelands that will act as a catalyst to stimulating tourism development in the region
- Progressive expansion of the range of accommodation available in the Cairns region, including special elements of health and well-being and university campus accommodation in the Tablelands area
- Expansion of the range of day tripper attractions/opportunities in the Cairns tourism region including recreation activities and a range of new rurally-related features, not currently regionally available
- Provision of a range of new facilities that will be especially attractive to new international growth markets, especially mainland China.

11.4.2.2 Estimated direct project expenditure

Construction expenditure will fall into two categories:

- main resort development
- sale of properties to individual investors.

The following Table 11-46 sets out estimated direct expenditure on the main resort by phases and years.

Table 11-46: Estimated main resort construction expenditure

	Total $M	2018-19 $M	2019-20 $M	2020-21 $M	2021-22 $M	2022-23 $M	2023-24 $M	2024-25 $M	2025-26 $M	2026-27 $M
Stage 1A										
KUR-Cow Tourism - Stage 1	9.75	9.75								
Professional fees	0.45	0.45								
Infrastructure	3.3	3.3								
Sub Total	**13.5**	**13.5**								
Stage 1B										
KUR-Cow Tourism - Stage 2	23.9	23.9								
Equestrian	10.8	10.8								
Village Hub	17		12	5						
Rainforest Education	7.1		5	2.1						
Adventure Pk	20		10	10						
Professional fees	39	10	14.5	14.5						
Infrastructure	98.5	25.5	36.5	36.5						
Sub Total	**216.3**	**70.2**	**78**	**68.1**						
Stage 2										
Convention Centre & Sporting Fields	19.3			7.3	9.6	2.4				
Golf Clubhouse & Course	17.6			6.6	8.8	2.2				
Professional fees	22.4			8.4	11.2	2.8				
Infrastructure	45.7			17.2	22.8	5.7				
Sub Total	**105**			**39.5**	**52.4**	**13.1**				
Stage 3										
Campus & Student Accommodation	92.8						34.8	46.4	11.6	
5-Star Eco Resort	79						29.6	39.5	9.9	
Health & Well-being	24.3								16.2	8.1
Professional fees	1.2								0.8	0.4
Infrastructure	4.3								2.8	1.5
Sub Total	**201.6**						**64.4**	**85.9**	**41.3**	**10**
Total	**536.4**	**83.7**	**78**	**107.6**	**52.4**	**13.1**	**64.4**	**85.9**	**41.3**	**10**

On top of this, as properties are sold, construction will take place either through KUR-World selling lots with individual investors building dwellings, or through sale of land and dwelling packages *or* through strata title sales. Table 11-47 below shows estimates of construction value by years.

Table 11-47: KUR-World estimated construction involved by years financed by property sales

Years	Stage 1A		Stage 1B				Stage 1B		Stage 2		Stage 2		Stage 3		Total $M
	Queenslander Lots		Lifestyle Villas		4-star Resort		Premium Villas		4-star Resort		Premium Villas		Premium Villas		
	No.	Value $M	No.	Value $M	No.	Value $M	No.	Value $M	No.	Value $M	No.	Value $M	No.	Value $M	
2018-19		-	7	4.2	-	-	-	-	-	-	-	-	-	-	**4.2**
2019-20	21	7.9	28	16.8	169	14.8	24	14.6	-	-	-	-	-	-	**54.1**
2020-21	-	-	21	12.6	101	8.9	15	8.8	26	10.3	19	11.6	-	-	**52.1**
2021-22	-	-	-	-	-	-	-	-	79	30.8	58	34.7	-	-	**65.4**
2022-23	-	-	-	-	-	-	-	-	79	30.8	58	34.7	-	-	**65.4**
2023-24	-	-	-	-	-	-	-	-	26	10.3	19	11.6	12	7.0	**28.8**
2024-25	-	-	-	-	-	-	-	-	-	-	-	-	35	20.9	**20.9**
2025-26	-	-	-	-	-	-	-	-	-	-	-	-	35	20.9	**20.9**
2026-27	-	-	-	-	-	-	-	-	-	-	-	-	12	7.0	**7.0**
2027-28	-	-	-	-	-	-	-	-	-	-	-	-	-	-	**0.0**
Total	**21**	**7.9**	**56**	**33.6**	**270**	**23.7**	**39**	**23.4**	**210**	**82.1**	**154**	**92.4**	**94**	**55.8**	**318.9**

11.4.2.3 Estimated flow-on impacts and employment

The following Table 11-48 gives estimated construction expenditure by year.

Table 11-48: KUR-World estimated construction expenditure by years

Years	Main construction ($M)	Following property sales ($M)	Total ($M)
2018-19	$83.7	$4.2	**$87.9**
2019-20	$78.0	$54.1	**$132.1**
2020-21	$107.6	$52.1	**$159.7**
2021-22	$52.4	$65.4	**$117.8**
2022-23	$13.1	$65.4	**$78.5**
2023-24	$64.4	$28.8	**$93.2**
2024-25	$85.9	$20.9	**$106.8**
2025-26	$41.3	$20.9	**$62.2**
2026-27	$10.0	$7.0	**$17.0**
2027-28	$0.0	$0.0	**$0.0**
Total	**$536.4**	**$318.9**	**$855.2**

The following Table 11-49 renders yearly construction expenditure by industry categories as defined in ABS National Account Input/Output Tables.

Table 11-49: KUR-World Construction phase, estimated expenditure by industry categories

Years	Residential building construction	Non-residential building construction	Heavy & civil engineering	Professional scientific & technical services	Total
	$M	$M	$M	$M	$M
2018-19	$4.20	$44.45	$28.80	$10.45	**$87.90**
2019-20	$54.10	$27.00	$36.50	$14.50	**$132.10**
2020-21	$52.10	$31.00	$53.70	$22.90	**$159.70**

Years	Residential building construction	Non-residential building construction	Heavy & civil engineering	Professional scientific & technical services	Total
	$M	$M	$M	$M	$M
2021-22	$65.40	$18.40	$22.80	$11.20	**$117.80**
022-23	$65.40	$4.60	$5.70	$2.80	**$78.50**
2023-24	$93.20	$0.00	$0.00	$0.00	**$93.20**
2024-25	$106.80	$0.00	$0.00	$0.00	**$106.80**
2025-26	$58.60	$0.00	$0.40	$0.80	**$59.80**
2026-27	$15.10	$0.00	$1.50	$2.80	**$19.40**
2027-28	$0.00	$0.00	$0.00	$0.00	**$0.00**
Total	**$514.90**	**$125.45**	**$149.40**	**$65.45**	**$855.20**

As can be seen from Table 11-48, expenditure is estimated to peak in 2020-21 at a total of about $160M and then fall back; with a sub peak in 2024-25 and completion in 2026-27.

The following Table 11-50 applies standard multipliers to industry categories to give estimates of impact on Gross Regional Product (GRP). (For further details refer to *W.S. Cummings's Economic Impact Assessment.*, Appendix 8B.)

Table 11-50: KUR-World construction phase, estimated addition to Gross Regional Product including flow-on type 1, by years

Years	Residential building construction	Non-residential building construction	Heavy & civil engineering	Professional scientific & technical services	Total
	$M	$M	$M	$M	$M
2018-19	$3	$29	$21	$8	**$61**
2019-20	$34	$18	$26	$11	**$89**
2020-21	$33	$20	$39	$17	**$110**
2021-22	$42	$12	$16	$8	**$79**
2022-23	$42	$3	$4	$2	**$51**
2023-24	$59	$0	$0	$0	**$59**
2024-25	$68	$0	$0	$0	**$68**
2025-26	$37	$0	$0	$1	**$38**
2026-27	$10	$0	$1	$2	**$13**
2027-28	$0	$0	$0	$0	**$0**
Total	**$328**	**$83**	**$108**	**$49**	**$568**

The following Table 11-51 gives estimated direct employment created based on regional input/output multipliers. It indicates that the direct construction workforce will peak at about 350 in 2020-21.

Table 11-51: KUR-World construction phase, estimated direct employment

Years	Residential building construction	Non-residential building construction	Heavy & civil engineering	Professional scientific & technical services	Total
	No.	No.	No.	No.	No.
2018-19	14	40	35	39	**128**
2019-20	176	24	44	55	**299**
2020-21	169	28	65	86	**348**

Years	Residential building construction	Non-residential building construction	Heavy & civil engineering	Professional scientific & technical services	Total
	No.	No.	No.	No.	No.
2021-22	213	16	28	42	**299**
2022-23	213	4	7	11	**235**
2023-24	303	0	0	0	**303**
2024-25	347	0	0	0	**347**
2025-26	190	0	0	3	**193**
2026-27	49	0	2	11	**62**
2027-28	0	0	0	0	**0**
Total	**1674**	**112**	**181**	**247**	**2214**

The following Table 11-52 gives estimated total employment including Type 1 flow-on effects.

Table 11-52: KUR-World construction phase, estimated total employment by year, including flow-on type 1 effects

Years	Residential building construction	Non-residential building construction	Heavy & civil engineering	Professional scientific & technical services	Total
	No.	No.	No.	No.	No.
2018-19	24	154	99	57	**334**
2019-20	307	93	126	79	**606**
2020-21	296	107	185	125	**713**
2021-22	371	64	78	61	**575**
2022-23	371	16	20	15	**422**
2023-24	529	0	0	0	**529**
2024-25	607	0	0	0	**607**
2025-26	333	0	1	4	**339**
2026-27	86	0	5	15	**106**
2027-28	0	0	0	0	**0**
Total	**2924**	**434**	**514**	**356**	**4231**

11.4.2.4 Capacity analysis - construction

During the construction phase, the project is moderately large in the regional economy. An analysis was carried out to test whether there would be any undue constraints on normal supply of inputs to the construction sector. An independent report from Thirkell Consulting Engineers (Refer to Appendix 10) was commissioned to explore whether there are likely to be any insurmountable issues.

A major question for the economic impact analysis has been whether the impact is as large in relation to the capacity of the region, that a major revision of the input/output multipliers used in the preceding section would be needed.

Figure 11-25 below gives historical value of building approvals in the Cairns/Far North Queensland Statistical Division, in recorded dollars and adjusted by CPI Brisbane to current 2017 values.

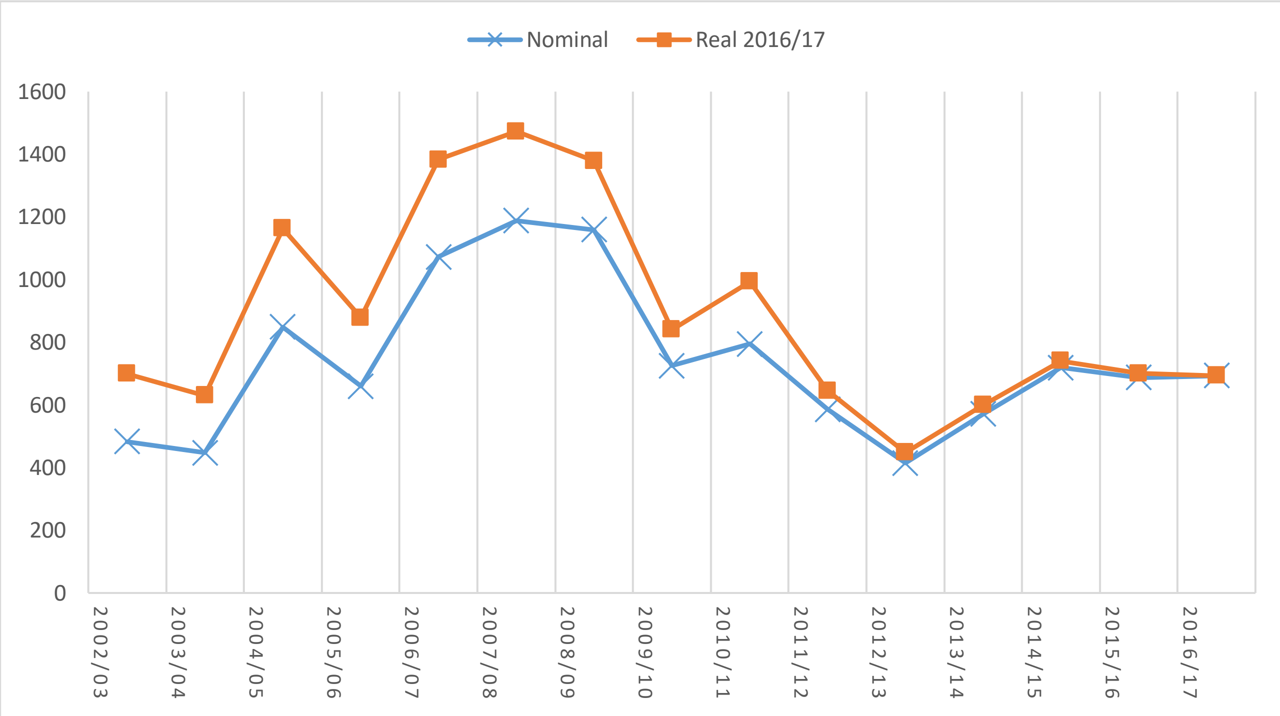

Figure 11-25: Building approvals Cairns/Far North Queensland statistical division-nominal and real

Source: Australian Bureau of Statistics Cat No. 8731.0.

