

28 June 2021

Ms Liz Savage  
Chair  
Tourism Industry Reference Panel  
E: [tourismrecovery@dtis.qld.gov.au](mailto:tourismrecovery@dtis.qld.gov.au)

Dear Chair

Brisbane Economic Development Agency (Brisbane EDA) welcomes the opportunity to respond to the Queensland Government-backed Tourism Industry Reference Panel and your recent call for industry input to the Action Plan for Tourism Recovery, *Designing our Tourism Future – May 2021*.

Brisbane EDA is a wholly owned subsidiary of Brisbane City Council (BCC) and acts as an independent agency whose remit is to help grow Brisbane's economy, drive demand for Brisbane, and create growth and trade opportunities for local Brisbane businesses. By doing this, Brisbane EDA contributes to the long-term economic growth of the city with a better quality of life for Brisbane residents.

Brisbane EDA has played an important role in driving Brisbane's economic recovery from COVID-19, working with industry leaders, business partners, and local businesses to deliver initiatives with immediate and sustainable economic impact for Brisbane. We are focused on delivering a series of high-impact economic growth initiatives that will reinvigorate sectors, create employment opportunities, and raise living standards for the people of Brisbane.

The current economic environment provides a rare opportunity to recognise the role that Brisbane can play as a major port and airport hub to service the Asia Pacific region, and wider destinations. Brisbane EDA's response supports the proposition that the solutions and opportunities to drive sustainable growth in the visitor economy will need to be led by industry and enabled by all levels of government.

Brisbane is experiencing a once-in-a generation transformation of the visitor economy with more than \$14 billion of new projects delivered or underway. No other capital city in Australia is better positioned to help the nation to drive domestic and international visitation as we move into our post-COVID recovery stage. The potential exists to further leverage this investment with new projects and significant infrastructure to support the proposal to host the 2032 Olympic and Paralympic Games, which will position Brisbane for exponential growth in international markets for decades to come.

We have provided our response to several of the questions posed in the discussion paper in detail over the next few pages. We have also enclosed our *Visitor Economy 2031: Vision for the Brisbane Region (VE2031)* report. Launched in September 2019, *VE2031* clearly outlines what is needed for Brisbane to secure an additional \$6.5 billion in visitor expenditure per annum by 2031 above the forecast growth. Despite the challenges of COVID-19, the vision for Brisbane outlined in *VE2031* of "enhancing the contribution of the visitor economy to the region's lifestyle, environment and economy through capturing greater value for our communities and sustainably managing growth" remains true and forms the basis on which much of our solutions and insights for the discussion paper are drawn. A Brisbane Capital City Visitor Economy Strategy, developed in partnership between the City and the State, is proposed as the vehicle to drive this opportunity forward for the benefit of all of Queensland.

We welcome the opportunity to be contacted should the Tourism Industry Reference Panel require any further detail on our submission.

Yours sincerely



Brett Fraser  
Chief Executive Officer

## 1. WHAT COULD BE DONE AT A LOCAL LEVEL TO INCREASE THE BENEFITS OF TOURISM?

### Enabling Infrastructure Investment

Increasing dispersal of visitors across South East Queensland and throughout Queensland is essential if average length of stay and visitor expenditure are to increase. In 2020 Brisbane Airport's parallel runway and the Brisbane International Cruise Terminal both opened. Driving direct international routes and additional airline and cruise capacity is essential to recovery and growth of the visitor economy. Enabling infrastructure to connect to the airport and cruise terminals with Brisbane City, bay, river, and hinterland is also vital.

The aspirations outlined in the *SEQ City Deal* to deliver a 45-minute region applies equally to the visitor economy and the commuter. Ensuring the region has the transport infrastructure and event venues required to support the major events strategy, delivery of the 2032 Olympic Games (if Brisbane is successful) and providing the required connectivity to the region's visitor attractions and infrastructure is critical.

The *Brisbane's Built Visitor Attraction Study 2021*, commissioned by Brisbane EDA and the Department of Tourism, Innovation and Sport (DTIS) and undertaken by AECOM and AEC, found that significant barriers in attracting new commissionable tourist attractions exist, some of which include:

- High upfront capital investment costs for land, building construction and supporting infrastructure;
- Availability and cost of land including where highest best use is not conducive to building tourism attractions;
- Availability and cost of government land based on policies requiring the value of land to be based on highest and best use;
- Constrained access to capital when compared to other sectors; and
- Highly sensitive seasonal and unreliable investment returns compared to other asset classes.

Brisbane currently has an immediate, once-in-a-generation opportunity to embed commissionable tourism attractions of scale into a range of inner-city urban renewal precincts (e.g., Cross River Rail sites, Northshore, Queensland Rail etc) that are currently being developed across the city. Despite these attractions inability to compete on land pricing with residential or commercial developments, they can significantly boost visitation while diversifying and enlivening their precincts, which the report shows can provide lasting employment and overall economic benefits. Current policies previously noted prevent this.

Brisbane's enviable response to the COVID-19 pandemic has elevated its position worldwide and is now a preferred destination for a number of fully funded major tourist attraction operators. However, land supply for these operators who want to create a brand-new offer to help re-invigorate the overall visitor economy in a post COVID-19 landscape is the last major obstacle preventing these new attractions from calling Brisbane home.

### Regulatory Environment

A wide range of regulatory and legislative regulations govern development in protected and natural areas. Protection of our most precious natural environments is obviously essential, however the complexity of approval processes in coastal and hinterland locations has been a major hurdle in attracting new tourism investment and experiences to market. Collaboration with Federal and State Government departments and management agencies is essential to review policy barriers and identify opportunities for streamlining development processes in natural areas.

Community support and a social licence for tourism are also increasingly important considerations, particularly as visitor volumes and interest in natural experiences grow. Effective strategic planning requires engagement with communities at an early stage in overall business planning – gaining consensus, securing

support, encouraging engagement, and building awareness of the economic and social benefits of sensitive tourism development.

### Service Focus

For destinations and products to capture a share of the domestic market and to ensure service-readiness for the international market, the rollout of service programs such as 'Aussie Hosts' will support workers to deliver the quality required to maximise visitor yield and satisfaction, and help operators attract and retain international holiday makers for longer in Queensland.

### Rebuild Brisbane and Queensland's International Student Market

Trade and Investment Queensland's (TIQ), *International Education and Training Strategy to Advance Queensland 2016-2026*, strategy identifies this sector as Queensland's second biggest service export. International Education is a high value market to Queensland's Visitor Economy. International students deliver significant length of stay, high spend and drive visiting friends and relatives (VFR), in addition to providing a short-term workforce. Education visitors have the longest average stay in Brisbane accounting for only 4% of visitors but 18% of overall visitor nights (*Visitor Economy 2031*).

Targeted investment to rebuild a strong and sustainable international education market is vital to ensure Queensland maximises the range of benefits delivered through this industry including economic benefits, skilled workers, strengthening of global business networks in addition to enriching communities. As the Capital City and home to around 67% of all international students to Queensland, Brisbane has a significant role to play in the recovery of this market.

### **Recommendations**

- **Undertake a gap analysis of key transport and events infrastructure for the visitor economy in SEQ and implement the findings to easily connect the key precincts for visitors in Brisbane and South East Queensland and in preparation of a potential 2032 Olympics.**
- **Investigate State-owned inner-city precincts for tourism usage to reduce land valuation and encourage tourism investment.**
- **State Government departments and management agencies to review policy barriers and identify opportunities for streamlining development processes in natural areas for new nature-based experiences.**
- **State-wide customer service program rollout.**
- **Rebuild a competitive position for Brisbane and Queensland as a top international student destination to counter the growing COVID-19 trend of remote learning, online learning and short course/micro-credentials.**

## 2. WHAT DO YOU SEE AS THE OBSTACLES TO PROGRESS?

### Structure

In recent years, several industry forums and consultation processes have identified structural inefficiencies of tourism industry organisations, and funding uncertainty for collaborative initiatives as matters of major concern. Remedies for these issues have been canvassed over many years and numerous reform proposals have been contemplated in the past, but they have not achieved sufficient success or have never been implemented.

As the capital city of Queensland, Brisbane is often at odds with many aspects of the Regional Tourism Network and in particular, the objectives of its LGA partners within the Brisbane remit. To drive visitor economy outcomes that benefit both Brisbane and Queensland, Brisbane needs to focus on the highest impact priorities, many of which are outlined in this document, including:

- International aviation route development;
- Global product and experience readiness;
- Domestic and international marketing; and
- Large-scale tourism infrastructure investment.

As a potential Olympic city in 2032, Brisbane needs to build its global proposition with a clearly defined Capital City narrative that is embraced, supported, and promoted by all stakeholders. As a standalone RTO, Brisbane would be more effective in driving strong outcomes that would benefit both the capital and whole of Queensland.

### Workforce shortages

In the short term, extension of government grant programs as seen for farm workers (e.g., Pacific Islands), into the tourism industry should be implemented.

It is also essential to support the return of international students, a key visitor market for Brisbane and the wider regions. Not only are international students a valuable source of expenditure (direct and city and VFR) they also play a key role in providing a target workforce market, as well as contributing to the innovation ecosystem and driving future growth potential.

### Tourism as a Lifelong Career

Longer term, development of a tourism workforce plan, strengthening industry pathways for students, building capability for tourism businesses, and the rollout of customer services programs such as *Aussie Hosts* will support workers to deliver the quality required to maximise visitor yield and satisfaction. Employers are facing a challenge to their employment requirements and need to focus on work-life balance opportunities and a greater commitment to career pathways for employees.

### Quality Data

Data drives industry, business and government decision making. The lack of quality data currently available in the industry creates difficulties for businesses, investors, and marketing organisations. Whilst data solutions are in place in some agencies (e.g., TEQ's arrangement with Dspark), contractual arrangements often preclude sharing of data at an RTO and LGA level.

