

Towards Tourism 2032

ANNUAL SCORECARD REPORT

November 2023

ECONOMIC MEASURES

- ◆ **TOTAL OVERNIGHT VISITOR EXPENDITURE (OVE)** increased to **\$33.2B** (YE June 2023) – up from \$20.4B (YE June 2022)
- ◆ **TOTAL TOURISM GROSS STATE PRODUCT (GSP)** increased to **\$21.5B** (FY 2021–22) – up from \$15.7B (FY 2020–21)
- ◆ **TOTAL TOURISM GROSS REGIONAL PRODUCT (GRP)** increased in **11 of 11 regions** (YE June 2022)
- ◆ **BEST OF QUEENSLAND EXPERIENCES (BOQE)** declined by **4.3%¹** to 2,130 (2022 vs 2023)
- ◆ **RETURN VISITATION TO QUEENSLAND at 88%²** (June 2023) – down from 93% (June 2021)

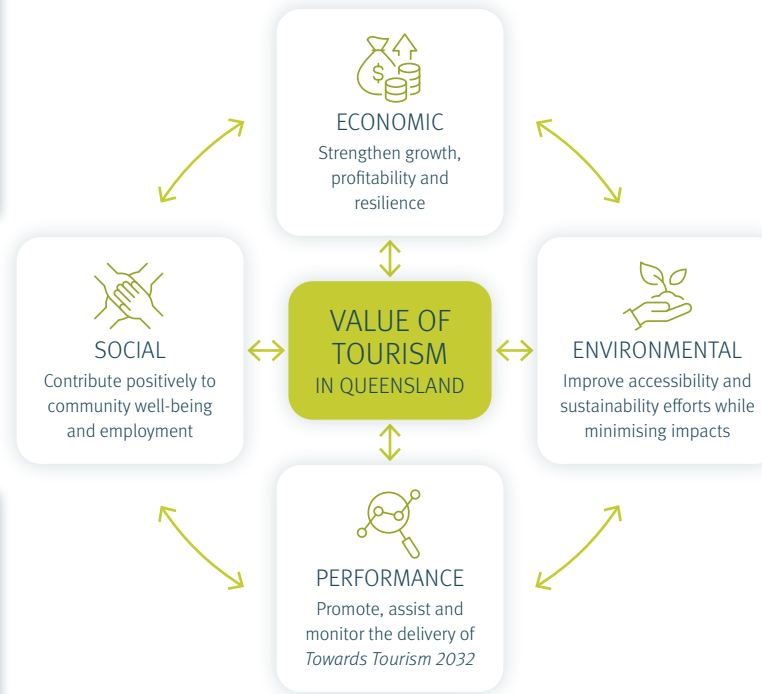
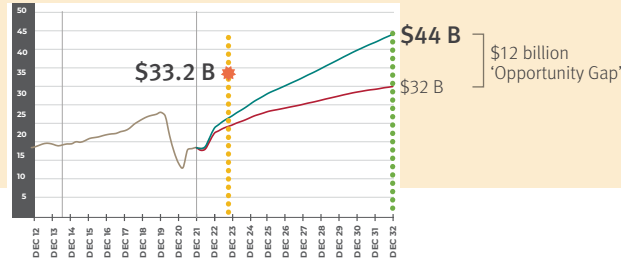
Many people in the community support tourism, but there has been a slight decrease. It's important to involve the community in tourism decisions and keep their approval. The decrease in support is probably due to the lasting effects of COVID recovery and the influence of underlying regional social and economic pressures impacting this reporting round.