This indicates that in real terms, the regional construction sector has recently been operating below historical capacity. The average for the past six years of $640 million is $410 million lower than the average for the preceding nine years of $1,050 million.

As indicated in Table 11-52, construction in Year 1 is low and is estimated to rise to a peak in Year 3 (2020-21) at $159.7 million. This level of around $160 million is not very large in the scale of past regional activity in the construction sector, which should therefore have the capacity to deliver the KUR-World project without severe resourcing/capacity challenges.

It is expected that the value of building approvals will rise over the years 2017-18, 2018-19 and 2019-20, due to the development of other substantial projects in the region, including the GA Group ($370 million - involving five high rise towers in the Cairns Central Business District) and the $170 million Cairns Convention Centre project. Also likely is the $187 million Marina Project at Port Douglas. However, most of this work is predicted to be completed by the time the KUR-World construction peak is reached in 2020-21.

Also possible is the Nova 8 project in Cairns that involves two high rise towers in its first phase with building value estimated at around $100 million with a start in 2018.

The general rise in construction involved from these projects is likely to result in a rise in employment and population growth and lead to a rise in the underlying rate of construction of dwellings and other commercial and community facilities.

The next three years may therefore see construction in the region rise from its recent low levels, to about average historical levels; but not to record levels and that the KUR-World project would not cause the level of construction to be so high that it would outrun normal capacities to supply.

The Thirkell report (Appendix 10) confirms capacity to supply material in the volumes required is within the normal framework of local manufacture, stocking and distribution capacity. It notes that the supply of concrete, timber and light steel fabrication work can be met by Tablelands' suppliers and there are some prospects for establishment of increased capacity in some fields on the Tablelands to manufacture trusses. There is also capacity for Tablelands businesses to stock materials originating from the south and travelling via the Palmerston Highway to the Tablelands. The report does note that some potential difficulties with blockwork construction and with minimising transport over the Kuranda Range Road, may be able to be achieved through adoption of appropriate building design.

11.4.3 Project operation

11.4.3.1 Revenue generation

A detailed assessment has been made for each of the activities, of numbers of visitors likely to be attracted and likely expenditure generated by months and years, starting from the Stage 1 commencement date in October 2018 for ten financial years ending March, 2018-19 to 2027-28.

The following Table 11-53 gives estimates of total operating revenue including property sales.

Table 11-53: KUR-World estimated operating revenue, year ending March 2018-19 to 2023-24

Year ending March	Est. operating revenue ($M)	Est. property sales ($M)	Total revenue ($M)
2018-19	$16.91	$31.50	$48.41
2019-20	$46.92	$46.15	$93.78
2020-21	$69.26	$70.70	$142.29
2021-22	$125.72	-	$125.79
2022-23	$134.75	-	$138.22
2023-24	$158.58	$184.50	$355.45
2024-25	$213.19	-	$213.66
2025-26	$218.28	-	$221.06
2026-27	$242.18	$125.80	$376.03
2027-28	$305.63	-	$275.36

Source: KUR-World – Reever & Ocean Developments Pty Ltd.

Operating revenue figures include an inflation rate throughout at RBA mid-range of 2.5% plus, in Years 2 and 3, and an extra factor of 1.0% recognising an ability to increase real prices in those years, making total increase 3.5% in those years.

The following Table 11-54 analyses the impact from operations. The detailed assessments have been summarised and grouped together into different industry categories as defined in Australian Bureau of Statistics (ABS) National Accounts input/output multiplier tables (ABS Cat 5209.0.55.001). For retail sales an estimate has been made of a proportion imported into the region and not included. (See Technical Note, Appendix 8B.)

In Table 11-55 expenditure is rendered back into 2017 dollars by deducting inflation at a rate of 2.5% per annum. It can be seen that total revenue will rise strongly each year through to 2027-28 to a fully operational level of $240million in 2017 prices.

Table 11-54: Total annual revenue from all KUR-World products by industry classification – original estimates

Year	Sport & Recreation	Heritage	Food & Beverage	Accommodation	Retail	Other services	Health	Technical Education Accommodation	Total
2018-19	$9,194,906	$4,323,296	$2,217,075	$1,174,088	$0	$0	$0	$0	**$16,909,364**
2019-20	$24,798,755	$10,025,157	$5,204,334	$6,891,532	$0	$0	$0	$0	**$46,919,778**
2020-21	$29,252,047	$15,075,999	$5,736,031	$17,212,327	$622,520	$425,590	$0	$0	**$68,324,515**
2021-22	$37,920,513	$26,015,440	$6,072,854	$47,942,912	$2,490,971	$1,538,877	$0	$0	**$121,981,567**
2022-23	$39,976,059	$28,853,971	$6,937,656	$50,537,191	$2,748,314	$1,577,349	$0	$0	**$130,630,539**
2023-24	$46,399,641	$31,938,014	$7,135,415	$63,875,878	$3,045,075	$1,616,909	$0	$0	**$154,010,933**
2024-25	$59,910,821	$32,736,464	$7,313,800	$102,058,901	$3,803,264	$1,657,332	$0	$0	**$207,480,583**
2025-26	$61,223,534	$33,554,875	$7,496,645	$104,550,947	$3,903,171	$1,698,766	$0	$0	**$212,427,938**
2026-27	$62,781,323	$34,393,747	$7,684,061	$121,694,907	$4,006,190	$1,741,235	$3,560,358	$308,078	**$236,169,899**
2027-28	$64,381,524	$35,253,591	$7,876,163	$169,168,884	$4,112,479	$1,784,766	$15,261,237	$1,618,252	**$299,456,895**

Source: KUR-World detailed revenue analysis – Cummings Economics – Allocation of industry classifications.

Table 11-55: Total annual revenue from all KUR-World products by industry classification deflated to 2017 values

Year	Sport & Recreation	Heritage	Food & Beverage	Accommodation	Retail	Other services	Health	Technical Education Accommodation	Total
2018-19	$9,194,906	$4,323,296	$2,217,075	$1,174,088	$0	$0	$0	$0	**$16,909,364**
2019-20	$24,193,907	$9,780,641	$5,077,400	$6,723,446	$0	$0	$0	$0	**$45,775,394**
2020-21	$27,842,519	$14,349,553	$5,459,637	$16,382,941	$592,524	$405,082	$0	$0	**$65,032,257**
2021-22	$35,212,966	$24,157,922	$5,639,249	$44,519,760	$2,313,114	$1,429,000	$0	$0	**$113,272,011**
2022-23	$36,216,336	$26,140,273	$6,285,174	$45,784,200	$2,489,837	$1,429,000	$0	$0	**$118,344,821**
2023-24	$41,010,522	$28,228,550	$6,306,667	$56,456,969	$2,691,403	$1,429,112	$0	$0	**$136,123,223**
2024-25	$51,660,913	$28,228,550	$6,306,667	$88,005,071	$3,279,543	$1,429,112	$0	$0	**$178,909,856**
2025-26	$51,505,231	$28,228,550	$6,306,667	$87,955,077	$3,283,602	$1,429,112	$0	$0	**$178,708,239**
2026-27	$51,527,555	$28,228,550	$6,306,667	$99,880,678	$3,288,067	$1,429,112	$2,922,151	$252,854	**$193,835,635**
2027-28	$51,552,112	$28,228,550	$6,306,667	$135,458,324	$3,292,978	$1,429,112	$12,220,105	$1,295,780	**$239,783,629**

Source: From Cummings Economics – deflated by 2.5% pa inflation.

Table 11-56: Total annual Gross Regional Product from all KUR-World products by industry classification deflated to 2018-19 values including flow-on type 1 multipliers, Cairns SA4 Region

Year	Sport & Recreation	Heritage	Food & Beverage	Accommodation	Retail	Other services	Health	Technical Education Accommodation	Total
2018-19	$6,156,909	$3,128,337	$1,628,220	$963,691	$0	$0	$0	$0	**$11,877,157**
2019-20	$16,200,240	$7,077,272	$3,728,842	$5,518,604	$0	$0	$0	$0	**$32,524,959**
2020-21	$18,643,351	$10,383,337	$4,009,557	$13,447,118	$492,743	$328,117	$0	$0	**$47,304,223**
2021-22	$23,578,602	$17,480,672	$4,141,465	$36,541,819	$1,923,586	$1,157,490	$0	$0	**$84,823,634**
2022-23	$24,250,459	$18,915,102	$4,615,832	$37,579,672	$2,070,548	$1,157,490	$0	$0	**$88,589,102**
2023-24	$27,460,646	$20,426,179	$4,631,616	$46,339,880	$2,238,171	$1,157,581	$0	$0	**$102,254,072**
2024-25	$34,592,148	$20,426,179	$4,631,616	$72,234,562	$2,727,268	$1,157,581	$0	$0	**$135,769,354**
2025-26	$34,487,903	$20,426,179	$4,631,616	$72,193,527	$2,730,643	$1,157,581	$0	$0	**$135,627,449**
2026-27	$34,502,851	$20,426,179	$4,631,616	$81,982,061	$2,734,356	$1,157,581	$2,524,739	$207,543	**$148,166,925**
2027-28	$34,519,294	$20,426,179	$4,631,616	$111,184,192	$2,738,441	$1,157,581	$10,558,171	$1,063,576	**$186,279,050**

Source: From previous Table Gross Value Added Multipliers plus Type 1, Cummings Economics – see Technical Notes, Appendix 8B

11.4.4 Impacts on Gross Regional Product including flow-on effects

Based on standard input/output multiplier tables (see Technical Note Appendix 8B), Table 11-56 above gives estimates of total impacts at Type 1 multiplier level (i.e. including flow-on impacts of purchase of inputs but not of expenditure of wages and salaries) on Gross Regional Product in the Cairns regional (SA4) economy. Total impact rises steadily to $186M in 2027-28.

11.4.5 Employment

Estimation of employment generated has been approached in two different ways.

The first has been to estimate employment generated based on input/output multiplier models (see Technical Note, Appendix 8B). This modelling has generated the following Table 11-57 which estimates initial employment generated and total employment generated including Type 1 flow-on effects.

Table 11-57: Estimated modelled employment generated

Year	Initial	Total incl. flow-on Type 1 level multiplier
2018-19	97	132
2019-20	265	359
2020-21	392	519
2021-22	716	925
2022-23	749	967
2023-24	864	1,114
2024-25	1,152	1,474
2025-26	1,151	1,472
2026-27	1,268	1,609
2027-28	1,622	2,026

Independently, as part of detailed assessment of revenue and other activity generated, required employment was modelled at peak level of operations, i.e. 2027-28, based on knowledge of employment in tourism operations in the Cairns region and this is summarised in Table 11-58 below.

Table 11-58: Summary of estimated FTE (Full Time Equivalent) employment in 2027-28

Employment Area	No.
5-star resort	184
4-star resort	205
Rainforest Education Centre	42
Glamping Experience	25
University dormitory	17
Farm-stay hotel/Lifestyle villas	17
Premium villas	46
Quad bikes/Zipline/Horse riding/Bushwalking tours	64
Cattle & Equestrian centre, Show & Dinner	44
Sporting & Recreation centre/Village hub	63
Golf course & club	56
Chapel/Lake House Centre	19
Indigenous Cultural/KUR-Cow Tourism Park/Organic Farm	54
Health & Wellbeing/Medical	40
University Campus	94

Employment Area	No.
Total	**970**

In some activities, there would be a substantial amount of casual employment and this is estimated to increase the total workforce to 1,450 (Full-Time and Part-Time jobs) or 970 FTE, and that Type 1 flow-on effects will generate in the order of an additional 410 jobs in the region.

Taking into account the fact that the input output modelling is not clear on 'full time' as opposed to 'part time' employment, the two approaches generally agree on the scale of workforce likely to be generated by the KUR-World project.

For more detailed information on local recruitment strategies refer to Chapter 21: tasks 40 – 43 and Appendix 20: commitments 90 - 97.

11.4.6 Impact of property sales

Activity generated by property sales in the region is generally estimated at: marketing 1% of sale value, sales (real estate) 2%, legal 0.5%, total 3.5%. Much of the marketing and sales activity is likely to take place outside the Cairns region. However, it can be expected that overseas buyers will visit the region to inspect properties (see Technical Note, Appendix 8B). Activity created within the Cairns region is estimated at 3% of sale value.

Table 11-59: Estimated impact of property sales

Year	Sales value ($M)	Est. regional activity generated output ($M)	Est. addition GRP Type 1 ($M)	Est. addition direct workforce	Est. addition total workforce plus Type 1 flow-on
2018-19	$31.50	$0.9	$0.7	5	5
2019-20	$46.15	$1.4	$1.1	7	8
2020-21	$70.70	$2.1	$1.6	11	12
2021-22	-	-	-	-	-
2022-23	-	-	-	-	-
2023-24	$184.50	$5.5	$4.2	29	32
2024-25	-	-	-	-	-
2025-26	-	-	-	-	-
2026-27	$125.80	$3.8	$2.9	20	22
2027-28	-	-	-	-	-

Regional flow-on and estimated addition to Gross Regional Product and employment is estimated in Table 11-59 using Type 1 multipliers as set out in Technical Note, Appendix 8B.