Integration of big data from multiple sources that complement and enrich best practice visitor survey methods is needed. The scope of Australia's overseas arrivals and departures data collected by the Australian Bureau of Statistics and analysed by Tourism Research Australia, including the international (IVS) and national visitor survey (NVS), also needs to be broadened.

Current tourism and visitor data fails to provide reliable and timely information at the regional and local level. Integration of new digital and big data is now needed to broaden the scope and coverage of the national data sets. The lack of timely and quality data on visitation, visitor sentiment, and spending creates uncertainty for investors and operators and marketing organisations. The big data landscape is growing rapidly, and this provides significant potential to segment the sources from booking websites, credit cards and mobile phone data.

### **Recommendations**

- **Establish an industry structure to maximise efficiencies across the State, rejuvenate the competitiveness of the tourism industry and maximise the return on marketing investment, including a standalone Brisbane RTO.**
- **Work with Federal Government to deliver more seamless and internationally competitive visa entry conditions, fee structures, visa processing and entry experiences for international visitors and key workers, including a US Customs Pre-Clearance facility.**
- **Address the challenge that tourism is not widely seen as an attractive career option.**
- **Enhance the national and international visitor surveys and complement them by investing in robust aggregated and segmented data capability.**

### 3. WHAT SHOULD QUEENSLAND BE DOING TO RE-SET, TRANSFORM AND EMBRACE THE OPPORTUNITIES A POST COVID-19 WORLD PRESENTS?

#### Capital City Visitor Economy Strategy

Over \$14 billion of projects have been completed or are currently underway, including: a second runway at Brisbane Airport; a new international cruise terminal; numerous new hotels; and transport infrastructure that supports connectivity across the city. This investment has been a catalyst in the development of the *Visitor Economy 2031: Vision for the Brisbane Region (VE2031)* which clearly outlines what the destination needs to deliver to secure an additional \$6.5 billion per annum above forecast growth by 2031.

The rise in tourism infrastructure directly corresponded with rising visitor numbers, with the region reporting 22 quarters of unprecedented visitor growth up to December 2019 (pre-COVID). The existing and forecast infrastructure, along with increasing global recognition and appeal, sees Brisbane ideally placed to lead recovery post-COVID with appropriate levels of support.

From a visitor economy perspective, pre-COVID, Brisbane was:

- Queensland's largest visitor market at 32% of the State.\*
- Queensland's highest performing region over the last four years with over 10% average annual growth.\*
- Queensland's number one holiday destination in terms of number of visitors.\*
- Queensland's primary gateway to the world with connection to 34 international ports.
- Queensland's highest contributor of Gross Value Added and Gross Regional Product attributed to the tourism industry at 36%.#
- Queensland highest contributor of employment attributed to the tourism industry at 33%.#

\*IVS and NVS year ending December 2019

#Tourism Satellite Account 2018/2019

As the capital, Brisbane's role in the visitor economy is different to that of most other regions. Brisbane needs to focus on high-impact priorities, many of which are outlined in this document and include:

- International aviation route development;
- Global product and experience readiness;
- Domestic and international marketing; and
- Large-scale tourism infrastructure investment.

Successful delivery of these initiatives will benefit both Brisbane and Queensland.

Furthermore, as a potential Olympic city, Brisbane needs to build its global proposition with a clearly defined Capital City narrative that is embraced, supported and articulated by all stakeholders.

As such, a Capital City Visitor Economy Strategy agreed between city and state, is the vehicle to drive these priorities forward for the benefit of all of Queensland.

#### Strategic Projects to Increase Queensland's Market Share

Projects such as the, *Advance Queensland: Connecting with Asia Strategy* which saw a State Government funding commitment of \$30 million over four years, brought together multiple destinations to work collaboratively to increase Queensland's market share in Asia. Significant projects where Queensland destinations work collaboratively to drive visitor demand are required to ensure Queensland regains global market share. With aviation a key factor in Queensland's ability to be globally competitive, collaboration between destinations, including airports, will serve to increase competitiveness of the destinations and drive greater visitor expenditure through increased length of stay within the state.

### Aviation Route Development

Brisbane Airport Corporation's significant investment into building a second runway is a key enabler for international growth not only for Brisbane and Queensland, but also other Australian states. This combined with significant new infrastructure investment positions Brisbane as an ideal entry point to Australia for international visitors.

As the key gateway to Queensland, Brisbane Airport connected with 34 international ports pre-COVID-19, and with its strong domestic connectivity provided unrivalled dispersal across Queensland. The recovery of the international visitor market to Queensland requires a long-term approach to aviation support, focussing on Brisbane as a key to re-establishing the international network for the whole of State. The success of international aviation attraction would be significantly enhanced with Brisbane being acknowledged as an internationally recognised Capital City. To deliver this, additional marketing support that prioritises the Capital City at a State level is required.

VE2031 predicts growth from China and India to account for 78% of additional international flights. However, due to post-COVID-19 global uncertainties, significant investment into new international aviation route development is critical to attract alternative pathways and additional airline capacity, along with a strong commitment to cementing Brisbane Airport as Queensland's priority international airport.

### Business Event Bid Fund Programs

Business events are the most lucrative part of the visitor economy, with conference attendees spending 77% more per day than leisure tourists. The Queensland Government's Acquisition and Leveraging Fund (ALF), established in 2011 and administered via Tourism and Events Queensland (TEQ), has been instrumental in Queensland destinations winning international business events. In response to COVID-19, TEQ also established a National Business Events Program (NBEP), assisting Queensland destinations to secure 19 business events.

The current understanding is that TEQ will extend both the ALF and the NBEP for an additional year, taking the programs to 30 June 2022. As borders open, domestic and international competition for this strategic and high-yield visitor market will only increase. Queensland destinations need certainty around the ongoing nature of the ALF and NBEP to capitalise and plan for opportunities beyond the current one-year term.

### Grow Indigenous Businesses

Brisbane's Indigenous tourism offering is ever-increasing and the market appeal for authentic cultural tourism experiences continues to grow and evolve. Brisbane EDA is committed to deepening the understanding of local Aboriginal culture and history by developing and facilitating programs that provide non-Indigenous tourism businesses with opportunities to establish culturally appropriate and respectful practices. This has resulted in meaningful partnerships with Indigenous and non-Indigenous tourism businesses in the region. However, increased funding and programs are now needed to enable Indigenous businesses to scale-up to meet increasing market demand. This includes financial and human resourcing, business capacity programs, relationship building programs between Indigenous and non-Indigenous tourism businesses, and coaching and mentoring programs that all need to be delivered.



The international marketing of these Indigenous experiences is delivered through Tourism Australia programs, however, there is a gap in contracting these experiences with international trade partners. Export-ready programs and mentoring by long-established tourism businesses could assist in addressing this gap. Meaningful partnerships are required to address tourism activities on Native Title land. These partnerships should be with First Nation peoples, industry, and government.

### Digital Transformation

To remain internationally competitive, the tourism industry will need to optimise the use of new digital platforms and technologies as they emerge, ensuring tourism products and services are available in formats that meet the ever-changing needs of the domestic and global consumer. This includes providing access to digital booking/purchasing platforms, flexible payment options, new forms of transportation, and virtual experiences.

### Visitor Economy Working Group

A new National Visitor Economy Working Group, based in Brisbane, is proposed as a collaboration between industry, government, and the research community. Its remit is to provide improved research links between industry and government as we all adapt to a changing local, State, national and global landscape. In collaboration with the innovation sector the Working Group will help to evolve and adapt business practices for the tourism industry of tomorrow.

### Embracing the New Green Economy

Community support and a social licence for tourism are increasingly important considerations, particularly as visitor volumes and interest in natural experiences grow. Effective strategic planning requires engagement with communities at an early stage in overall business planning – gaining consensus, securing support, encouraging engagement, and building awareness of the economic and social benefits of sensitive tourism development. Environmental education will become paramount as this sector grows.

### **Recommendations**

- **Develop and implement a Brisbane Capital City Visitor Economy Strategy that agreed between City and State and embraced by all layers of government and industry.**
- **Prioritise the marketing of Brisbane, as Queensland’s Capital City and international gateway.**
- **Develop and invest in collaborative and connected demand strategies (aviation, marketing, development of iconic itineraries, industry readiness programs) that elevate the region’s global profile in agreed priority markets.**
- **Secure a four-year funding program of \$100 million for Aviation Capacity Expansion (ACE) in Queensland across Queensland’s International Airport Network to support both domestic and international airline route retention, development, and expansion.**
- **Based on the significant success of both the Acquisition and Leveraging Fund (ALF) and the National Business Events Program (NBEP), the State Government make the program permanent and boosted.**
- **Invest in marketing programs that support driving demand to Indigenous tourism businesses.**
- **Invest in digital transformation programs for visitor economy businesses.**
- **Establish a Visitor Economy Working Group in Brisbane as a collaboration between industry, government and the research community to provide improved research links between industry and the region’s leading education providers. A Visitor Economy Lab will provide the industry with evidence needed to invest, so industry can stay ahead of global changes.**

- **Showcase hero sustainability experiences.**
- **Establish and implement benchmarks to track sustainability performance.**
- **Ensure social licences are integrated in all green economy experiences.**
- **Increased support for nature-based tourism projects and proposals.**

## Conclusion

The COVID-19 pandemic has disrupted the Brisbane and Queensland visitor economy, with billions of traditional revenues lost, impacting business locally and across the State. In submitting to *Designing our Tourism Future*, the Brisbane EDA position on how to reinvigorate our tourism landscape to grow and prosper is clear.

Brisbane's own vision for a future visitor economy, *Visitor Economy 2031: Vision for the Brisbane Region (VE2031)* report clearly outlines what is required to secure an additional \$6.5 billion per annum in visitor expenditure by 2031.

Brisbane EDA supports the view that the current economic climate, whilst damaged post-COVID, provides a rare opportunity to drive tourism initiatives and sustainable growth, led by industry and enabled by all levels of government. The local economy can be recovered and reinvigorated with increased attention to, and investment in, the enclosed series of recommendations.