SOCIAL MEASURES

- ◆ **81% COMMUNITIES SUPPORTIVE OF TOURISM** (2023) – down from 84% (2021)
- ◆ **14% agree POSITIVE IMPACT ON QUALITY OF LIFE** (2023) – remains stable (2021)
- ◆ **37% agree POSITIVE IMPACT ON COMMUNITY** (2023) – down from 41% (2021)
- ◆ **53% SUPPORT CONTINUED TOURISM GROWTH** (2023) – slightly down from 55% (2021)
- ◆ **206,200 QLD TOURISM JOBS** (FY 2021–22) – up 32% (FY 2020–21)

- ◆ Current data above baseline figure
- ◆ Negligible difference between current data and baseline figure
- ◆ Current data below baseline figure

OVE growth is strong (particularly domestic); however, **softening in demand is expected; regional disparity remains; and international visitation remains lower than pre-COVID.**



Tourism remains a key employer – **1 in 15** Queenslanders.

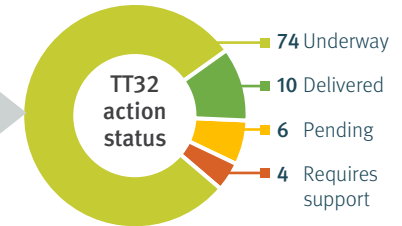
Continued growth of accommodation and air seats is needed to keep pace nationally and meet 2032 targets.

Visitors now have higher expectations for sustainability and accessibility to be integrated into business operations. Certification or accreditation can help showcase best practice.

ENVIRONMENTAL MEASURES

- ◆ **243 ECO-CERTIFIED TOURISM OPERATORS** (Oct 23) – up from 227 operators (April 23)
- ◆ **2 ECO-CERTIFIED TOURISM DESTINATIONS in QLD** – 1 eco-certified tourism destination in Queensland (2022)
- ◆ **6.05M NATIONAL PARK VISITS** (YE June 2023) - increased by 171k visits (YE Sep 22)
- ◆ **2,985 OPERATORS CATERING FOR ACCESS NEEDS** (Sep 23) – up from to 1,738 operators (Sep 22)
- ◆ **543 OPERATORS PARTICIPATING IN ACCREDITATION PROGRAM³** (2023) – down from 580 operators (2022)

Meaningful progress on TT32 actions – partnership effort required to fully deliver Phase 1 in 2025.



PERFORMANCE MEASURES

- ◆ **0 TT32 Phase 1 DEMAND ACTIONS** delivered
- ◆ **1 TT32 Phase 1 SUPPLY ACTIONS** delivered
- ◆ **0 TT32 Phase 1 CONNECTIVITY ACTIONS** delivered
- ◆ **6 TT32 Phase 1 CATALYST ACTIONS** delivered
- ◆ **3 TT32 Phase 1 ENABLER ACTIONS** delivered
- ◆ **90,470 ACCOMMODATION ROOMS in QLD** (YE June 2023) – grew by 2,054 rooms (June 22)
- ◆ **26.5M AIR SUPPLY (SEATS) to QLD** (YE Dec 2023) – 95.4% of YE Dec 2019 levels

Towards Tourism 2032 (TT32) builds on the intent and directions of the Independent Tourism Industry Reference Panel's *Action Plan for Tourism Recovery*. Queensland Government has invested almost \$260 million in initiatives to-date linked to implementing TT32 Phase 1 - on track to exceed the Panel's advice to establish new experience, infrastructure, and event funding streams of \$270 million over the life of TT32.

¹ Decline in operators achieving BOQE status likely due to business consolidation of ATDW listings post-COVID.

² Marginal decline in repeat leisure visitors to Queensland after surge in first time visitors.

³ Decline in operators obtaining accreditation under a TEQ recognised program likely after business consolidation and change in methodology of ATDW listings post-COVID.

Towards Tourism 2032

WHY A BALANCED SCORECARD?

The Balanced Scorecard approach used in *Towards Tourism 2032* offers an opportunity to acknowledge the significance of economic, social, cultural, environmental, and visitor experience results in shaping Queensland's future in tourism. Interpreting the data from this scorecard can help tourism businesses and the larger industry spot new trends and growth prospects, adjust their business methods, and plan ahead with assurance.



For more information, visit:
www.dtis.qld.gov.au/tourism/tourism-strategy/towards-tourism-2032