11.4.7 Impacts of additional spending outside the resort

11.4.7.1 Visitor numbers

The following Table 11-60 gives estimates of visitor numbers to the resort – day trippers and overnight stays.

Table 11-60: Estimated visitor numbers to KUR-World

Year	Day trip visitors	Overnight visitors
2018-19	102,967	1,195

Year	Day trip visitors	Overnight visitors
2019-20	237,038	11,711
2020-21	286,434	30,087
2021-22	361,989	84,245
2022-23	390,822	85,962
2023-24	433,306	107,826
2024-25	480,067	172,469
2025-26	480,265	172,469
2026-27	484,314	189,078
2027-28	496,644	240,697

11.4.7.2 Additional day visitor expenditure

For day trippers, the bulk of their expenditure on the day trip is generally included in their expenditure at the resort. It is estimated that 90% will arrive by coach with the transfer cost already included in resort revenues. Some 10% are estimated to arrive in their own vehicle. Estimated numbers and expenditure generated at an average of $30 per vehicle (25km x $0.60 per km two ways). Average two persons per vehicle is as follows in Table 11-61.

Table 11-61: Travel expenditure day visitors using their own vehicle

Year	Number	Est Expenditure ($M)
2018-19	10,297	$0.2
2019-20	23,704	$0.4
2020-21	28,643	$0.4
2021-22	36,199	$0.5
2022-23	39,082	$0.6
2023-24	43,331	$0.6
2024-25	48,007	$0.7
2025-26	48,027	$0.7
2026-27	48,431	$0.7
2027-28	49,664	$0.7

The following estimate (Table 11-62) is based on 90% of day visitors spending an average of $15 in Kuranda.

Table 11-62: Estimated KUR-World day tripper expenditure in Kuranda

Year	Number	Est Expenditure ($M)
2018-19	92,670	$1.4
2019-20	213,335	$3.2
2020-21	257,791	$3.9
2021-22	325,790	$4.9
2022-23	351,740	$5.3
2023-24	389,975	$5.8
2024-25	432,060	$6.5
2025-26	432,239	$6.5
2026-27	435,883	$6.5
2027-28	446,980	$6.7

In valuing the impact of attractions on the regional economy (e.g. the Great Barrier Reef, Daintree, Cape Tribulation), a convention has been adopted of counting on top of the direct spending on the visit to the attraction, additional visitor night spending on accommodation, food and drinks, etc., depending on the strength of the attraction and its role in generating visits to the region.

In the case of KUR-World, it would seem appropriate to attribute expenditure of one visitor night as being generated by a day trip, with an estimated expenditure summarised in Table 11-63 on accommodation/meals/ other (excluding the day trip expenditure) of $120 per person/per night[16].

Table 11-63: Estimated overnight expenditure by day visitors

Year	Number	Est. Expenditure ($M)
2018-19	102,967	$12.4
2019-20	237,038	$28.4
2020-21	286,434	$34.4
2021-22	361,989	$43.4
2022-23	390,822	$46.9
2023-24	433,306	$52.0
2024-25	480,067	$57.6
2025-26	480,265	$57.6
2026-27	484,314	$58.1
2027-28	496,644	$59.6

11.4.7.3 Additional overnight visitor expenditure

Overnight visitors are estimated to stay an average of three nights at the resort allowing two full days for activities. (Appendix 8B.)

Visitors staying overnight will spend an average of $330/person away from the resort on a main day tour, such as the Reef, Kuranda and Tablelands. It is also assumed that expenditure on a second day trip in the region (taking into account spending at KUR-World attractions), would be about $160. In addition, visitors moving through the airport create expenditure on airport operations, security, shopping etc. estimated at about $200 per visitor (Appendix 8B).

This makes an estimated total expenditure outside the resort of the order of $690/person which is summarised by year in Table 11-64.

Table 11-64: Estimated total overnight visitor expenditure in the region away from the resort

Year	Number	Est. expenditure ($M)
2018-19	1,195	$0.8
2019-20	11,711	$8.1
2020-21	30,087	$20.8
2021-22	84,245	$58.1
2022-23	85,962	$59.3
2023-24	107,826	$74.4
2024-25	172,469	$119.0
2025-26	172,469	$119.0
2026-27	189,078	$130.5

[16] Average spend per night for visitors to Cairns $208; Source Tourism Research Australia

2027-28	240,697	$166.1

Of this expenditure, 90% will visit Kuranda township. Average expenditure is estimated at $20 per person[17].

Table 11-65: Estimated expenditure in Kuranda by overnight stayers at KUR-World

Year	Numbers visiting	Expenditure
2018-19	1,076	$0.0
2019-20	10,540	$0.2
2020-21	27,079	$0.5
2021-22	75,821	$1.5
2022-23	77,366	$1.5
2023-24	97,044	$1.9
2024-25	155,222	$3.1
2025-26	155,222	$3.1
2026-27	170,170	$3.4
2027-28	216,627	$4.3

11.4.7.4 Summary of additional expenditure outside KUR-World

Table 11-66 below, summarises the additional expenditure generated outside of the resort.

Table 11-66: Summary of additional expenditure generated in the region by type

Year	In Kuranda	Other			
	Day visitors ($M)	Day visitors own vehicle ($M)	Day visitors night after ($M)	Overnight stay - outside tours ($M)	Total ($M)
2018-19	$1.4	$0.2	$12.4	$0.8	**$14.7**
2019-20	$3.2	$0.4	$28.4	$8.1	**$40.1**
2020-21	$3.9	$0.4	$34.4	$20.8	**$59.4**
2021-22	$4.9	$0.5	$43.4	$58.1	**$107.0**
2022-23	$5.3	$0.6	$46.9	$59.3	**$112.1**
2023-24	$5.8	$0.6	$52.0	$74.4	**$132.9**
2024-25	$6.5	$0.7	$57.6	$119.0	**$183.8**
2025-26	$6.5	$0.7	$57.6	$119.0	**$183.8**
2026-27	$6.5	$0.7	$58.1	$130.5	**$195.8**
2027-28	$6.7	$0.7	$59.6	$166.1	**$233.1**

Expenditure is estimated to split into industry classifications as follows.

11.4.7.5 Additional regional expenditure and employment

Table 11-67: Summary of additional expenditure generated in the region by industry classification

Year	Food & beverage ($M)	Retail ($M)	Import ($M)	Transport ($M)	Accommodation ($M)	Heritage ($M)	Total ($M)
2018-19	$0.5	$0.5	$0.7	$0.6	$12.4	$0.1	**$15**
2019-20	$2.1	$1.6	$2.2	$4.5	$28.4	$1.2	**$40**
2020-21	$4.1	$2.8	$4.0	$11.0	$34.4	$3.1	**$59**

[17] This expenditure would be included in the spending identified in Table 11-54.

Year	Food & beverage ($M)	Retail ($M)	Import ($M)	Transport ($M)	Accommodation ($M)	Heritage ($M)	Total ($M)
2021-22	$9.6	$6.1	$8.9	$30.2	$43.4	$8.7	**$107**
2022-23	$9.9	$6.3	$9.2	$30.8	$46.9	$8.9	**$112**
2023-24	$12.2	$7.7	$11.3	$38.6	$52.0	$11.2	**$133**
2024-25	$18.6	$11.5	$16.9	$61.4	$57.6	$17.9	**$184**
2025-26	$18.6	$11.5	$16.9	$61.4	$57.6	$17.9	**$184**
2026-27	$20.2	$12.4	$18.3	$67.3	$58.1	$19.6	**$196**
2027-28	$25.3	$15.3	$22.6	$85.4	$59.6	$24.9	**$233**

Applying input/output Type 1 multipliers gives the following estimates of impact including flow-on effects on Gross Regional Product, initial employment and total employment including flow-on as detailed in Table 11-68 and Table 11-69.

Table 11-68: Estimated impact including type 1 flow-on on gross value added in Cairns SA4 Region by additional expenditure generated outside the resort.

Year	Food & beverage ($M)	Retail ($M)	Import ($M)	Transport ($M)	Accommodation ($M)	Heritage ($M)	Total ($M)
2018-19	-	-	-	-	$10	-	**$11**
2019-20	$2	$1	-	$3	$23	$1	**$30**
2020-21	$3	$2	-	$8	$28	$2	**$44**
2021-22	$7	$5	-	$22	$36	$6	**$76**
2022-23	$7	$5	-	$22	$38	$6	**$79**
2023-24	$9	$6	-	$28	$43	$8	**$94**
2024-25	$14	$10	-	$44	$47	$13	**$127**
2025-26	$14	$10	-	$44	$47	$13	**$127**
2026-27	$15	$10	-	$48	$48	$14	**$135**
2027-28	$19	$13	-	$61	$49	$18	**$159**

Table 11-69: Estimated impact on total employment including type 1 flow-on in the Cairns SA4 region by additional expenditure generated outside the resort

Year	Food & beverage	Retail	Import	Transport	Accommodation	Heritage	Total
2018-19	5	5	-	4	109	1	**124**
2019-20	21	17	-	29	251	10	**327**
2020-21	41	29	-	70	303	25	**468**
2021-22	97	64	-	193	383	69	**805**
2022-23	100	66	-	197	414	70	**846**
2023-24	123	80	-	246	459	88	**996**
2024-25	188	119	-	392	508	141	**1,348**
2025-26	188	119	-	392	508	141	**1,348**
2026-27	204	129	-	429	513	155	**1,429**
2027-28	255	159	-	545	526	197	**1,682**

11.4.8 Ability of region to absorb the project

11.4.8.1 General

In assessing the KUR-World project's impact on the wider economy, it is necessary to determine whether the growth in demand for the type of product offered (natural or stimulated by the project), will be sufficient to accommodate the project. In other words, will the capacity offered by the project be at the expense of other existing supply of product in the market?

11.4.8.2 Likely growth of tourism in the Cairns region

Apart from some relatively short periods of adverse conditions, tourism has been the key growth sector in the Cairns region over a long period of time, with a number of major factors involved. The first being a long-term trend for world per capita incomes to progressively expand. This, combined with falling transport costs, has led to a progression of long-haul markets opening up.

For the Tropical North Queensland region, there has been a progressive shift in visitors from southern Australia and New Zealand in the 1960s–70s, to North America in the 1970s, UK/Europe in the 1980s & 1990s (expanding progressively from UK, Germany, Scandinavia to other European countries), and a large increase from Japan in the 1990s. Over the past decade, China has emerged as a major growth market and is included in Table 11-70.

Table 11-70: Growth in visitor numbers, Tropical North Queensland

Year	International ('000)	Domestic ('000)	Total ('000)
2005	853	1,282	**2,135**
2006	855	1,599	**2,454**
2007	836	1,514	**2,350**
2008	757	1,571	**2,328**
2009	655	1,565	**2,220**
2010	686	1,350	**2,036**
2011	588	1,487	**2,075**
2012	661	1,504	**2,165**
2013	685	1,594	**2,279**
2014	739	1,685	**2,424**
2015	781	1,750 [18]	**2,531**
2016	901	1,896	**2,797**

Source: Cummings Economics from Tourism Research Australia (TRA).

As part of this picture, the following Table 11-71 gives numbers of visitors recorded from China for Tropical North Queensland (TNQ) compared with Australia overall.

Table 11-71: Growth in Chinese visitor numbers, Tropical North Queensland and Australia.

Year	Tropical North Qld '000	Australia '000
2005	35	270
2006	32	293
2007	58	336
2008	57	332
2009	41	341
2010	72	424
2011	73	505

[18] TRA figures for this year was defective. The figure of 1,750 is an estimate.

2012	106	586
2013	142	665
2014	157	784
2015	174	952
2016	229	1116
Average annual growth 2005-2016	***18.5%***	***13.8%***

Source: Cummings Economics from Tourism Research Australia (TRA).

The average annual growth to TNQ from China over the five years 2010-11 to 2015-16 was 25.7% per annum. Of all Australian visitors from China, one in five (20%) visit the Cairns/TNQ region.

The population in China is ten times that of Japan and as with Japan, Cairns is accessible by direct non-stop flights from Chinese cities. At its peak, with a favourable dollar and direct air services, visitation from Japan peaked at about 250,000. Indications are that when at similar levels of income to Japan (GDP per capita 2015 $US 34,629), and with a favourable Australian dollar exchange rate and direct air services from mainland cities, the equivalent potential Chinese market for Cairns would be 2.5 million visitors.

The recent announcement of five flights a week to Cairns from mainland Chinese cities is expected to carry additional traffic of at least 1,000 a week (c.50,000 a year) representing about a 25% increase on recent levels. However, it seems likely that the Chinese rate of growth in GDP will gradually slow and also see the rate of outbound tourism growth slow. Achievement of direct flights from mainland Chinese cities is likely to see an acceleration of visitor numbers to Cairns in the short run but a progressive slowing of the rate of growth over time.