# VISITOR ECONOMY 2031 VISION FOR THE BRISBANE REGION.

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SEPTEMBER 2019



**brisbane**  
marketing

ECONOMIC  
DEVELOPMENT  
BOARD

**brisbane**  
australia's new world city



## Acknowledgement of Country

Brisbane Marketing acknowledges the ongoing connection to country of the traditional custodians of this region and pays its respect to elders past, present and emerging. Our visitor economy is enhanced by its connection to the people and stories of the Aboriginal and Torres Strait Islander people.

Printed on 100% Recycled Paper

Front Cover Image Location: Story Bridge, Brisbane River

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THE VISITOR ECONOMY REPRESENTS ONE OF THE MOST SIGNIFICANT GROWTH OPPORTUNITIES FOR OUR REGION OVER THE NEXT DECADE. THIS GROWTH WILL NOT ONLY SUPPORT OUR BUSINESSES, NEW JOBS AND ECONOMIC GROWTH, BUT ALSO PROVIDES MORE TO SEE AND DO IN THE REGION FOR LOCALS AND THEIR VISITING FRIENDS AND RELATIVES.

CR ADRIAN SCHRINNER  
LORD MAYOR OF BRISBANE



Image Location: White Rock, Spring Mountain Conservation Estate, Ipswich

# THE OPPORTUNITY.

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*Image Location: Moreton Island*

# THE VISION AT A GLANCE.

*The Visitor Economy 2031: Vision for the Brisbane Region (VE2031)* aims to enhance the contribution of the visitor economy to the region's lifestyle, environment and economy through capturing greater value for our communities and sustainably managing growth.

The Brisbane Region extends from the coastal communities of Moreton Bay and Redlands Coast, through the cities of Brisbane, Ipswich and Logan, to the hinterland of the Scenic Rim, Lockyer Valley and Somerset, and collaborates with the Gold Coast and Sunshine Coast to deliver world-class visitor experiences.

The region is experiencing a once-in-a-generation transformation of the visitor economy with more than \$12 billion of new projects planned and underway. This investment, our favourable subtropical climate, accessibility and connectedness to the rest of the world and our destination appeal provide potential to secure an additional \$6.5 billion p.a. in visitor expenditure, above the \$10 billion forecast spend, by 2031.

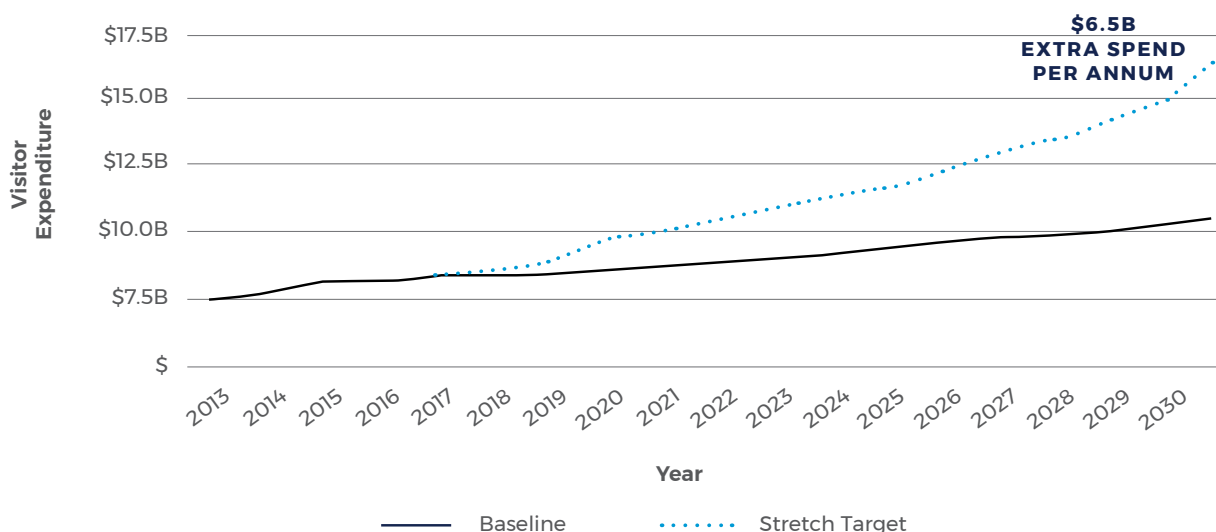
## The goals of the Visitor Economy 2031 Vision are to:

- Secure an additional **\$6.5B p.a. in visitor expenditure**, above the forecast growth;
- Deliver significant **benefits to residents' lifestyle** through more experiences and attractions, lifting local support for the visitor economy;
- Deliver **quality visitor experiences** that exceed visitors' expectations and build brand awareness and global advocacy;
- Drive a **positive contribution to our environment** through restoration projects and environmental education;
- **Increase dispersal** of visitation throughout the region, and across South East Queensland positioning the region as a base to explore Australia; and
- Create **lifelong connections** for locals and visitors through our signature experiences.



**OUR AIM IS TO BUILD A GLOBALLY RECOGNISED BRAND FOR THE BRISBANE REGION THROUGH REMARKABLE EXPERIENCES, GIVING VISITORS MORE REASONS TO STAY AND SPEND AND CREATE LIFELONG CONNECTIONS.**

2031 POTENTIAL IN EXPENDITURE FROM THE VISITOR ECONOMY



# THE VISITOR ECONOMY TODAY.

The Brisbane Region currently receives 24 million visitors staying 51 million visitor nights. The graphic shows which visitors are having the greatest impact on visitor nights.

Visitors coming to see their friends and relatives contribute the most visitor nights (35%) and education visitors have the longest average stay accounting for only 4% of visitors but 18% of overall visitor nights. In addition to the importance of nights in region it is important to note that business event visitors spend the most per day and leisure visitors participate in the most experiences.

The Brisbane Region extends east to the blue water of Moreton Bay, south to the Logan and Albert Rivers, north to Pumicestone Passage and west to the foothills of the Great Dividing Range and the Gondwana Rainforest World Heritage Area. It incorporates a network of connected communities across South East Queensland with our partners on the Gold Coast and Sunshine Coast.

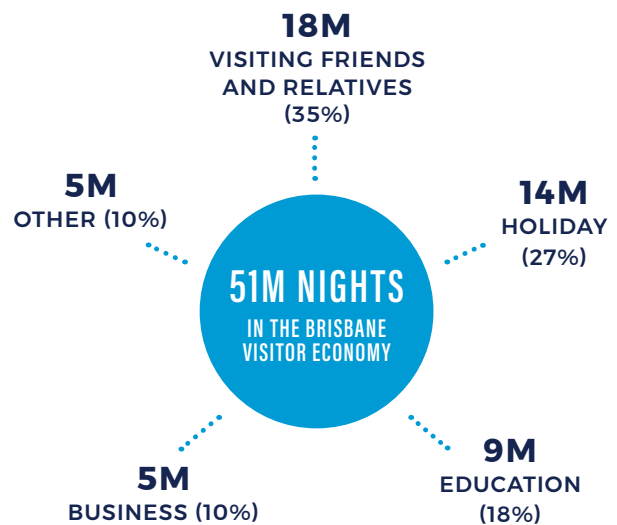
The surrounding regions offer of world class infrastructure, education providers, attractions and events, alongside accessible natural experiences, provides the potential for Brisbane to be positioned as the Asia Pacific's leading New World City.

The benefits of visitation and expenditure extend beyond direct support for employment. The Visitor Economy contributes to:

- Overall positive perception and attractiveness of the city and region as a place to live, work, study and invest;
- The vibrancy and vitality of precincts and entertainment areas; and
- Supporting facilities and programs that are enjoyed by communities as well as visitors.

With 67% of total regional expenditure staying within Brisbane City, the opportunity exists to better disperse visitors.

## VISITOR NIGHTS TO THE BRISBANE REGION BY PURPOSE OF VISIT IN 2018



## 2018 VISITOR DISPERSAL:





## THE 2018 VISITOR ECONOMY:



**24M**  
VISITORS  
GROWING AT 8%  
PER ANNUM



**51M**  
OVERNIGHT  
STAYS



**2.7 DAYS**  
ON AVERAGE  
IN REGION



**\$7.8B**  
OVERNIGHT  
VISITOR SPEND



**\$12B**  
OF INVESTMENT  
UNDERWAY



**64,700**  
EMPLOYED

The Brisbane Region's visitor numbers are growing at rates faster than the national average, however, the region converts fewer visitors to overnight stays than other capital cities, and our average length of stay and spend per day are lower.

**If the Brisbane Region lifted its conversion spend and stay to the national average, visitors would spend an extra \$12 million per day.**



*Image Location: Kangaroo Point*

# UNLOCKING THE REGION'S POTENTIAL.

**With its location in the Asia Pacific region, growth in airline capacity and its natural appeal, Brisbane is ideally positioned to experience significant increases in the volume of visitors.**

The next decade will see the region transformed, with more than \$12 billion of new projects underway and significant planning in progress for key precincts. Key projects include the addition of more than 5,000 new hotel rooms since 2014, the completion of the Howard Smith Wharves entertainment and lifestyle precinct (\$200 million); Brisbane Airport second runway (\$1.4 billion) and Brisbane International Cruise Terminal (\$158 million) both due in 2020; the Queen's Wharf Brisbane development (\$3.6 billion) and the new Queensland Performing Arts Centre (\$150 million) due in 2022; and transport projects Brisbane Metro (\$994 million) and Cross River Rail (\$5.4 billion) due in 2023 and 2024 respectively.

These projects (shown as 'Growth from Investment' in the graph below) and our existing world-class infrastructure have the potential to drive an **additional \$2.3 billion p.a.** in visitor spend (above the \$10 billion forecast), if effectively leveraged by the region. This includes growing the number of student and business event visitors to the region.

The potential exists to leverage these new projects to create greater destination awareness and encourage additional investment in major attractions and experiences to increase average length of stay, dispersal of visitors and spend per person in the region.