Over the past five years, Chinese visitor numbers to Cairns have averaged a growth of 25.7% pa. Indications are that due to restrictions in flights over Chinese New Year, 2017 will show limited growth over 2016 levels - say 5%. However, a 25% increase is expected in 2018 with the scheduling of additional flights. After that, a scenario of 15% pa has been adopted for four years to 2022 and 5% thereafter, to 2028.

The following Table 11-72 projects growth in other international markets at an average of 2% pa (cf 5.4% pa last 5 years) and growth in the domestic market at 2.5% pa (cf av 2005-2016 2.5% pa).

Table 11-72: Projected increase in visitor numbers

Year	Chinese visitors ('000)	Other international visitors ('000)	Domestic visitors ('000)	Total ('000)
2016	229	671	1,896	**2,796**
2017	240	685	1,943	**2,868**
2018	303	698	1,992	**2,993**
2019	349	712	2,042	**3,103**
2020	401	727	2,093	**3,221**
2021	462	741	2,145	**3,348**
2022	531	756	2,199	**3,486**
2023	558	771	2,254	**3,583**
2024	585	787	2,310	**3,682**
2025	615	803	2,368	**3,786**
2026	645	819	2,469	**3,933**
2027	678	835	2,488	**4,001**
2028	712	852	2,550	**4,114**
Growth in Numbers 2024 on 2016	**482**	**181**	**654**	**1,318**

Source: Cummings Economics.

On the basis of the above projected growth rate, the indications are that over the period through to 2027-28, visitor numbers in the region seem likely to rise by the order of 1.3 million, from 2.8 to 4.1 million, i.e.

at an average rate of 3.2% per annum; with about 40% of the increase due to the growth in numbers attributable to the Chinese market. This compares with 2.3% per annum over the 8 years 2008 to 2016 and a 6.2% per annum rise over the past 5 years.

Estimated additional visitor nights by 2027-28 at latest average length of stay of six nights (TRA 2015), is about 8 million. Estimated visitor nights in accommodation at KUR-World in 2027-28 are about 720,000. Day visitors to KUR-World are estimated at 500,000 and compare with an estimate of 8 million additional regional visitor days. KUR-World is therefore not out of scale with the market's ability to absorb the project.

The additional economic impacts outlined above will therefore not need to be moderated to take account of reductions in other existing operations.

11.4.9 Economic impact of construction and operational phases

11.4.9.1 Summary of estimated impacts construction and operational phases

The following tables (Table 11-73 to Table 11-76) look at total estimated impacts through expenditure generated on construction and operations at the resort, and generated outside of the resort attributable to the project. A notable feature of the project compared with many mining and energy projects is that activity and employment generated will not see a permanent slow down once the construction phase is completed, only a minor short-term dip during 2022-2023.

Table 11-73: Estimated total output (direct expenditure), Cairns SA4 Region

Year	Construction ($M)	At resort ($M)	Away from resort ($M)	Property sales ($M)	Total ($M)
2018-19	$87.90	$16.9	$14.7	$0.9	**$120.4**
2019-20	$132.10	$45.8	$40.1	$1.4	**$219.4**
2020-21	$159.70	$65.0	$59.4	$2.1	**$286.2**
2021-22	$117.80	$113.3	$107.0	-	**$338.1**
2022-23	$78.50	$118.3	$112.1	-	**$308.9**
2023-24	$93.20	$136.1	$132.9	$5.5	**$367.7**
2024-25	$106.80	$178.9	$183.8	-	**$469.5**
2025-26	$59.80	$178.7	$183.8	-	**$422.3**
2026-27	$19.40	$193.8	$195.8	$3.8	**$412.8**
2027-28	-	$239.8	$233.1	-	**$472.9**

Table 11-74: Estimated addition to Gross Regional Product resulting from flow-on type 1, Cairns SA4 Region

Year	GRP construction ($M)	GRP at resort ($M)	GRP away from resort ($M)	Property sales ($M)	GRP Total ($M)
2018-19	$61	$11.9	$11	$0.7	**$84.6**
2019-20	$89	$32.5	$30	$1.1	**$152.6**
2020-21	$110	$47.3	$44	$1.6	**$202.9**
2021-22	$79	$84.8	$76	-	**$239.8**
2022-23	$51	$88.6	$79	-	**$218.6**
2023-24	$59	$102.3	$94	$4.2	**$259.5**
2024-25	$68	$135.8	$127	-	**$330.8**
2025-26	$38	$135.6	$127	-	**$300.6**
2026-27	$13	$148.2	$135	$2.9	**$299.1**
2027-28	-	$186.3	$159	-	**$345.3**

Table 11-75: Estimated Initial Employment, Cairns SA4 Region

Year	Construction	At resort	Away from resort	Property sales	Total
2018-19	128	80	103	5	**316**
2019-20	299	223	269	7	**798**
2020-21	348	329	380	11	**1,068**
2021-22	299	596	641	-	**1,536**
2022-23	234	639	674	-	**1,547**
2023-24	303	752	791	29	**1,875**
2024-25	347	1,011	1,060	-	**2,418**
2025-26	194	1,036	1,060	-	**2,290**
2026-27	61	1,149	1,122	20	**2,352**
2027-28	-	1,450	1,313	-	**2,763**

Table 11-76: Estimated total modelled employment including flow-on type 1, Cairns SA4 Region

Year	Generated by construction	Generated by expenditure at resort	Generated by expenditure away from resort	Property sales	Total
2018-19	334	103	124	5	**566**
2019-20	606	286	327	8	**1,227**
2020-21	713	422	468	12	**1,615**
2021-22	575	765	805	-	**2,145**
2022-23	422	820	846	-	**2,088**
2023-24	529	965	996	32	**2,522**
2024-25	607	1,297	1,348	-	**3,252**
2025-26	339	1,329	1,348	-	**3,016**
2026-27	106	1,474	1,429	22	**3,031**
2027-28	-	1,860	1,682	-	**3,542**

The GRP of the Cairns SA4 region has been estimated in 2017 to be in the order of $13.3 billion and could be expected to be of the order of $13.7 billion in 2018-19 (in 2017 values) at a real growth rate of 2% pa and rise to the order of $16.4 billion by 2027-28. The impact of the KUR-World project on Gross Regional Product (in 2017 values) is therefore estimated to be $345 million in 2027-28 - an addition to GRP of about 2.0% in 2027-28.

11.4.9.2 Impact on employment

The current employed workforce in the Cairns region is estimated to be 110,000 and to be in the order of 130,000 by 2027-8. The KUR-World workforce, at about 2,763 when the resort is fully developed, would therefore add directly about 2.1% to the workforce and with flow-on effects, this rises to about 2.7% of the workforce.

11.4.10 Workforce impacts

11.4.10.1 Construction phase workforce

The following section provides an analysis of where the construction workforce directly employed on the project is likely to reside. The Census 2016 data indicates the following workforce involved in construction relating to Kuranda.

Table 11-77: Employment in construction, Census 2016

Industry sector	Resident & working in Kuranda	Resident Kuranda, working Cairns	Resident Kuranda, working elsewhere	Total No.
Construction, nfd	3	9	-	**12**
Building Construction, nfd	3	4	3	**10**
House Construction	4	9	3	**16**
Other Residential Building Construction	3	-	3	**6**
Non-Residential Building Construction	6	4	-	**10**
Road and Bridge Construction	-	3	-	**3**
Concreting Services	3	-	-	**3**
Roofing Services	-	-	3	**3**
Plumbing Services	-	3	3	**6**
Electrical Services	9	4	-	**13**
Plastering and Ceiling Services	-	-	3	**3**
Carpentry Services	4	-	3	**7**
Painting and Decorating Services	5	-	10	**15**
Landscape Construction Services	3	-	-	**3**
Other Construction Services nec	5	4	3	**12**
Total	**48**	**40**	**34**	**122**

Source: Cummings Economics from ABS, Census 2016 data.

Table 11-77 shows that 122 people lived in Kuranda and worked in the construction sector; of these, 40 worked in Cairns and 34 in locations other than Kuranda. It can be reasonably expected that a number of Kuranda workers currently travelling to Cairns and elsewhere will find employment locally in the construction of KUR-World. The following analysis provides that about 25 - 30 of the 74 indicated by the Census 2016 as travelling away from Kuranda to work will switch to work on the resort construction. The 2016 Census also indicates that there is a substantial workforce from the rest of the Mareeba/Tablelands area employed in construction (totalling 1270). A substantial part of the workforce required for resort construction will therefore be able to be drawn from the wider Tablelands.

There will also be an opportunity to employ some currently unemployed Kuranda residents (a total of 182 at the time of the 2016 Census), as well as some people who are underemployed. However, given other opportunities at the resort operations, fairly low numbers are modelled relating to construction, with priority given to the works in the early years of construction before resort operations ramp up.

It is expected that most professional employment generated will be located in Cairns offices and not travel daily to the site.

During peak construction periods, it is likely that workers will locate temporarily in Kuranda. It is assumed that arrangements to cater for up to 100 skilled workers will be made with providers such as the caravan park or otherwise with temporary accommodation, with requirements estimated at 50 new residents in Kuranda working on KUR-World construction (Table 11-78). About 30% are estimated to travel from Cairns (see Technical Note, Appendix 8B).

Table 11-78: KUR-World estimated location of employment by place of residence, construction phase cont'd

Years	Kuranda travel outside	Kuranda un/underemployed	Kuranda[19] new residence	On-site	Tablelands [20]Other	Cairns	Cairns Office	Total
	Total Allocation of Employment							
2018/19	24	15	0	0	35	24	30	**128**
2019/20	30	29	20	0	100	90	30	**299**
2020/21	25	20	50	0	98	105	50	**348**
2021/22	25	20	50	0	106	68	30	**299**
2022/23	24	15	50	0	87	48	11	**235**
2023/24	20	15	50	0	120	98	0	**303**
2024/25	20	15	50	0	150	112	0	**347**
2025/26	20	15	50	0	80	25	3	**193**
2026/27	10	10	0	0	31	0	11	**62**
2027/28	0	0	0	0	0	0	0	**0**
Total	**198**	**154**	**320**	**0**	**807**	**570**	**165**	**2214**
%	***9%***	***7%***	***14%***	***0%***	***36%***	***26%***	***7%***	***100%***

11.4.10.2 Operational workforce

The following Table 11-79 summarises the estimated workforce required when fully operational in 2023-24 by type of occupation and an estimate of likely numbers part time.

Table 11-79: Summary of workforce requirements by occupation category, 2023-24

Occupation category	FTE	Est full time	Est part time	Total
Housekeeping attendants (30/70)	212	64	296	**360**
Grounds & maintenance attendants (60/40)	85	51	68	**119**
Reception & reservation senior management professionals (60/40)	109	65	87	**152**
Senior management professionals (100/0)	35	35	0	**35**
Sales & marketing professionals (100/0)	39	39	0	**39**
Finance administration & IT professionals including university staff 77 (100/0)	91	91	0	**91**
Food & beverage attendants (30/70)	217	65	304	**369**
Day spa attendants (30/70)	15	5	20	**25**
Instructors, guides & performers (40/60)	108	43	130	**173**
Stable hands/animal minders (70/30)	14	10	8	**18**
Retail attendants (30/70)	33	10	46	**56**
Health professionals (90/10)	12	11	2	**13**
Total	**970**	**489**	**961**	**1,450**

[19] During the construction period, this element of workforce is assumed to live in temporary accommodation such as caravan parks, dongas and the like.

[20] It is assumed that employment from other Tablelands centres will be given preference and encouraged by providing daily coach transport from Mareeba to site.

Note: Ratio full time/part time is 34% to 66%

This total of approximately 1,450 employees compares with the workforce in Kuranda, projected forward due to estimated normal growth (without KUR-World) to 2027-28, as follows in Table 11-80.

Table 11-80: Projected Kuranda workforce (without KUR-World), 2027-28

Workforce	Census 2016	Est.[21] 2027-28
Unemployed	182	205
Workforce employed	1,823	2,054
Full time 62%	*1,007*	*1,135*
Part time 38%	*692*	*780*

Table 11-81: Estimated location of Kuranda employment, 2027-28

Working Kuranda area	Census 2016	Adjusted[22] Census 2016	Est 2027-28
Kuranda residents	735	751	846
Residents from outside working in Kuranda	335	302	385
Total employment Kuranda area	**1,070**	**1,093**	**1,232**
Kuranda residents working outside	1,049	1,072	1,208
Total Kuranda residents employed	**1,784**	**1,823**	**2,054**

It is therefore estimated that with projected employment of about 1,450 the project could about double the jobs located in Kuranda by 2027-28, assuming a continuing growth of jobs at long-term trend growth rate of 1.0% per annum as detailed in Table 11-81.