In addition to the impact of additional visitor spend from committed investment, there is an **additional \$4.2 billion of potential spend p.a.** (with \$1.8 billion from longer stays and \$2.4 billion from greater spend per day). That is the equivalent of \$12 million per day, if the region can:



**CONVERT JUST 4% MORE VISITORS THAT ARE PASSING THROUGH TO STAYING OVERNIGHT**



**ENCOURAGE VISITORS ALREADY COMING TO STAY AN EXTRA 0.5 DAYS ON AVERAGE**

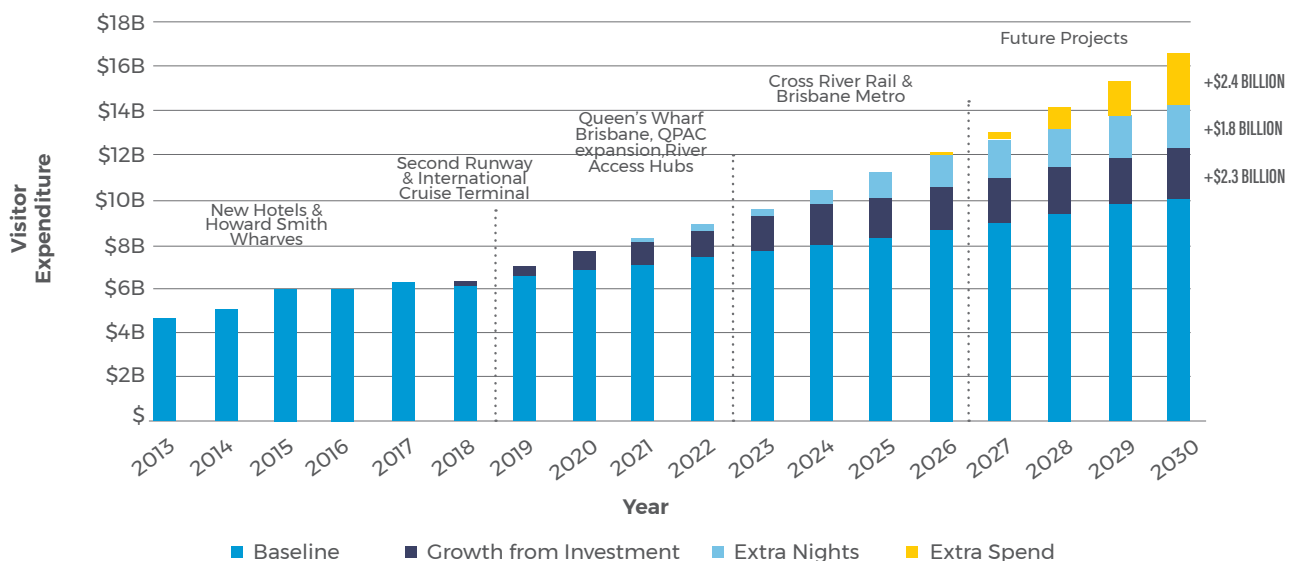


**ENCOURAGE 8% MORE VISITORS TO PURCHASE AN EXPERIENCE**



**LIFT SPEND PER PERSON BY 15% ABOVE FORECAST**

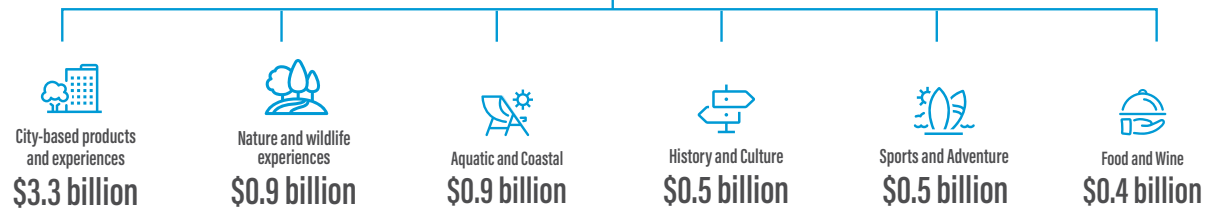
2031 VISITOR EXPENDITURE: IMPACT OF INVESTMENT



# THE IMPACT.



**ADDITIONAL \$6.5B IN VISITOR SPEND P.A. IN 2031  
WHICH COULD BE SPREAD ACROSS:**



*Image Location: North Stradbroke Island*

# THE VISION.

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*Image Location: Mount Alford, Scenic Rim*

# THE 2031 VISION.

The Vision is to be:

A GLOBALLY RECOGNISED DESTINATION KNOWN FOR CONNECTING VISITORS AND THE COMMUNITY WITH ITS ENVIABLE LIFESTYLE, ACCESSIBLE NATURE, REMARKABLE EXPERIENCES, AUTHENTIC CULTURE AND EVENTS, AND RENOWNED FOR BEING SUSTAINABLE, CREATIVE AND RESPECTFUL.

The goals of the Visitor Economy 2031 Vision are to:

- Secure an additional **\$6.5B p.a. in visitor expenditure**, above the forecast growth;
- Deliver significant **benefits to residents' lifestyle** through more experiences and attractions, lifting local support for the visitor economy;
- Deliver **quality visitor experiences** that exceed visitors' expectations and build brand awareness and global advocacy;
- Drive a **positive contribution to our environment** through restoration projects and environmental education;
- **Increase dispersal** of visitation throughout the region, and across South East Queensland positioning the region as a base to explore Australia; and
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OUR AIM IS TO BUILD A GLOBALLY RECOGNISED BRAND FOR THE BRISBANE REGION THROUGH REMARKABLE EXPERIENCES, GIVING VISITORS MORE REASONS TO STAY AND SPEND AND CREATE LIFELONG CONNECTIONS.

## THE POTENTIAL 2031 VISITOR ECONOMY:



**13M**

EXTRA VISITORS  
GROWING AT 5%  
PER ANNUM



**\$6.5B**

ADDITIONAL  
OVERNIGHT  
VISITOR SPEND



**48M**

EXTRA  
OVERNIGHT STAYS  
GROWING AT 6%  
PER ANNUM



**3.2 DAYS**

ON AVERAGE  
IN REGION



**50,000**

ADDITIONAL  
EMPLOYEES



**\$2.6B**

ADDITIONAL SPEND  
DISPERSED ACROSS  
THE REGION

# THE 2031 TARGET AUDIENCE.

Targeting High Value Travellers in partnership with industry, the Brisbane Region is expecting an increase in overnight visitors spending more on our signature experiences. This approach aims to achieve the \$6.5 billion additional spend through increasing spend and length of stay, rather than than a focus on volume.

High Value Travellers seek to make an authentic connection with a destination to feel like a local. They spend more per day and stay longer and are more likely to invest in experiences.

While day trips are important, the combined value of international and domestic overnight visitors will contribute nearly 90% of total visitor spend, from 76% of total visitor numbers. These visits will continue to be a mix of visiting friends and relatives (32%) holiday (28%), education (23%) and business visitor nights (17%).

Our visitors will come from the regional drive market (400km radius), interstate capital cities and our six top international markets, with China playing an increasingly important role and strong growth forecast from India, North America, Korea, Japan and the United Kingdom.

## KEY CHANGES IN THE 2031 VISITOR MIX.



**INTERNATIONAL VISITOR SPEND IN REGION TO INCREASE FROM 34% TO 51% OF TOTAL SPEND**

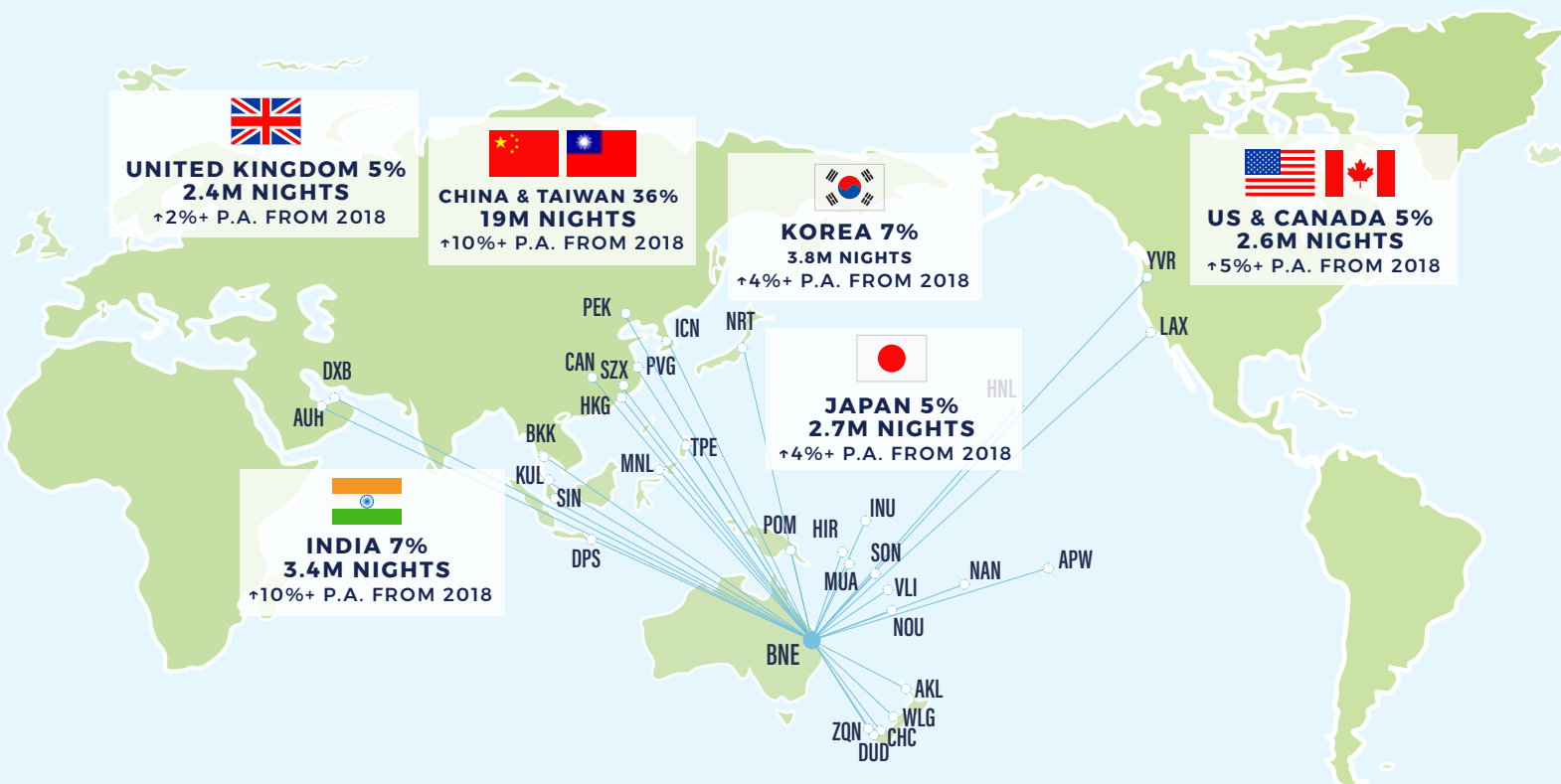


**THE EDUCATION MARKET TO GROW FROM 18% TO 23% OF VISITOR NIGHTS**



**GROWTH FROM CHINA AND INDIA WILL ACCOUNT FOR 78% OF ADDITIONAL INTERNATIONAL NIGHTS**

## TOP SIX INTERNATIONAL MARKETS: FORECAST SHARE OF TOTAL VISITOR NIGHTS IN 2031



# AN EXPERIENCE-LED BRAND.

Brisbane has its own unique and compelling story to tell, and that is exactly what visitors of today are looking for.

In a globally competitive market, the articulation and positioning of the region's unique experiences is what will set Brisbane apart from the pack.

Central to the destination's unique positioning is an authentically-Australian sense of innovation, a spirit of collaboration and optimism, a warm welcome extended to visitors, a range of natural and cultural attractions, and an enviable lifestyle enjoyed by locals.

The aim is for Brisbane to be known around the globe as a world-class place to visit, study, meet, invest and do business.

With nature on its doorstep, clear blue skies, an enviable climate year round and a subtropical alfresco lifestyle, the Brisbane Region and its connections across South East Queensland offers a network of urban centres, each with a relaxed and welcoming vibe – a region that embodies the best of Australia. This story is best told through our *hero experiences* supported by the key destination attributes:

- A subtropical open-air city with a year-round calendar of cultural immersion and significant events;
- Urban adventures and an enviable outdoor lifestyle;
- World-class infrastructure that makes it easy to move around and to soak up the nature on our doorstep;
- Some of Australia's best nature and wildlife experiences in easy reach of a global city; and
- Friendly and welcoming locals who make it easy to make a lifelong connection to Brisbane.

## THE HERO EXPERIENCE PILLARS FOR BRISBANE ARE:

### AUSTRALIA'S URBAN ADVENTURE CAPITAL



### A GLOBAL OPEN-AIR GREEN CITY EMBRACING THE RIVER AT ITS HEART



### A PRISTINE BAY OF ABORIGINAL CULTURE AND WILDLIFE



### A MAJESTIC RIM OF MOUNTAIN PEAKS, FERTILE VALLEYS AND RAINFORESTS



These hero experiences, along with our events, build on our destination strengths, positioning Brisbane as Australia's Nature Capital. They rely on the region's core and desirable attributes as an open air region, with an enviable lifestyle, a safe, stable and secure economy, world-class infrastructure and home of global talent.

# ASPIRATIONS AND PRIORITIES.

**If the region achieves its vision, by 2031 the Brisbane Region will have:**

- A **clear understanding in our target markets of what the region is known for**, supported by signature experiences that appeal to our target markets;
- **Partnerships** across industry and government to share the story and grow the visitor economy;
- Increased **direct air access** both domestically and internationally;
- A **year-round events program** backed by the infrastructure required to support mega events (e.g. a 2032 Olympic Games);
- More **experiences** that enhance the destination's desirability and keep people in the region longer;
- **Easy access** to anywhere in the destination and across South East Queensland to participate in the region's signature experiences;
- A **skilled and adaptive workforce** and high standards of service quality;
- A **vibrant and creative industry** that is adapting to the changing needs of the global visitor market;
- An enhanced and protected **environment and lifestyle** that visitors are coming to enjoy; and
- A supportive and **welcoming community** that embraces visitors and the visitor economy as part of its lifestyle.

**THESE ASPIRATIONS CAN BE SUMMARISED INTO SIX STRATEGIC PRIORITIES:**



**BUILDING A GLOBALLY RECOGNISED BRAND**



**UNLOCKING THE POTENTIAL OF AUSTRALIA'S NATURE CAPITAL**



**AN ACCESSIBLE AND CONNECTED REGION**



**A VIBRANT AND CREATIVE INDUSTRY**



**A SKILLED AND ADAPTIVE WORKFORCE**



**SUCCESS THROUGH PARTNERSHIPS AND COLLABORATION**



**OUR \$3.6 BILLION INTEGRATED RESORT DEVELOPMENT WILL TRANSFORM BRISBANE WITH A DIVERSE MIX OF NEW RIVERFRONT SPACES; DINING OPTIONS FOR EVERY TASTE AND BUDGET; EXCITING NIGHTLIFE AND ENTERTAINMENT; LOCAL AND INTERNATIONAL RETAIL BRANDS; REPURPOSED HERITAGE SPACES; AND WORLD-CLASS HOTELS. BRISBANE IS PERFECTLY POSITIONED AS A GATEWAY FOR VISITORS FROM ASIA INTO AUSTRALIA."**

**GEOFF HOGG, GROUP EXECUTIVE OPERATIONS  
THE STAR ENTERTAINMENT GROUP**



# GUIDING PRINCIPLES.

The actions required to deliver the 2031 goals and aspirations should adhere to the VE2031 Vision Guiding Principles:

**An experience-led approach to increasing global awareness:** Showcasing the experiences that celebrate the unique selling proposition of the Brisbane Region is key to building global awareness. An experience-led approach directly linked to increasing spend from key markets to drive demand and convert visitors to overnight stays is crucial to achieving the VE2031 Vision.

**Positioning the region as a base to explore, rather than a gateway, to increase stay and spend:** By 2031, the region has the potential to secure an additional \$6.5 billion p.a in visitor expenditure, above forecast growth. To drive conversion of visitors passing through into overnight stays, new experiences are needed to enhance the region's desirability, aspirational appeal and provide additional reasons to visit, increase dispersal and capture visitor spend and stay, whilst working in partnership with other leading destinations.

**Respect and authenticity are central to the presentation of the region's unique stories:** A clear narrative that is owned and shared by communities, businesses and key stakeholders is essential. The region needs to have confidence in its narrative to speak about what is unique and authentic in Brisbane that sets it apart in a way that is culturally appropriate, inclusive and genuine.

**Greater dispersal geographically, across the week and the year, and between experiences:** Increasing dispersal of visitors throughout South East Queensland is essential if average length of stay and visitor expenditure are to grow.

**Shared experiences between visitors and locals to build lifelong connections to the region:** Explore new ways to build community support for the visitor economy, building awareness of the sector's contribution to overall liveability, and creating places and experiences that connect locals and visitors. Local communities and visitors will be proud ambassadors for Brisbane as a great region to visit, study, meet, invest and do business.

**Lifestyle and environment are protected and enhanced through the visitor experience:** The bay, river and hinterland provide the Brisbane Region with a natural advantage. The region needs to develop and create experiences that demonstrate the authentic Brisbane story. Utilising the experience development framework, experiences need to differentiate the region and ensure every visitor connects to the region and its peoples, whilst maintaining the region's unique attributes.

**The destination is collaborative, flexible and adaptable:** In its response to a changing global landscape the destination must adapt to changes in trends such as disruptions caused by the share economy, world events and rise of the conscious traveller.



Image Location: Kooroomba Vineyard and Lavendar Farm

# THE STRATEGY.

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*Image Location: Moreton Island*

# SIX STRATEGIC PRIORITIES.

The Visitor Economy 2031 Vision recognises that a partnership approach is required to ensure the successful implementation of each priority project.

The six key strategies identified under the themes are described at a level that provide an overarching ambition that will direct twelve years of activities from the partners (detailed in three-year rolling action plans, prepared and reviewed annually).





# 1. BUILDING A GLOBALLY RECOGNISED BRAND.

The Asia Pacific is the world's fastest growing tourism region (7% p.a. to 2031, World Travel & Tourism Council). The Brisbane Region is growing faster than the national average in attracting international visitors (8% growth 2014-18).

Brisbane aims to evolve from its position as a gateway city, by converting a higher proportion of visitors passing through into overnight stays. Brisbane Airport's new runway will provide a similar capacity to Singapore and Hong Kong Airports. Marketing, generating new demand, and route development, delivering increased seat capacity, are key enablers if the potential is to be fulfilled.

Communicating the Brisbane Region's proposition to the identified target markets is essential to increase market share from what is a low awareness base at present. Innovative application of technology, such as creating an on-demand consumer platform for collecting and sharing inspiring content and experiences, will play an important role in sharing our story.



THE BRISBANE REGION IS UNDERGOING A CULTURAL AND SPIRITUAL AWAKENING WITH THE REALISATION THAT ABORIGINAL COUNTRY, CULTURE AND PEOPLE HAVE A CRITICAL ROLE TO PLAY IN THE REGION'S FUTURE. WE HAVE THE POTENTIAL TO BE KNOWN ACROSS THE GLOBE AS A LEADING ECO-CULTURAL DESTINATION WORKING TOWARDS A GLAD TOMORROW.