There are four main ways of filling resort jobs:

a) from employment of existing Kuranda residents unemployed or under-employed
b) from existing Kuranda residents working outside Kuranda taking up local jobs at the resort
c) by outside residents travelling into Kuranda to work at the resort
d) through new residents moving into Kuranda area to take up jobs at the resort or jobs replacing workers in local jobs who have taken up work at the resort.

Census 2016 employment data by occupation and industry has been analysed to identify the degree to which positions might be filled by existing Kuranda residents currently travelling to work outside the area. The following comments by classes of employment required compared with data about workforce composition from the 2016 Census. Numbers recorded as living in Kuranda but working outside were as follows.

Table 11-82: Workforce residing in Kuranda but working outside by selected industry category, 2016 Census

Industry category	Cairns	Mareeba/Other Tablelands	Other Queensland	Total
Accommodation & food services	21	3	25	**49**
Transport	41	3	13	**57**

[21] Estimated expansion at average 1.0% per annum, ie. workforce residing in the area increasing at a slower than trend population growth of 1.5% per annum.
[22] To bring numbers up to level in above table including those away from work at census time.

Education & training	77	16	18	**111**
Health services	122	33	28	**181**
Arts and recreation services	12	7	5	**24**

The data in Table 11-82 indicates the potential for almost all employees required in road transport, health and education to come from existing Kuranda residents currently working outside the area. However, most of those in the accommodation and food services and arts and recreation categories would not be able to be drawn from those travelling outside of Kuranda to work.

The following Table 11-83 shows data by type of workforce requirement and census data by occupation.

Table 11-83: Kuranda residents working outside Kuranda, compared with resort requirements

Housekeeping/attendants		
Est. requirements	**311**	(mainly casual)
Residing Kuranda working outside (housekeepers)	**17**	
Commercial Cleaner	3	
Housekeepers	7	
Commercial Housekeeper	4	
Other Cleaners	3	
Note: These are relatively unskilled jobs and will be able to be filed by currently unemployed and underemployed people. There will be substantial capacity to draw on the remaining Tablelands area but travel costs relative to earnings would need attention.		

Grounds & maintenance attendants		
Est. requirements	**119**	(heavily part time)
Residing Kuranda working outside	**69**	
Property Manager	4	
Crop Farm Workers	5	
Fruit or Nut Farm Worker	5	
Garden and Nursery Labourers	9	
Garden Labourer	3	
Handyperson	3	
Motor Mechanics	5	
Motor Mechanic (General)	5	
Plumber (General)	6	
Electricians	12	
Electrician (General)	12	
Note: This is a mix of relatively unskilled and trade workers. There are relevant trade workers travelling out of Kuranda to work and there will be local contractors. There will be an opportunity to provide work to those currently unemployed and it is possible that contractors and those with relevant trades in this field will have some capacity to supply the resort's needs. There will be business opportunities in this field.		

Reception & reservation		
Est. requirements	**140**	
Residing Kuranda working outside	**63**	
Secretaries	3	
General Clerk	30	
Keyboard Operators	4	
Information Officer	7	

Reception & reservation		
Receptionists	6	
Receptionist (General)	3	
Hotel or Motel Receptionist	3	
Medical Receptionist	7	
Note: A substantial proportion of this type of staff could be recruited from residents currently travelling outside of Kuranda to work.		

Senior managers – professionals		
Est. requirements	**34**	
Residing Kuranda working outside	**73**	
Chief Executive or Managing Director	3	
General Managers	8	
Corporate General Manager	8	
Specialist Managers	5	
Corporate Services Manager	7	
Human Resource Manager	8	
ICT Managers	3	
Other Specialist Managers	3	
Specialist Managers nec	3	
Call or Contact Centre and Customer Service Managers	9	
Customer Service Manager	9	
Conference and Event Organiser	3	
Other Hospitality, Retail and Service Managers	4	
Note: A significant number may be able to be recruited among locals currently traveling out of Kuranda to work. Some senior managers are likely to be recruited from outside and live onsite or in company residences as part of their package.		

Sales & marketing – professionals		
Est. requirements	**24**	
Residing Kuranda working outside	**19**	
Advertising, Public Relations and Sales Managers	5	
Sales and Marketing Manager	5	
Advertising and Marketing Professionals	3	
Sales Representatives	3	
Sales Representative (Business Services)	3	
Note: Whilst some could be drawn from Kuranda residents currently travelling outside to work, a number will probably be employed by specialist firms located in Cairns and hence expertise not provided at the resort. It is also probable KUR-World would establish a sales and marketing office in Cairns.		

Finance & administrative & professionals including university professionals		
Est. requirements	**91**	
Residing Kuranda working outside	**114**	
Finance Manager	3	
ICT Project Manager	3	
Accountants	3	
Accountant (General)	3	

Finance & administrative & professionals including university professionals		
Other Information and Organisation Professionals	3	
Marketing Specialist	3	
University Lecturers and Tutors	10	
University Lecturer	10	
ICT Support Technicians	3	
ICT Customer Support Officer	3	
Stock Clerk	3	
Human Resources Clerk	3	
Inspectors and Regulatory Officers	9	
Other Miscellaneous Clerical and Administrative Workers	4	
Checkout Operators and Office Cashiers	6	
Contract Administrator	3	
Office Manager	12	
Accounting Clerks	4	
Accounts Clerk	4	
Bookkeeper	8	
Other Clerical and Office Support Workers	7	
Clerical and Office Support Workers nec	3	
Purchasing and Supply Logistics Clerks	4	
Note: It appears likely that a high proportion of these positions could be drawn from those currently residing in but working outside Kuranda, although some may be employed by specialist service providers in Cairns or with a sales and marketing office in Cairns.		

Food & beverage attendants		
Est. requirements	**358**	(heavily casual)
Residing Kuranda working outside	**42**	
Fast Food Cook	6	
Kitchenhand	3	
Shelf Filler	8	
Chef	6	
Bar Attendants and Baristas	4	
Bar Attendant	3	
Barista	4	
Waiter	8	
Note: Some of these could come from existing residents currently travelling outside Kuranda. There will be an opportunity to draw some from Kuranda's unemployed or underemployed. There is a substantial potential pool on the Tablelands but travel costs compared with the part-time nature of much of the work would need to be taken into account.		

Instructors, guides & performers		
Est. requirements	**154**	
Residing Kuranda working outside	**36**	
Actors, Dancers and Other Entertainers	3	
Environmental Scientists	9	
Environmental Research Scientist	3	
Park Ranger	3	
Botanist	5	

Instructors, guides & performers		
Bus and Coach Drivers	3	
Tour Guide	7	
Outdoor Adventure Guides	3	

Note: There is only a small number currently living in but working outside Kuranda. There is a substantial opportunity to draw guides and rangers from unemployed Indigenous people (with appropriate training), and for those required for cattle handling and horse shows to come from a major skilled capacity in the Mareeba/Tablelands area.

Day spa attendants		
Est. requirements	**25**	
Residing Kuranda working outside	(see health professionals below)	

Note: There would be substantial capacity to draw existing health workers travelling outside to work.

Stable hands		
Est. requirements	**18**	
Residing Kuranda working outside	**6**	
Animal Attendants and Trainers	6	

Note: There is existing local employment and apart from those currently unemployed, a major capacity is available from the wider Tablelands.

Retail attendants		
Est. requirements	**46**	
Residing Kuranda working outside	**78**	
Retail Managers	16	
Retail Manager (General)	12	
Sales Assistant (General)	37	
Retail Supervisor	7	
Checkout Operator	6	

Note: Virtually all this staffing requirement could come from existing residents currently travelling outside to work.

Health professionals		
Est. requirements	**13**	
Residing Kuranda working outside	**64**	
General Practitioners and Resident Medical Officers	4	
General Practitioner	4	
Registered Nurses	38	
Registered Nurses	4	
Registered Nurses nec	3	
Enrolled Nurse	4	
Nursing Support and Personal Care Workers	4	
Nursing Support Worker	3	

Note: There is a potential for most of this staff could come from Kuranda residents currently travelling outside to work.

In relation to the potential availability of workforce from the wider Tablelands, Table 11-84 below sets out workforce by occupation for the Mareeba and Tablelands Local Government Areas at the 2016 Census.

Table 11-84: Workforce residing on Mareeba/Atherton Tablelands by industry category, ABS 2016 Census

Industry category	No.
Accommodation & food services	1,122
Arts and recreation services	348
Construction	1,390

The indications are that on the Tablelands, there is already a substantial workforce employed in relevant fields. Although KUR-World will increase employment in these fields, there is already a substantial pool of workers in the area in these categories as described in Table 11-85.

Table 11-85: Mareeba/ Atherton Tablelands (excluding Kuranda SA2) workforce (ABS 2016 Census) compared with resort requirements

Housekeeping/attendants		
Est. requirements	**311**	(mainly casual)
Residing Mareeba/Tablelands working outside (housekeepers)	**459**	
Commercial Cleaners	259	
Domestic Cleaners	72	
Housekeepers	52	
Laundry Workers	15	
Other Cleaners	16	
Note: This category will require special training attention, as well as potential transport assistance.		

Grounds & maintenance attendants		
Est. requirements	**119**	(heavily part time)
Residing Mareeba/Tablelands	**1,004**	
Automotive and Engineering Trades Workers, nfd	14	
Motor Mechanics	181	
Electricians	152	
Air-conditioning and Refrigeration Mechanics	21	
Gardeners	91	
Greenkeepers	22	
Nurserypersons	15	
Hotel Service Managers	5	
Security Officers and Guards	24	
Store persons	61	
Labourers, nfd	58	
Farm, Forestry and Garden Workers, nfd	55	
Garden and Nursery Labourers	93	
Other Farm, Forestry and Garden Workers	33	
Caretakers	19	
Handypersons	55	
Recycling and Rubbish Collectors	4	
Other Miscellaneous Labourers	101	

Grounds & maintenance attendants		
Note: There is a large potential workforce in this category.		

Reception & reservations		
Est. requirements	**140**	
Residing Mareeba/Tablelands	**451**	
Information Officers	47	
Receptionists	186	
Other Sales Assistants and Salespersons	36	
Checkout Operators and Office Cashiers	177	
Other Sales Support Workers	5	
Note: There is a large potential workforce to draw from.		

Senior managers – professionals		
Est. requirements	**34**	
Residing Mareeba/Tablelands	**159**	
Chief Executives and Managing Directors	47	
Hospitality, Retail and Service Managers, nfd	6	
Accommodation and Hospitality Managers, nfd	3	
Hotel and Motel Managers	68	
Licensed Club Managers	11	
Other Accommodation and Hospitality Managers	24	
Note: There is a large pool of managers. Specialist skills for resort managers may need to be drawn from outside.		

Sales & marketing – professionals		
Est. requirements	**24**	
Residing Mareeba/Tablelands	**23**	
Sales, Marketing and Public Relations Professionals, nfd	6	
Advertising and Marketing Professionals	14	
Public Relations Professionals	3	
Note: There is a substantial pool to draw from but some training may be necessary in relation to tourism.		

Finance & administrative & professionals including university professionals		
Est. requirements	**91**	
Residing Mareeba/Tablelands	**1,290**	
Finance Managers	31	
Human Resource Managers	20	
Accountants	71	
Auditors, Company Secretaries and Corporate Treasurers	3	
Human Resource Professionals	33	
Tertiary Education Teachers, nfd	3	
University Lecturers and Tutors	6	
Vocational Education Teachers (Aus) / Polytechnic Teachers (NZ)	34	
Office Managers	163	
Personal Assistants	32	
Secretaries	89	

Finance & administrative & professionals including university professionals		
General Clerks	384	
Keyboard Operators	34	
Accounting Clerks	97	
Bookkeepers	183	
Payroll Clerks	21	
Other Clerical and Office Support Workers	32	
Logistics Clerks, nfd	5	
Purchasing and Supply Logistics Clerks	49	
Note: Very large pool relative to requirements.		

Food & beverage attendants		
Est requirements	**358**	(heavily casual)
Residing Mareeba/Tablelands	**611**	
Cafe and Restaurant Managers	74	
Hospitality Workers, nfd	10	
Bar Attendants and Baristas	119	
Cafe Workers	54	
Waiters	82	
Food and Drink Factory Workers	59	
Fast Food Cooks	55	
Food Trades Assistants	11	
Kitchenhands	147	
Note: There is smaller pool to draw from in relation to requirements. Special attention to appropriate training of unemployed people and transport will be needed.		

Instructors, guides & performers		
Est. requirements	**154**	
Residing Mareeba/Tablelands	102	
Actors, Dancers and Other Entertainers	5	
Environmental Scientists	74	
Gallery, Museum and Tour Guides	23	
Note: Special attention to appropriate training will be required in meeting this category.		

Day spa attendants		
Est. requirements	**25**	
Residing Mareeba/Tablelands	(see health professionals below)	

Stable hands		
Est. requirements	**18**	
Residing Mareeba/Tablelands	**160**	
Livestock Farm Workers	160	
Note: There is a very large pool to draw from.		