CAMERON COSTELLO, CHIEF EXECUTIVE OFFICER  
QUANDAMOOKA YOOLOOBURRABEE ABORIGINAL CORPORATION

## The region needs:

- A **clear narrative** that is owned and shared by communities, businesses and stakeholders;
- The ability to **share the story globally** and with visitors who are in-region;
- To **build support and awareness** for the visitor economy among Brisbane region communities and businesses;
- To **review funding options** that support increased investment in destination awareness, route development and infrastructure;
- Collaborative, connected, and financially supported **destination management strategies** across the region;
- To establish a set of **'points of difference'** backed by signature experiences;
- To **deliver on the region's natural advantage** while continuing to contribute to the Global Sustainable Development Goals and the Commonwealth and State Government sustainable development commitments; and
- Take new, **commissionable tourism products** to the global consumer.

# PROJECTS & RESPONSIBILITIES.

1. Building A Globally Recognised Brand - Collaboration is needed across industry, Government and neighbouring regions, to grow the combined effort in building awareness of what the Brisbane Region has to offer to encourage visitors to choose the region as their destination and their first stop in Australia.

**1.1 CATALYST PROJECT:** Elevate the region’s global profile in agreed priority markets through an increased investment across industry and government partners via a collaborative marketing fund supported by new funding models.



**1.2 CATALYST PROJECT:** Promote Brisbane as part of iconic Australian journey for key international markets (in partnership with other leading Australian destinations).



**1.3** Maximise the impact of marketing investments via an agreed regional narrative and signature experiences and amplify the story of an outdoor city where nature abounds through a new Global Ambassadors’ Program.












**1.4** Coordinated marketing efforts in international cities with increasing direct air access to Brisbane including an international sales force and a more coordinated approach to driving awareness of Brisbane and the broader South East Queensland region.



**1.5** Develop a clear sustainability agenda for the visitor economy, connected to the region’s narrative, developed in response to the community’s aspirations around improving liveability, and through industry-driven vision and buy-in.



## KEY.

- |   |  |  |
|---|--|--|
|  Brisbane Marketing                      |  Tourism and Events Queensland                              |  Local Governments                            |
|  South East Queensland Council of Mayors |  Department of Innovation, and Tourism Industry Development |  Queensland Tourism Industry Council          |
|  Industry Partners                       |  Other Agencies   |  Lead / joint lead agency for that initiative |



## 2. AN ACCESSIBLE AND CONNECTED REGION.

Increasing dispersal of visitors across South East Queensland is essential, if average length of stay and visitor expenditure are to increase. Limited transport options and lack of signature experiences have constrained dispersal over the past decade.

The number of visitors arriving by air and by cruise ship is set to double with major investments in infrastructure. Enabling infrastructure to connect the airport and cruise terminals with the city, bay, river and hinterland is vital.

Connectivity for the growing drive market and those looking to explore the region by road will put increasing pressure on road infrastructure and increases the need for commercial tour operators and more innovative transport solutions.

Rivers represent a unique transport option for the region – connecting the bay, the city and the hinterland – and need to be a greater focus for travel along and across.

The aspirations outlined in the *SEQ City Deal* to deliver a 45-minute region applies equally to the visitor economy and the commuter. Ensuring the region has the transport infrastructure and event venues required to support the major events strategy, delivery of the 2032 Olympic Games (if a bid is successful) and providing the required connectivity to the region's visitor attractions and infrastructure is essential.



**BRISBANE IS ENTERING AN ERA OF EXTRAORDINARY OPPORTUNITY AND BRISBANE'S NEW RUNWAY IS A CATALYTIC INVESTMENT THAT WILL ENABLE SIGNIFICANT GROWTH IN INTERNATIONAL VISITORS FOR DECADES TO COME.**

**GERT-JAN DE GRAAFF, CHIEF EXECUTIVE OFFICER  
BRISBANE AIRPORT CORPORATION**

### The region needs:

- **New international direct routes and additional airline capacity** from key priority international markets;
- **Connected and accessible transport systems** that support dispersal of visitors across the region (the Brisbane Region and South East Queensland as a whole);
- A **visitor management plan** which addresses the construction disruption in CBD precincts over the next 5-10 year period and identifies solutions for dispersing visitors;
- **Connections and transport options** that unlock the potential of the hinterland, bay and islands;
- Continued **investment in river facilities** for fuelling, sullage and overnight berths, to unlock the river's full potential as a transport artery and visitor experience;
- **Wayfinding and integrated ticketing solutions** that are accessible for visitors and communities;
- To **build itineraries that maximise expenditure** for visitors such as the forecasted growth for the cruise industry;
- Development and promotion of **iconic journey itineraries** which drive dispersal; and
- To ensure that the region has the **transport and venue infrastructure** necessary to attract and deliver the major events program (including a potential 2032 Olympics bid).

# PROJECTS & RESPONSIBILITIES.

**2. An Accessible and Connected Region - Continued investment is needed in connectivity across the region so that visitors and locals can seamlessly move between transport hubs, accommodation and experiences to spend more time enjoying the things that set the region apart – nature, world-class tourism infrastructure and welcoming and passionate people.**

**2.1 CATALYST PROJECT:** Visitor economy partners will be strong advocates in shaping a successful SEQ City Deal to ensure connectivity of the region for locals and visitors. A gap analysis is required of key transport and events infrastructure needs for the visitor economy to make the connection of the key precincts easy for visitors and building towards a 2032 Olympics bid.



**2.2 CATALYST PROJECT:** Development of a 2031 River and Bay Activation Strategy that builds on the understanding of forecast demand and unique urban adventures, and the role of the rivers and waterways, and encourage investment in marine infrastructure to support new vessels including fuel, sullage, supplies and overnight berths.



**2.3** Continue to build the SEQ Region’s competitive advantage with increasing direct air access through partnership route development funds that grow the Brisbane Region’s share of international visitors and visitor nights in key target markets.



**2.4** Work across agencies to deliver more seamless and internationally competitive visa entry conditions, fee structures, visa processing and entry experience for international visitors, students and key workers, including a US Customs Pre-Clearance facility.












**2.5** Adopt a proactive approach to regional visitor dispersal through iconic journeys and ongoing experience development. This would include support for the development of new experiences that drive demand; product packaging; working with transport operators and cruise lines; leveraging major and business events; encouraging more visiting friends and relatives and international students; and influencing investment in key infrastructure.



**2.6** Adopt a planned approach to connecting visitor precincts with wayfinding and transport infrastructure (bridges, public transport) to precincts that both locals and visitors will enjoy, including new major events infrastructure.



## KEY.

- |   |  |  |
|---|--|--|
|  Brisbane Marketing                      |  Tourism and Events Queensland                              |  Local Governments                            |
|  South East Queensland Council of Mayors |  Department of Innovation, and Tourism Industry Development |  Queensland Tourism Industry Council          |
|  Industry Partners                       |  Other Agencies   |  Lead / joint lead agency for that initiative |



### 3. A SKILLED AND ADAPTIVE WORKFORCE.

A skilled and motivated pool of talent is essential if the region is to deliver on its 2031 visitation and expenditure targets. This starts with the right education providers attracting students and new talent, and then ensuring lifelong learning opportunities and career options exist within the region to attract and retain the best visitor economy workforce and drive industry innovation.

A pool of talent is essential to not only meet future workforce needs but to drive industry innovation and boost the region's intellectual capital and adaptability. International students play a key role in this, not only as a target market and workforce, but in their capacity to contribute to the region's innovation ecosystem and drive future growth potential.

For the region to meet its growth potential and deliver an additional \$6.5B per annum in visitor expenditure, a range of industry capacity building and workforce issues need to be considered. Issues such as visa policy and processes, the attractiveness of tourism and hospitality as a career choice, and delivery of consistent service levels are issues impacting on the region's national competitive advantage.

The region needs to forge closer and more effective links between industry and high-quality education providers. This can help nurture a job-ready workforce and generate research and development support that help drive business-competitiveness through innovation. It is also essential to support a key visitor market, international students, who are a valuable source of expenditure (direct activity and VFR).

Brisbane must maintain its well-earned reputation as a great student city (92% satisfaction) in the face of increasing global competition for international students and the growing popularity of remote learning.

#### The region needs to:

- **Address the challenge** that tourism is not widely seen as an attractive career option;
- Work with industry and representatives at state and national levels to **ensure that visa policy and processes allow the industry to compete** with other destinations in terms of entry fees and processing times for skilled labour;
- Work with existing and new education and training providers to **ensure the region offers the right mix of research, education and training** to meet the future needs of the region;
- Consistently **deliver excellent levels of service** across tourism and hospitality experiences and **create a new benchmark** for service levels;
- Forge **closer links** between industry and education providers;
- Build a **competitive position as a Top Global Student City** through improved marketing and working with education providers to be responsive to the trend towards online and short course/ micro-credentials;
- Deliver a **better student and overall visitor welcome experience** to showcase the region's unique visitor experiences;
- Develop **comprehensive data collection systems** to inform investment and management decisions; and
- Embrace **technology and new developments** in digital, sharing economies and automation.



THE REGION WILL NEED AN ADDITIONAL 50,000 EMPLOYEES BY 2031 TO BE SUCCESSFUL IN MEETING THE EXPENDITURE TARGETS. TO ACHIEVE THIS BRISBANE NEEDS TO BECOME A HUB FOR GLOBAL TALENT.



# PROJECTS & RESPONSIBILITIES.

## 3. A Skilled and Adaptive Workforce - Adopt a “Team Brisbane” approach to driving innovation, building the future workforce and investing in industry capacity building to deliver the destination experience and create a lifelong connection with the region.

**3.1 CATALYST PROJECT:** Establish a Queensland Visitor Economy Lab, based in Brisbane, as a collaboration between industry, government and the research community to provide improved research links between industry and the region’s leading education providers, to help the industry have the evidence needed to invest in staying ahead of global changes.



**3.2 CATALYST PROJECT:** Establish a business scale-up program for the visitor economy with the support of entrepreneur mentors, ambassadors and new project funding sources to encourage businesses to meet the growing market demand.