Retail attendants		
Est. requirements	**46**	
Residing Mareeba/Tablelands	**1177**	
Retail Managers	320	
Sales Assistants and Salespersons, nfd	5	
Sales Assistants (General)	802	
Retail Supervisors	50	
Note: A very large pool available to draw from.		

Health professionals		
Est requirements	**13**	
Residing Mareeba/Tablelands	**569**	
Health and Welfare Services Managers	30	
Health Professionals, nfd	6	
Medical Imaging Professionals	9	
Occupational and Environmental Health Professionals	28	
Pharmacists	28	
Other Health Diagnostic and Promotion Professionals	3	
Complementary Health Therapists	5	
Podiatrists	4	
General Practitioners and Resident Medical Officers	77	
Other Medical Practitioners	5	
Nurse Managers	11	
Registered Nurses	340	
Medical Technicians	23	
Note: There is very large potential pool available to draw from.		

As the following indicates (Table 11-86), apart from those Mareeba/Tablelands residents working outside the Mareeba/Tablelands area in Cairns and the rest of the region (as at Census 2016), there are substantial numbers of Tablelands residents working further afield, especially in mining and construction (much of this is also likely to be related to mining) on a FIFO basis.

Table 11-86: Residing Mareeba/ Atherton Tablelands LGAs (excluding Kuranda) – working outside Mareeba/ Atherton Tablelands LGAs (excluding Kuranda, ABS 2016 Census

Region	No.
Cairns	609
Douglas	218
Cassowary Coast	6
Outback Queensland incl. Peninsula	261
Townsville Region	57
Mackay Region	69
Fitzroy Region	39
Northern Territory	124
Outback Western Australia	18

Based on this information, the employment plan set out in Table 11-87below, seeks to allocate employment in 2027-28 in line with the following principles *(cf Queensland Department of State Development, Coordinator General - Draft Social Impact Assessment Guideline – Oct 2016)*:

a) Preference to be given to people currently travelling outside Kuranda for work;
b) Training locally unemployed people to fill workforce requirements;
c) Recruiting substantial numbers of locally underemployed people;
d) Drawing workforce from the wider Tablelands wherever possible;
e) Minimising the need to draw workforce from Cairns;
f) Establishing a Cairns sales and administration office; and
g) Accommodating some staff on site.

In order to ensure the employment plan is successful different strategies will be put in place. For example, training requirements and partnerships will be established to enable preferential employment of locals, especially young Indigenous people in accordance with skill requirements identified. Key partnerships will include:

- Q.I.T.E (Quality, Innovation, Training and Employment), one of the largest providers of employment services in the region and works along business to ensure enterprises can provide opportunities for work experience, skills training, and employment.
- My Pathway, which proves education, training and employment services while building stronger communities.

Partnerships with these providers will facilitate training and recruitment while ensuring the local community has priority on training and employment matters. Additional mechanisms to guarantee employment of locals and training will be developed with Q.I.T.E and My Pathway as the project progresses. Additional information regarding workforce management can be found on Chapter 21 (Environmental Monitoring and Management Plan).

Table 11-87: Estimated residential location of employees – Operational phase – Peak 2027-28

Occupation category	Travel outside	Unemployed/ Under-employed	Local new residents	Local onsite	Tablelands	Cairns	Cairns office	Total
Housekeepers	10	70	100	-	90	96	-	**360**
Grounds & maintenance	20	30	30	-	21	18	-	**119**
Reception reservations	40	-	20	-	35	47	10	**152**
Senior managers professional	5	-	20	-	-	10	-	**35**
Sales & marketing	5	-	9	-	5	10	10	**39**
Finance, administration & university professionals	50	-	20	-	-	10	11	**91**
Food, beverage attendants	20	10	89	25	105	120	-	**369**
Instructors guides performers	15	10	38	-	60	50	-	**173**
Day spa attendants	10	-	10	-	5	-	-	**25**
Stable hands	-	8	-	-	10	-	-	**18**
Retail attendants	36	-	10	-	10	-	-	**56**
Health professionals	13	-	-	-	-	-	-	**13**

Occupation category	Travel outside	Unemployed/ Under-employed	Local new residents	Local onsite	Tablelands	Cairns	Cairns office	Total
Total	224	128	346	25	341	355	31	1,450
Percent	*15.4%*	*8.8%*	*23.8%*	*1.7%*	*23.5%*	*24.5%*	*2.1%*	*100%*

Assumptions in Table 11-87

a) *About 220 of the estimated 800 traveling outside of Kuranda to work in Cairns by 2027-28 would become locally employed at the resort.*
b) *Out of the approximately 200 local unemployed (182 at Census 2016), and underemployed (Census 2016 approximately 700 in part-time work), about 130 would find employment at the resort.*
c) *About 340 would be employed on a daily drive-in basis from elsewhere in the Mareeba/Tablelands area.*
d) *About 350 would be drawn from Cairns.*
e) *About 30 would work in a sales and administrative office in Cairns.*
f) *About 25 would be staff living on resort.*
g) *About 350 would be new residents or drawn from the Kuranda community currently working in Kuranda; leading to an expansion of population and a need for additional housing and facilities in Kuranda for approximately 700 additional population.*

The previous Table 11-87 estimates that KUR-World's employment will peak in 2027-28. The following Table 11-88 estimates total employment by years over the project period.

Table 11-88: Estimated operational employment by years over the project period, year ending March

Year	Est. (1) Average total	Est. Total incl. flow-on Type 1 Multiplier
Part 2018-19	80	103
2019-20	223	286
2020-21	329	422
2021-22	596	765
2022-23	639	820
2023-24	752	965
2024-25	1,011	1,297
2025-26	1,036	1,329
2026-27	1,149	1,474
2027-28	1,450	1,860

Flow-on jobs (Type 1 multiplier) in the Cairns region would increase in Table 11-88 to a total of 1,450 by about 410 when fully operational.

11.4.10.3 Combined construction and operational workforce

Table 11-89 below summarises the total construction and operational workforce by estimated location of workforce.

Table 11-89: Summary – KUR-World, total resort employment by estimated location

Year	Kuranda travel outside	Kuranda unemployed/ underemployed	Kuranda[23] new residents	On site	Tablelands Other	Cairns	Cairns Office	Total
2018/19	36	22	19	1	54	44	32	**208**
2019/20	64	49	73	4	153	145	35	**522**
2020/21	76	49	129	6	176	186	57	**677**
2021/22	117	73	192	10	247	214	42	**895**

[23] Construction workers are assumed to be temporary residents who will stay in temporary accommodation, caravan parks and the like

Year	Kurand a travel outside	Kuranda unemployed/ underemployed	Kuranda[23] new residents	On site	Tablelands Other	Cairns	Cairns Office	Total
2022/23	123	71	202	11	238	204	24	**874**
2023/24	136	81	229	13	297	282	16	**1055**
2024/25	168	100	279	17	377	347	20	**1308**
2025/26	171	101	283	17	310	264	23	**1169**
2026/27	186	111	272	20	300	279	35	**1202**
2027/28	224	128	346	25	342	355	30	**1450**
%	***13.9%***	***8.4%***	***21.6%***	***1.3%***	***26.6%***	***24.8%***	***3.3%***	***100.0%***
Note: This table does not include employment resulting from day and overnight visitors to Kuranda spending outside the resort.								

11.4.11 Impacts on Kuranda

11.4.11.1 Direct impacts on population and housing

From the preceding Section, it is estimated that the project operational period will create the following additional jobs for workers based in Kuranda which peaks at 350 (Table 11-90) at full operations.

Table 11-90: Estimated additional jobs in Kuranda

Year	New jobs involving additional workers based in Kuranda
2018/19	19
2019/20	74
2020/21	129
2021/22	194
2022/23	204
2023/24	232
2024/25	282
2025/26	286
2026/27	275
2027/28	350

Using a benchmark of two residents for each job, the estimated additional residential population (see Technical Note, Appendix 8B), generated by KUR-World can be compared with Kuranda's existing and likely future population is predicted at about 12.8% when the resort is at full capacity (Table 11-91 below).

Table 11-91: Estimated additional population and increase over the existing and likely future population without the project, Kuranda SA2 Area

Years	Estimated Additional population (No.)	Estimated Population without project [24] (No.)	*Percent Increase (%)*
2018/19	36	4,802	*0.7*
2019/20	148	48,74	*3.0*
2020/21	258	4,967	*5.2*
2021/22	358	5,021	*7.7*
2022/23	408	5,097	*8.0*
2023/24	464	5,173	*9.0*
2024/25	564	5,250	*10.7*

[24] Projected at average 1.5% per annum

Years	Estimated Additional population (No.)	Estimated Population without project [24] (No.)	*Percent Increase (%)*
2025/26	572	5,329	*10.7*
2026/27	550	5,409	*10.2*
2027/28	700	5,490	*12.8*

It is assumed that the construction workers will in large part take up temporary accommodation in the caravan park, dongas, etc. The number of additional dwellings required at a rate of one per 2.83 of population is estimated as follows for the operation workforce and temporary accommodation for construction workforce at one per worker (Table 11-92).

Table 11-92: Estimated additional dwellings needed, Kuranda SA2 Area

Years	Dwellings required	(Temporary dwellings)	Non-temporary dwellings	Additional non-temporary in each year
2018/19	13	(0)	13	13
2019/20	52	(20)	13	0
2020/21	91	(50)	41	28
2021/22	144	(50)	94	53
2022/23	164	(50)	114	20
2023/24	199	(50)	149	35
2024/25	202	(50)	152	3
2025/26	202	(50)	152	0
2026/27	194	(0)	194	42
2027/28	247	(0)	247	53

11.4.11.2 Secondary impacts on Kuranda

Secondary impacts on local business will come from different sources.

a) Construction Phase
   i. Spending by temporary construction work residents
b) Operational Phase
   i. Spending by resort overnight and day visitors outside the resort
   ii. Demand stimulated by resort employee local resident expenditure
   iii. Expenditure on additional dwellings needed by employees located in Kuranda.

Direct population impact on Kuranda has been estimated in the previous section. The impact of resultant household expenditure on Kuranda is estimated at approximately $20,000 per person based on ABS household expenditure data; reduced to allow for substantial leakage outside of the Kuranda area. The following Table 11-93 brings this information together to estimate total expenditure generated in Kuranda businesses.

Table 11-93: Estimated expenditure in Kuranda businesses

Years	Expenditure by day trippers	Expenditure by overnight visitors	Dwelling construction	Expenditure by additional permanent residents	Expenditure by additional temporary residents	Total
	$M	$M	$M	$M	$M	$M
2018/19	1.4	-	3.3	0.7	-	**5.4**
2019/20	3.2	0.2	9.8	3.0	0.4	**16.6**

Years	Expenditure by day trippers	Expenditure by overnight visitors	Dwelling construction	Expenditure by additional permanent residents	Expenditure by additional temporary residents	Total
	$M	$M	$M	$M	$M	$M
2020/21	3.9	0.5	9.8	5.2	1.0	**20.4**
2021/22	4.9	1.5	13.3	7.8	1.0	**28.5**
2022/23	5.3	1.5	5.0	8.2	1.0	**21.0**
2023/24	5.8	1.9	8.8	9.3	1.0	**26.8**
2024/25	6.5	3.1	0.7	11.3	1.0	**22.6**
2025/26	6.5	3.1	-	11.4	1.0	**22.0**
2026/27	6.5	3.4	-	11.0	-	**20.9**
2027/28	6.7	4.3	11.3	14.0	-	**36.3**

The following Table 11-94 estimates the impact of this expenditure on employment, based on input/output multipliers (see Technical Note, Appendix 8B).

Table 11-94: Estimated additional turnover and employment created in Kuranda businesses

Years	Turnover ($M)	Estimated direct employment (No.)
2018/19	$5.4	22
2019/20	$16.6	64
2020/21	$20.4	80
2021/22	$28.5	112
2022/23	$21.0	89
2023/24	$26.8	111
2024/25	$22.6	103
2025/26	$22.0	101
2026/27	$20.9	98
2027/28	$36.3	151

The estimated impact on population and housing is given in Table 11-95 below, based on 75% of jobs being filled by Kuranda residents.

Table 11-95: Estimated secondary impact on population and dwelling needs Kuranda

Years	Est. Additional Employment	Est. Additional Population	Est. Dwellings needed
2018/19	22	44	16
2019/20	64	128	45
2020/21	80	160	57
2021/22	112	224	79
2022/23	89	178	63
2023/24	111	222	78
2024/25	103	206	73
2025/26	101	202	71
2026/27	98	196	69
2018/19	151	302	107

11.4.11.3 Combined impacts on Kuranda

Based on the foregoing analysis, it is estimated in Table 11-96 that the project will have the following combined impacts on the Kuranda economy in terms of employment, population and housing when fully operational.

Table 11-96: Total additional impacts on Kuranda, 2027-28

Category	Directly related to resort activity	Secondary impact on Kuranda businesses	Total
Employment	350	151	**501**
Population	700	302	**1,002**
Additional dwellings needed	247	107	**354**

By 2027-28, the impact of the project on the Kuranda population (estimated by then to be about 5,490 without the project), is expected to result in an increase of 18% over the projected 2027-28 population without the project, and to require provision of an additional 354 dwellings (about 35 a year over the 10-year lead up period to full operations). This average of 35 dwellings a year translates into construction activity averaging of the order of $8.8M a year. This compares with average dwelling construction numbers in the Kuranda area over last five years of about 30 per annum. The dwelling construction rate in Kuranda could therefore be reasonably expected to approximately double over the 10 years project lead-in period.

11.4.11.4 Additional housing requirements and land availability

11.4.11.4.1 *Longer term housing need*

The estimated requirement for additional dwellings in Kuranda as a result of the KUR-World project is as follows in Table 11-97.

Table 11-97: Estimated additional demand for additional dwellings generated both directly and indirectly by KUR-World in the Kuranda area

Years	No.	Additional Required For that year
2018/19	29	29
2019/20	97	68
2020/21	148	51
2021/22	223	75
2022/23	227	4
2023/24	277	50
2024/25	280	3
2025/26	273	0
2026/27	263	0
2027/28	354	91

11.4.11.4.2 *Construction phase*

During the construction phase, it is estimated that temporary accommodation might be needed for workers as follows.

2018-19 0
2019-20 20
2020-21 50
2021-22 50
2022-23 50
2023-24 50
2024-25 50
2025-26 50
2026-27 0
2027-28 0

11.4.11.4.3 *Availability of allotments*

The Queensland Treasury report 'Residential Land Development Profile' for Mareeba LGA - July 2017 indicates a housing stock of 7,338 dwellings; with 7,056 at standard urban density and 282 rural density. The average of annual lot approvals 2007 to 2016 was 255, which indicates that there is an active development industry that can meet additional needs. Mareeba Shire Council has advised that the availability of land for dwellings in the Kuranda area is 264 lots (as per the following Figure 11-26).

While there would be sufficient availability of allotments to meet initial needs up to about 2020-21, given normal growth demands, additional subdivisions would need to be brought on line in the area to meet demand before 2023-24.

In summary, with regards to the projected demand generated for housing, there is adequate existing land zoned for home allotments to cater for initial phases of the project but there would be a need for additional zoned land to meet projected local demand for additional housing in the later stages of the project. It was reported that there is very little light industrial zoned land in Kuranda and if the project proceeds, there would be a need to attend to this.

11.4.11.4.4 *Short-term construction period needs*

It is estimated that any short-term temporary accommodation requirement for construction workforce dwellings in Kuranda over most of the construction period could be of the order of 50. Discussions in the real estate industry indicate that there is not currently a great deal of surplus capacity in the housing stock in the form of unoccupied dwellings. Preliminary consultation with real estate agents indicates a limited capacity at the caravan park and in available rental properties, indicating a need for attention by the project proponents to the accommodation of construction workers in close proximity to the site. A workforce focus group will be established prior to construction and a workforce accommodation strategy developed prior to construction. The workforce focus group will consist of local government and potential local accommodation providers. A strategy will be developed to ensure that local residents and businesses are given priority to the opportunities of providing short-term or temporary accommodation.

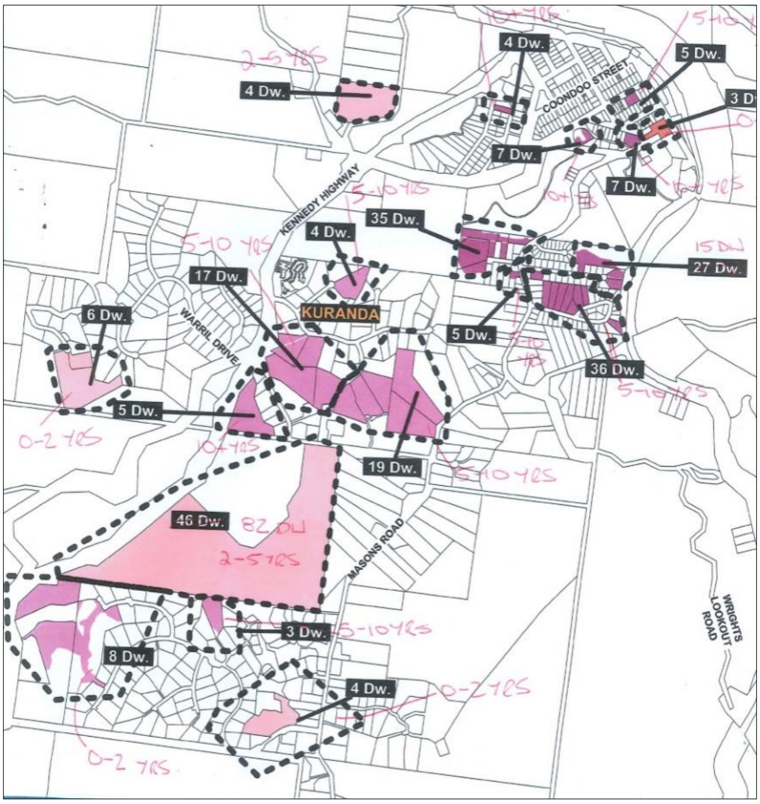

Figure 11-26: Land available for dwellings, Kuranda area

11.4.12 Tourism impacts

11.4.12.1 Accommodation sector

Projected growth (especially of the market out of China), will create a demand for a growth in product well in excess of the amount offered by the project. The following analysis in Table 11-98 indicates the degree to which KUR-World will impact on aspects of tourism in the region, beginning with accommodation.

Table 11-98: KUR-World accommodation development

Element	No.	
5-star resort hotel resort rooms	200	suites
4-star resort serviced apartments est. rooms	210	apartments
Lifestyle villas (farm stay)	56	villas
Premium villas	286	villas
Health & wellbeing suites	60	suites
Rainforest education	350	beds
University campus	300	beds
Glamping	25	tents
Queenslander houses	21	houses
Multi-unit dwellings	2	suites

The following Table 11-99 sets out the scale and growth of accommodation in the Cairns/Tropical North Queensland Tourism region in two types of accommodation – hotels & resorts and serviced apartments.

Table 11-99: Hotels and Resorts, Tropical North Queensland

Years	Average room Numbers	Room nights occupied ('000)	Occupancy Rate (%)
2005-06	4,281	1,023	65
2006-07	4,079	972	65
2007-08	4,251	958	62
2008-09	4,374	921	58
2009-10	4,439	919	57
2010-11	4,325	959	61
2011-12	4,035	944	64
2012-13	3,884	963	68
2013-14	3,891	979	69
2014-15	3,982	974	68
2015-16	3,980	1,010	69

Source: ABS Tourism Accommodation Series, 2006-07 to 2010-11.

It can be seen that the retreat of room occupancy rates after 2006-07 saw a reduction in the number of rooms in the period 2011-12 to 2012-13. The bounce-back in room nights since then has seen occupancy rates rise to 69% in 2015-16 (Refer to Table 11-100), with 2014-15 and 2015-16 September quarter occupancy rates were 78.9% and 76.3% respectively. Anecdotal information is that in the September quarter 2016, shortages of rooms were occurring in hotels in Cairns.

Table 11-100: Serviced apartments, Tropical North Queensland

Years	Average room (No)	Nights occupied (No. '000)	Occupancy Rate (%)
2005-06	3,428	764	61
2006-07	3,619	764	58
2007-08	3,775	773	56
2008-09	3,964	732	51
2009-10	4,123	738	49
2010-11	3,863	716	51
2011-12	3,740	709	52
2012-13	3,774	739	54
2013-14	3,996	810	55
2014-15	4,062	832	56
2015-16	3,933	871	60

Source: ABS Tourism Accommodation Series

Table 11-100 above indicates that there was strong growth in the number of serviced apartments from 2005-06 to 2010-11 but with declining room nights there was then a strong fall in occupancy rates to 2009-10. After 2010-11, the number of apartments fell (and tended to switch to residential). Since a low in room nights occupied in 2011-12, there has been a strong rise. When the two series are put together, serviced apartments have risen as a proportion of total from 46% to almost 50%.

Projected demand for hotel resort rooms and serviced apartment rooms detailed in Table 11-101 is based on an average increase over 10 years of 3.2% pa; with Chinese numbers growing at 15% a year up to 2021-22 and slowing after that to 5% a year.

Table 11-101: Projected need for hotel resort rooms and serviced apartments, TNQ Tourism Region

Years	Hotel & resort rooms	Serviced apartments	Total	Annual increase	Cumulative increase
2015-16	3,980	3,933	**7,913**		

Years	Hotel & resort rooms	Serviced apartments	Total	Annual increase	Cumulative increase
2016-17	4,135	4,086	**8,221**	308	308
2017-18	4,296	4,246	**8,542**	321	629
2018-19	4,464	4,411	**8,875**	336	962
2019-20	4,638	4,583	**9,221**	346	1,308
2020-21	4,819	4,762	**9,581**	360	1,668
2021-22	5,006	4,947	**9,953**	372	2,048
2022-23	5,146	5,086	**10,232**	279	2,319
2023-24	5,290	5,228	**10,518**	286	2,605
2024-25	5,438	5,374	**10,812**	294	2,899
2025-26	5,590	5,524	**11,114**	302	3,201
2026-27	5,747	5,679	**11,426**	312	3,513
2027-28	5,908	5,838	**11,746**	320	3,833

Source: ABS Tourism Accommodation Series

By the end of 2027-28, the additional rooms required regionally are expected to be 3,833; of which KUR-World could supply 200 rooms, 210 apartments and 342 villas. If it is assumed that houses and villas have the equivalent of two rooms, KUR-World's contribution would be 1,364, out of an estimated regional requirement of 3,800.

Therefore, the development of KUR-World would not oversupply the general regional hotel resort and serviced apartment market. Moreover, it would greatly stimulate the development of new tourism product across the Tablelands, which has languished following the development of Skyrail.

Finally, the timing of development at KUR-World can be varied to meet the market.

11.4.12.2 Impacts on tours and attractions

11.4.12.2.1 *Kuranda tourism*

Additional day visitor spending in existing tourism-oriented businesses in Kuranda is estimated to rise to the order of $11.0 million in 2027-28. Day tripper expenditure in existing Kuranda businesses is estimated to rise by the order of 16%.

11.4.12.2.2 *Tablelands tourism*

The location of a major accommodation establishment on the Tablelands, with regionally significant international visitor use, has long been a key ambition of the regional tourism sector and the wider community in Tropical Queensland. This is because it can be expected to have a significant positive impact on existing Tablelands tourism initiatives and businesses and to greatly stimulate the development of new product and attractions; adding a unique Tropical Australian Highland landscape to the Reef, Rainforest and Outback, as underpinning sub-regional destinations.

11.4.12.2.3 *Reef tourism*

It is expected most overnight visitors to KUR-World will also visit the reef. KUR-World is projected to add about 240,000 visitors to the reef by 2027-28, compared with about 1.1 million in 2016; estimated at overall projected growth of tourism to be approximately 1.6 million by 2027-28. When fully operational, overnight resort visitors are expected to contribute about 15% of reef trip traffic in the Cairns region. Expenditure per person is estimated to be of the order of $240 at current prices and therefore result in direct annual expenditure of the order of $58 million.

11.4.12.3 Impact on airport and market development

It is expected that almost all visitors staying at the resort will arrive and depart through Cairns airport. Visitors staying overnight (estimated to reach 240,000 by 2027-28) would represent a total of about 460,000 passenger movements a year - about 9% of current levels of approximately 5 million. At an aircraft size of 300 pax, this would represent about 30 movements a week - two arrivals and departures a day. Those visiting the resort as day trippers (estimated at 480,000 by 2027-28), would account for over eight movements a day four departures and arrivals.

The Cairns region has a major interest in sustaining direct flights from mainland Chinese cities and government assistance is being provided to support direct flights from December 2017. The KUR-World development has the potential to play a key role in consolidating the viability of those flights and the public investment made in attracting the flights.

11.4.13 Potential for business and supply chain opportunities

11.4.13.1 Construction phase

The supply capacity report by Thirkell Consulting Engineers, Appendix 10, points to substantial opportunities for the supply of construction materials and services from the Tablelands; including concrete, timber and light steel fabrication. It also points to a possibility of location of a plant to produce steel trusses and given a need to minimise transport on the Kuranda Range Road to locate on the Tablelands stock points from which supplies of materials and items brought up from the south via road transport and the Palmerston Highway can be supplied to the project.

11.4.13.2 Operational phase

The project will open up substantial opportunities for the region, with probably the most important at this point in time being to help consolidate the region's place in the Chinese market and opening-up the Tablelands as a key sub-regional destination to help counterbalance the potential for a decline in reef-related tourism should bleaching events continue.

Although at this stage, the project is modelled with all attractions and activities being conducted by direct employment, there is potential for different elements to be conducted on a buy-in, subcontract or lease basis by outside business providers.

A very significant range of opportunities will especially accrue to the Tablelands area. This will include the delivery of services which are currently undersupplied for Kuranda (banking, medical, childcare and aged care), and the supply of fresh produce and other services to the resort and residents; including the development of collateral tourism product and attractions.