**3.3** Strengthen connections between the tourism, events and education sector to build and upskill the workforce of the future, improve research extension into action, and encourage students to become the investors, ambassadors and entrepreneurs of the future.



**3.4** Position Brisbane as a regional talent pool through attracting new globally recognised higher education facilities and business events that extend the reach and frequency of our connections with global education providers and research and development facilities, and leverage our industry growth sectors.



**3.5** Invest in ongoing industry capacity building to assist existing businesses to adapt to the current market and create authentic experiences. This includes support for existing cultural facilities and creative organisations to create new commissionable product to increase average length of stay and spend.



**3.6** Better inform industry decision making by exploring complementary data sources to develop a more comprehensive data collection system to understand and share visitor trends at a precinct and community level.



### KEY.

**BM** Brisbane Marketing

**SEQ COM** South East Queensland Council of Mayors

**IP** Industry Partners

**TEQ** Tourism and Events Queensland

**DITID** Department of Innovation, and Tourism Industry Development

**OA** Other Agencies

**LGs** Local Governments

**QTIC** Queensland Tourism Industry Council

**Lead / joint lead agency for that initiative**



## 4. A VIBRANT AND CREATIVE INDUSTRY.

With its natural appeal, leading cultural institutions and a creative community, and increasing connectivity to the Asia Pacific Region, Brisbane is ideally positioned to experience significant increases in the volume of international and domestic overnight visitor arrivals.

The principal challenge is in facilitating investment in new and improved experiences that bring the destination to life and generate visitor demand.

The region benefits from a sub-tropical lifestyle as part of its natural advantage, however lacks the necessary range and depth of visitor experiences. Experiences need to be connected to authentic local stories, including those that can cater for large groups.

A proactive approach to facilitating and attracting investment is required to retain our talent and persuade entrepreneurs and creative enterprises to choose the Brisbane Region. Innovative private and public sector solutions are required to support development of compelling business cases and securing funding for new visitor experiences.

### The region needs to:

- Take a coordinated approach to **event acquisition and development** including alignment of event infrastructure investment such as a future Olympics bid;
- Attract investment which delivers a **greater range of visitor experiences** that appeal to current and future markets;
- Take a coordinated approach to providing **incentives that attract investment** across the region;
- **Support businesses, creative enterprises and entrepreneurs** to develop new visitor experiences;
- Review the opportunities for an ongoing funding program which supports business cases for **major new visitor experiences**;
- Streamline and wherever possible standardise the approvals process for new experiences to **drive increased dispersal** of visitors throughout the region;
- Encourage more **innovative approaches in the major events sector**, providing essential infrastructure and experiences that can cater for business events and incentive groups of 500+;
- Work with **cultural and creative institutions** to increase their significant contribution to the visitor economy and the future regional narrative; and
- Capitalise on the region's strengths, supporting development in areas such as **First Nations visitor experiences, events and cultural programs** and facilities.



BRISBANE HAS AN UNPARALLELED OPPORTUNITY TO DELIVER NEW VISITOR EXPERIENCES ON THE RIVER THAT BETTER CONNECT THE CITY, THE BAY AND THE HINTERLAND IN A WAY THAT WILL SEE PEOPLE SPEND MORE, DO MORE AND TO SHARE THIS POSITIVE STORY WITH THEIR CIRCLE OF INFLUENCE.

ANDREW MCEVOY, CHAIR  
SEALINK GROUP

# PROJECTS & RESPONSIBILITIES.

**4. A Vibrant and Creative Industry - The region needs to build a clear narrative around its authentic stories, especially Indigenous stories, natural areas and world-class tourism infrastructure including cultural institutions, attractions, accommodation, and support investment in unique experiences and more things to see and do that will encourage visitors to stay longer.**

**4.1 CATALYST PROJECT:** Development of a precinct-based visitor experience management plan to mitigate the disruption to visitor precincts and orientation during construction works and the delivery of major projects.



**4.2 CATALYST PROJECT:** Create an investment-ready environment to support the development of new attractions and experiences that showcase unique stories of the region and the state (Indigenous, creative, food, nature and adventure).



**4.3** Adopt a more coordinated approach across Local and State Government to place design and activation that encourages more flexible use of public spaces to connect locals and visitors in the public realm, including pop-up experiences to showcase the region's advantage as an outdoor city and activate precincts.



**4.4** Explore new partnerships with lenders and funding providers to secure support for new projects that encourage visitors to stay longer and create a stronger connection to the region.



**4.5** Continue to ensure a clear strategic direction and cooperation on major event development and acquisition and delivery across State and Local Government through the Regional Tourism Organisation.



**4.6** Establish a city and region-wide approach to event activation (business and major events). Leverage and maximise the Brisbane Region's competitive advantages to encourage longer stays and greater participation in the region's hero experiences. Support the creation of more innovative experiences and events and temporary visitor experiences through new policy and planning tools.



**KEY.**

Brisbane Marketing	Tourism and Events Queensland	Local Governments
South East Queensland Council of Mayors	Department of Innovation, and Tourism Industry Development	Queensland Tourism Industry Council
Industry Partners	Other Agencies	Lead / joint lead agency for that initiative



## 5. UNLOCKING THE POTENTIAL OF AUSTRALIA'S NATURE CAPITAL.

The Brisbane Tourism Investment Study, completed in 2017, indicated that \$800M of the \$6.5B growth potential for the region can be delivered through new nature-based experiences. This economic gain, and the opportunity for dispersal of visitors and associated expenditure, will not be achieved if connectivity is limited and an expanded range of visitor experiences which generate demand are not addressed.

Community support or a social licence for tourism are also increasingly important considerations, particularly as visitor volumes and interest in natural experiences grow. Effective strategic planning requires engagement with communities at an early stage in overall business planning – gaining consensus and building awareness of the benefits of sensitive tourism development.

A wide range of regulatory and legislative protections which govern development in protected and natural areas are in place. Protection of our most precious environments is essential, however complexity of approval processes in coastal and hinterland locations has been a major hurdle in attracting new tourism investment and bringing experiences to market.

There is much commonality in nature-based experiences across the region i.e. authentic food and drink, heritage, walking and mountain biking, Indigenous flora and fauna etc, however planning and co-ordination between partners are disparate. A great example is the opportunity in the food and wine area, with the region surrounded by food growing areas (including the Bay) but that food story is not cohesively shared, and significant policy barriers impede small entrants looking to develop new food tourism experiences.

### The region needs to:

- Grow visitor numbers and proposals for tourism projects in **natural areas and popular local spaces** requiring visitor management;
- Work with Government departments and management agencies to **review policy barriers** and identify opportunities for streamlining development processes in natural areas;
- Embrace the region's **clean, green and healthy food and beverage sector** and create remarkable visitor experiences and a strong narrative;
- Take a region-wide strategic approach to identifying **nature-based tourism opportunities** – the experiences which will generate demand and drive visitor dispersal;
- Investigate the opportunities for a coordinated package of nature-based product **investment incentives**;
- Realise the potential of nature-based experiences through an **experience development framework**;
- Integrate **social licence and community engagement** into strategic planning for new nature-based tourism development and build awareness of tourism benefits; and
- Encourage the development of **new educational experiences** in nature to maximise the region's competitive advantage of education providers in and close to nature.



**BRISBANE IS AUSTRALIA'S MOST BIODIVERSE CAPITAL CITY,  
SURROUNDED BY WORLD HERITAGE RAINFOREST AND A STUNNING  
BAY OF WILDLIFE AND THE WORLDS OLDEST LIVING CULTURE.**

# PROJECTS & RESPONSIBILITIES.

**5. Unlocking the Potential of Australia’s Nature Capital - Work across government and the community to nurture a shared approach to developing and delivering new experiences, supporting new ventures and building confidence in further investment to connect visitors with these experiences.**

**5.1 CATALYST PROJECT:** Develop a digital platform for visitor information and engagement (trade and consumer) that supports development and promotion of the best visitor experiences. Leverage the established sales platforms including a strong connection to locals and use of new technology including augmented and virtual reality.



**5.2 CATALYST PROJECT:** Collaborative planning and engagement with communities and a supportive regulatory environment to build and maintain support for nature-based tourism investment and activities.



**5.3** Finalise and deliver the *Brisbane Region Experience Development Framework*, supported by an accelerator program. Drive the development of new experiences that differentiate the region and provides support to ensure every visitor connects with the unique selling points including wellness, food, music, outdoor lifestyle, emerging technology, creativity and our Indigenous culture.



**5.4** A community engagement program around strategic planning for nature-based and food tourism experiences providing an evidence basis for government policy, investment attraction and environmental protection.












**5.5** Evolve the region’s visitor centres and online visitor services to better cater for the changing visitor market including international students, business event travellers, incentive groups and High Value Travellers.



**5.6** Proactive communications to local communities, businesses and visiting students to build awareness and participation in creative and cultural programs that bring locals and visitors together.



## KEY.

<p> Brisbane Marketing</p> <p> South East Queensland Council of Mayors</p> <p> Industry Partners</p>	<p> Tourism and Events Queensland</p> <p> Department of Innovation, and Tourism Industry Development</p> <p> Other Agencies</p>	<p> Local Governments</p> <p> Queensland Tourism Industry Council</p> <p> Lead / joint lead agency for that initiative</p>
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## 6. PARTNERSHIPS & COLLABORATION.

Effective collaboration is crucial to enabling success across the region's visitor economy. The need for collaborative initiatives and mechanisms which support the growth and management objectives run throughout the key strategic themes of Visitor Economy 2031: Vision for the Brisbane Region.

The need for collaboration between businesses and public sector partners within the city and across the region is essential across all levels.

The partnership framework aims to strengthen the connection between the stakeholders active in delivering visitor experiences including Government, industry and other agencies. At its heart it is a shared vision to inform future collaborative activities.

Developed through extensive consultation, the VE2031 Vision builds on existing local tourism, events and economic development strategies to provide a long-term vision for the visitor economy. This document is supported by an annually agreed three-year action plan negotiated with key stakeholders that addresses the detailed actions to deliver the vision.