11.4.13.3 Potential for direct equity investment

KUR-World will provide an opportunity for direct investment in property sales with a total estimated value of $448 million and in Lifestyle Villas, 4-star Serviced Apartments and Premium Villas with a total value estimated at about $328 million.

11.4.14 Wider effects on the Queensland and national economies

11.4.14.1 Strengthening the Queensland regional economy

The Cairns region plays an important role in the wider Queensland economy; especially in making it Australia's most decentralised state.

Outside of Queensland's south-east, the Cairns Tropical North Queensland region:

- Has the largest population and has consistently recorded the highest level of growth of population, both residential and total including visitors

- Leads in tourism development, especially in international tourism. In holiday international visitors, it exceeds the States of Western Australia and South Australia
- Is the leading agricultural region in the North, especially in horticultural production supporting a great deal of road transport services to and from southern Australia
- Is the leading aviation servicing centre with Cairns airport dominating passenger movements and international air links in northern Australia
- Is the leading maritime servicing centre with three operational shipyards servicing a large tourism fleet, trading fleet, fishing fleet and Australia's north eastern naval base.

Strengthening the region's economy therefore has strong additional flow-on effects to other regions right up and down the Queensland coast with much of the regional impact being on Brisbane and south-east Queensland, as a supplier of many manufactured goods and of business and government services.

11.4.14.2 Impact on the Queensland economy

Impacts on the Cairns regional economy's Gross Regional Product including Type 1 flow-on effects over the 10 lead-in years are estimated to total about $2.4 billion and be contributing, once fully operational in 2027-28, in the order of $350 million a year. Regional employment generated during the build-up is estimated to total of the order of 24,000 job years and when fully operational in 2027-28 in the order of 3,542 jobs in the region.

Queensland-wide impacts would be substantially higher than this because of flow-on effects to regions down the coast and to Brisbane and the south-east corner. Addition to Queensland State Product (currently at about $320 billion a year), could be expected to be up around an order of magnitude figure of $400 million a year and employment generated including "flow-on" could be expected to be around an order of magnitude figure in the State of about 4000 a year.

11.4.14.3 Contribution to state government budget

In 2015-16 (ABS Cat No. 5506.0), the State governments' direct revenue was $79.1 billion, plus income from the goods and services tax of $98.3 billion, representing a total of approximately $16,500 per person employed of 10.7 million.

Translating this through to the estimated employment generated by KUR-World, including Type 1 flow-on effects, gives estimated taxation revenue that could be expected to accrue to the State Government (when the project is fully operational) of about $66 million per annum. In the first 10-year period, taxation revenue generated for the State Government is therefore estimated to be up over $300 million and in the first ten years of full operation around $600 million.

11.4.14.4 Impact on Queensland's tourism

Queensland has different focal points for international holiday visitors, especially Gold Coast, Cairns and Brisbane; each with an airport serviced by direct flights from overseas. Queensland comes in second to New South Wales in international holiday visitors, this extends to the major current international growth market of China (Table 11-102).

Table 11-102: Holiday visitors from China, 2016-17

Visitor Destination	Visitors	Total Visitors
New South Wales		**440,000**
Queensland		**358,000**
Gold Coast	256,000	

Visitor Destination	Visitors	Total Visitors
Cains/TNQ	189,000	
Brisbane	149,000	
Victoria		**345,000**

Source: Tourism Research Australia, International Visitor Survey (IVS).

In 2016-17, some 189,000 (53%) of Queensland holiday visitors from China visited the Cairns/Tropical North Queensland region. The establishment of KUR-World has the potential to consolidate Queensland's position in Australia's international holiday markets, especially in the major Chinese growth market, and help it become the leading State in Australia for Chinese holiday visitors.

11.4.14.5 Impact on national tourism

The Cairns/Tropical North Queensland region plays a very important role in helping to spread tourism around Australia, distributing international visitors away from its south-east corner.

Table 11-103: Proportion of international visitors who also visit the Cairns Region

Visitor Destination	Percent (%)
Central Queensland	62%
Whitsundays	68%
Townsville	76%
Darwin	35%
Red Centre (Lasseter)	54%

Source: Tourism Research Australia, International Visitor Survey (IVS).

Table 11-103 above illustrates the positive impact of the Cairns Region in spreading visitors across the country, especially throughout regional Queensland, the Red Centre and Top End. The KUR-World project could help to consolidate this.

11.4.14.6 Strengthening economic and social relationships with China

Alongside north Queensland's other communities, Chinese immigrants once played a strong role in the development of the Tropical North Queensland region, with the celebration of Chinese New Year long being part of Cairns City's social calendar. The KUR-World project has the potential to play a special role in diversifying Australia's growing economic engagement with China, especially in developing people to people contact through tourism that could help foster better understanding and amiable relations.

11.4.15 Health and wellbeing

11.4.15.1 Overall impacts

The project is expected to progressively add over a nine-year period, a number of new dimensions to the Kuranda community.

1) A major increase in day trippers to the area at an average of about 1400 a day representing about a 50% increase by 2027-28.
2) A major increase in overnight stay visitors over the nine-year period to about an average of 2,000 in 2027-28 compared with about 300 recorded in the 2016 Census with many coming from Asian and other international countries.
3) Over the nine-year period, a substantial increase in employment located in the Kuranda area – more than a doubling.
4) When account is taken of workers switching to local employment from commuting outside the Kuranda area to work, reduction in unemployment and under employment, a modest increase in population over the nine-year period by about 13%.

The following assesses how these changes are likely to impact on community health and wellbeing.

11.4.15.2 Day trippers

The Kuranda community is already well adjusted to coping with large numbers of day trippers who tend to be concentrated in the township area and specific locations and are well separated from the residential population.

The KUR-World project will continue this pattern with facilities contained in a limited area and separated from residential and trade/business locations.

Day trippers are mainly in the area over a concentrated period from about 10am to 3pm and do not create a large demand for social facilities like hospitals, emergency services, police and education. There are already substantial problems with parking congestion in the main village day tripper area and KUR-World will be able to help the area cater for a large increase in day trippers without the costs of expanding public facilities that are partly financed by a levy on passengers on the train and Skyrail.

11.4.15.3 Overnight visitors

Most of the overnight visitor activities will be either contained within the resort or on day trips away from Kuranda. They will, however, represent some increase in business for the village centre attractions and potentially other attractions outside the resort in the Kuranda area. This is likely to include a demand for an extension of business hours and additional hospitality services in Kuranda township that will increase profitability and viability.

There is likely to be a high proportion of Asian visitors among the overnight visitors using the town tourism attractions. However, because the existing day tripper business includes a high proportion of international traffic, the community is familiar with international visitors and the proposed development represents an adjustment in numbers rather than a major new experience.

The proposed development will have strong environmental, rural, health and wellbeing themes which is consistent with Kuranda's existing atmosphere. The resort will also have its own medical facilities and recreation facilities which have the potential to add to those available in the Kuranda area.

The resort overnight population will not be drawing on local education facilities.

It will have strong internal security arrangements. Although numbers will be large of up to 2,000 at any time, it can be expected that they will only increase demand marginally for law and order facilities.

There may be a need to expand emergency services to cope with the larger number of buildings in the area and population. Requirements for expansion of utility services like electricity, water and waste are dealt with elsewhere.

11.4.15.4 Expanded workforce.

KUR-World offers outstanding opportunities to assist Kuranda's social demographics and local employment opportunities. Kuranda has an ageing community profile that goes back in part to a strong youth alternative lifestyle inward movement in the late 1960s, 1970s and 1980s period. Major local job opportunities as a result of the resort development for younger and family age workers will help redress that imbalance and make Kuranda a more balanced community.

The KUR-World development will offer a major opportunity for many currently obliged to commute away from the community for work to find local employment.

KUR-World will especially provide opportunities for unemployed and provide opportunities for under employed through part-time work and will especially provide opportunities for work for the relatively high Indigenous population in the area.

11.4.15.5 Additional residential population

The KUR-World development will result in an increase in local jobs over a nine-year period, however, it is likely that the resulting increase in local residential population will be modest. This is because over half of local workers currently commute outside Kuranda and the increase in jobs created by the proposed development is smaller when compared with the current workforce residing in the area.

It is expected that a substantial part of the employment requirements can be met from this large pool of Kuranda residents who commute to Cairns and elsewhere switching to local employment which will not result in an increase in residential population. The opportunity to draw on currently unemployed, especially local Indigenous people will be the focus of the proposed development. It will also require substantial part-time employment that can potentially be met by currently under-employed in the existing population.

A proportion of the workforce will also be drawn from Cairns and elsewhere on the Tablelands.

Kuranda already exhibits a steady underlying growth rate and the resort coming on top of this will mean that it can be expected that Kuranda will experience an increased residential population growth rate of about 2.5% per annum over the next 10 years from about 4,800 to 6,200 or about 29%. As recorded above, one of the benefits from this expansion will be that most of the increase could be expected to be in younger and family age groups leading to a more balanced community.

Although the additional workforce and population might have some Asian/Chinese component for language reasons, it is likely that the great bulk of the additional residents would have fairly typical Australian origins and pose few difficulties of adjustment into the existing community. Notwithstanding this, there would however, be some need for expansion of social infrastructure over the nine-year project development period including health facilities (the resort itself would help with this), law and order, education and child care.

In relation to education, the current pattern of many parents commuting to work outside Kuranda leads to placement of children in schools outside the Kuranda area, weakening the strength of local education delivery. Reduction of commuting and additional residential population was raised in the public consultation process as a positive for the strengthening of the standard of local education development.

In relation to transport services, the size of the community will still be such that most will use their own transport, and public services may not be viable. However, there is likely to be a need for transport services for overnight visitors from the resort to Kuranda township including increased taxi availability. As set out in a previous section, there is likely to be a small residential population located in the resort area but this is likely to be of a type that would not interact greatly with the general community.

11.4.16 Overall observations

***Employment**:* In summary, 970 Full-Time Equivalent (FTE) jobs are predicted to be created by the project in the year 2027-2028 and beyond. This equates to in the order of 1,450 Full-Time and Part-Time jobs and with Type 1 flow-on effects will generate in the order of an additional 410 Full-Time and Part-Time jobs in the Cairns Region, generated through expenditure at KUR-World.

Currently, Kuranda has a higher proportion of part time work and unemployed people than wider Queensland. The Indigenous population in the Kuranda area in the 2016 Census was 517, around 11.5% of the population with very high Indigenous unemployment rate and a low workforce participation rate, compared to the non-Indigenous community. Barriers to employment include overcrowding, poverty and inter-generational welfare dependency.

Tourism: KUR-World has the potential to help reinvigorate tourism on the wider Tablelands region and restore activity to former levels, bolstering the Tablelands as a keystone destination for visitors to Far North Queensland.

Housing*:* While median rents in the Kuranda area are relatively low (although this could have been partly affected by very low rents for Indigenous housing), with the proportion with rents over 30% of income low (at 8%) compared with the Queensland proportion of 11.5%. The indications of rental stress are also low compared with the regional and State averages. Thus, the numbers who would be exposed to difficulties if there was a substantial rise in rentals is not large but more likely to be from the Indigenous community. A detailed accommodation/housing strategy prior to construction is proposed prior to construction to ensure the most current data is used in the analysis and mitigation strategy. A workforce focus group will be established to address housing requirements during and post-construction. The workforce focus group will consist of local government and potential local accommodation providers. A strategy will be developed to ensure that local residents and businesses are given priority to the opportunities of providing both short-term and long-term accommodation.

Services: According to the Census data of 2016, most Kuranda residents (59%) work outside Kuranda, these and most Kuranda residents (with the exception of Indigenous residents) rely on services outside Kuranda to fulfil some needs (e.g. banking and health).

Stakeholder Concerns and Mitigation Strategies: The most significant concerns expressed in the stakeholder survey were:

- Protection of endangered species
- Pesticides and fertilisers from golf course reaching the reef
- Jobs offered to locals
- Sediment and erosion measures
- Water supply

All comments, feedback, suggestions and issues raised by the community were assessed by the stakeholder engagement team. Issues that required feedback were answered in a timely manner and all issues that were identified as important matters for the community (e.g. protection of endangered species, water quality, job opportunities), were discussed in formal meetings.

Design Refinement: The master plan, infrastructure requirements and/or environmental monitoring and management plans have been modified and updated iteratively to address these concerns and provided publicly through a number of mechanisms for all stakeholders (refer chapter 4, table 4-1). These issues were also discussed within the Community Reference Group meetings where the project team presented findings of the studies, clarified misunderstandings, showed changes/updates to the master plan and discussed potential strategies to avoid and/or mitigate any potential impacts (refer chapter 4, table 4-1). Feedback received from all the stakeholder engagement strategies has been considered to develop the master plan and avoid/mitigate any potential impacts (refer chapter 4, table 4-1). For further information regarding these strategies refer to Chapter 21 (Environmental Monitoring and Management Plan).