**MORETON BAY REPRESENTS ONE OF THE BEST OPPORTUNITIES FOR THE BRISBANE REGION TO INCREASE OUR SHARE OF INTERNATIONAL VISITOR NIGHTS. WITH THE NATURALLY WONDERFUL BEAUTY AND THE QUANDAMOOKA CULTURE, REDLANDS COAST, ON BRISBANE'S DOORSTEP, IS SURE TO BE THE NEXT GLOBALLY SIGNIFICANT ECO-CULTURAL DESTINATION.**

**CR KAREN WILLIAMS  
MAYOR, REDLAND CITY COUNCIL**

### VISITOR ECONOMY 2031 VISION PARTNERSHIP FRAMEWORK



# PROJECTS & RESPONSIBILITIES.

## 6. Success through Partnerships and Collaboration - Effective partnerships and collaboration which delivers improved return on investment and delivery of customer-centric investment, policy and marketing programs in a way that is respectful and authentic.

**6.1 CATALYST PROJECT:** Establish and convene regular meetings of a Tourism Project Reference Group. The group's key mandate is to coordinate agency and community engagement for significant tourism projects with complex approvals and guide the implementation of the Visitor Economy Strategy.



**6.2 CATALYST PROJECT:** Embrace the authentic Indigenous stories of the region in partnership with Aboriginal and Torres Strait Islander people. Develop an Indigenous Engagement Framework for the region as part of the implementation of the State-wide Indigenous Tourism Strategy.



**6.3** Create a Brisbane Region welcome and service culture to encourage the community to welcome visitors. With an increasing focus on cultural connection, deliver visitor experiences in language for first-time visitors to Australia and newly arrived students seeking to connect with the region's story.



**6.4** Development of an annual, three-year rolling Action Plan which progresses the key initiatives of the 2031 Visitor Economy Strategy and monitors progress against key performance indicators.



**6.5** Development of an annual Policy Agenda with QTIC and the Regional Tourism Organisations to align our efforts around key shared State and Federal policy objectives to drive the visitor economy.



**6.6** Coordinated infrastructure planning, experience delivery and marketing through a Visitor Economy focus by the South East Queensland Council of Mayors.



**6.7** Effective partnerships across all tiers of Government to create a competitive framework for sector growth which relies on leadership within each agency to take ownership of the actions.



### KEY.

- |   |  |  |
|---|--|--|
| Brisbane Marketing                      | Tourism and Events Queensland                              | Local Governments                            |
| South East Queensland Council of Mayors | Department of Innovation, and Tourism Industry Development | Queensland Tourism Industry Council          |
| Industry Partners                       | Other Agencies   | Lead / joint lead agency for that initiative |

# MEASURING SUCCESS.

The key to success in any vision, is to measure progress against clear goals around our global brand, sustainability and economic impact.

## The VE2031 Vision aims to:

- Increase awareness and engagement with the Brisbane Brand through positive consumer sentiment (reaching 64% positive by 2031);
- Increasing visitor dispersal across the region, reaching 40% of visitors exploring outside Brisbane City by 2031;
- Increase local satisfaction with the visitor economy from a net score of 43% to 48% (above the State average) by 2031;
- Increase the value of the visitor economy to \$16.5B per annum by 2031;
- Increase the average dwell time in the region to 3.2 days (0.5 days above 2018) by 2031;
- Support nearly 50,000 extra jobs by 2031;
- Increase visitor satisfaction with their experience, measured through the Consumer Sentiment Index; and
- Deliver benefits to the environment locally and globally through adoption of a global destination sustainability benchmark.

Additional research is needed to understand our current brand awareness, and our global ranking against other sustainable destinations.

Progress against the Visitor Economy 2031 Vision goals will be tracked annually and reflected in three-year action plans with short-term targets, reflecting the three-year target intervals outlined below.

These results can only be achieved through a partnership approach.

KEY PERFORMANCE INDICATORS	2018	2025	2031 TARGET
<b>GLOBAL BRAND</b>			
Brand Awareness	Benchmarking to occur in 2020		
Share of Australia's International Visitor Nights	10%	12%	13%
Consumer Sentiment Index	56%	59%	64%
<b>SUSTAINABILITY</b>			
Regional Visitor Dispersal (% of trips outside cities)	30%	34%	40%
Global Sustainable Destination Benchmark	Benchmarking to occur in 2020		
Net Positive Social Impact Score (TEQ Social Indicators)	43%	45%	48%
<b>ECONOMIC</b>			
Overnight Visitor Expenditure	\$7.8B	\$11.5B	\$16.5B
Average length of stay (day and overnight)	2.7	2.9	3.2
Spend per person / per day	\$132.00	\$178.40	\$232.80
Jobs (Tourism Satellite Account)	60,300	81,250	110,000



**BRISBANE MARKETING WOULD LIKE TO EXTEND ITS THANKS TO THE FOLLOWING ORGANISATIONS FOR PARTICIPATING IN THE DEVELOPMENT OF THE VE2031 VISION:**

Abbey Medieval Festival and Museum  
Accor Hotels  
Acknowledge Education  
Adagold Aviation  
Adina Apartment Hotel Brisbane  
Adventure Day Trips  
Adventure Moreton Island  
AHS Consulting  
Alcyone Hotel Residences  
Alt.vfx  
AMP Capital  
Any Road  
Archerfield Airport Corporation  
Aria Property Group  
Arkhefield  
Arts Queensland  
Arup  
ASF Properties Pty Ltd  
Asian Pacific Group  
Aurecon Australia Pty Ltd  
Austcham Hong Kong & Macau  
Austrade  
Australia China Business Council  
Australia Zoo  
Australian Catering Services  
Australian Child Care Career Options  
Axcen  
Baillie Lodges  
Barbossa Bar and Bottle Shop  
BDO Pty Ltd  
Black & White Cabs  
Black Card  
Blue Mount Capital  
Boggo Road Gaol Pty Ltd  
Booking.com  
Bray Management  
Brisbane Airport Corporation  
Brisbane Airport Hotel Group  
Brisbane Airtrain  
Brisbane City Council  
Brisbane City YHA  
Brisbane Convention & Exhibition Centre  
Brisbane Festival  
Brisbane Marketing Board  
Brisbane Marriott Hotel  
Brisbane Powerhouse  
Brisbane Racing Club  
Brisbane Riverview Hotel  
Brookfield Multiplex  
Business South Bank  
Capri by Fraser  
CAPTA Group  
Chalmers Partners  
City of Gold Coast  
City Parklands  
City Smart  
City Winery  
Climatexperience Brisbane  
Cluster Arts  
Colliers International  
Comfort Inn & Suites Robertson Gardens Brisbane  
Committee for Brisbane  
Cottee Parker Architects Pty Ltd  
Council of Mayors South East Queensland  
Cre8tive Property  
Cross River Rail Delivery Authority  
Customs House  
Damarcon  
Delaware North  
Delectable Tours  
Department of Environment and Science  
Department of Innovation, Tourism Industry  
Development, and the Commonwealth Games  
Department of State Development, Manufacturing,  
Infrastructure and Planning - Economic Development  
Queensland  
Destination Brisbane Consortium  
Dexus Property Group  
Di Marco Group  
Directors of the Extraordinary  
Eat Street Northshore  
Eatons Hill Hotel  
Ecotourism Australia  
Ecourban  
Edition Development Pte Ltd  
Electric Bike Tours  
Elite Helicopters  
Emporium Hotel South Bank  
Epicure at Brisbane City Hall  
Essence Apartments  
Ev Leap  
Expedia Group  
Fieldworx  
Floating Images Hot Air Balloon Flights  
Focus Pacific  
Founder At CABN  
Four Points by Sheraton Brisbane  
Gadens Lawyers  
Gainsdale  
G'day Adventure Tours  
Glamxperience  
Go Fish Australia  
Gold Coast Tourism Corporation  
Griffith University  
Healthy Land and Water  
Hilton Brisbane  
Hot Air Balloon  
Howard Smith Wharves  
Hyatt International - Asia Pacific, Limited  
IES College  
Inala Wangarra  
Inspiring Cities  
International River Foundation  
Ipswich City Council  
ISPT Pty Ltd  
Kindred Group  
Kokoda Capital Group  
KPMG  
Laureate Australia and New Zealand  
Limoso Luxury Transport  
Lockyer Valley Regional Council  
Logan City Council  
Lone Pine Koala Sanctuary  
Lord Mayor's Administration Office  
Loud Conferences and Events  
Manly Harbour Village  
Mantra South Bank  
MCI Australia  
Merlin Entertainment Group  
MG Investments  
Minor Hotels  
Mirimar Cruises  
Mitchell Ogilvie Menswear  
Moreton Bay Regional Council  
Moreton Bay Region Industry & Tourism  
Museum of Brisbane  
National Trust of Australia  
Next Hotels & Resorts  
Novotel Brisbane South Bank  
Ogilvy Brisbane  
Optus  
Orbitz Elevators  
O'Reilly's Rainforest Retreat  
Otto Ristorante  
Out There Cycling Brisbane Valley Rail Trail Tours  
Oxley Creek Transformation  
Pellicano  
Pico Play  
Place Design Group  
Port of Brisbane  
Prestige Day Tours  
Prime Square  
Property Council of Australia  
Pterodactyl Helicopters  
Pullman & Mercure Brisbane King George Square  
Punthill Brisbane  
Pure Projects  
Quandamooka Yoolooburrabee Aboriginal Corporation  
Queensland Art Gallery | Gallery of Modern Art  
Queensland Conventions and Incentives  
Queensland Hotels Association  
Queensland Maritime Museum Heritage Tours  
Queensland Maritime Museum  
Queensland Performing Arts Centre  
Queensland Tourism Industry Council  
Queensland Treasury  
Queensland Treasury Corporation  
Queensland University of Technology  
QueensPlaza  
Rarefish PR  
RDA Logan & Redlands  
Real Estate Institute  
Redland City Council  
Redlands Kayak Tours  
Regional Development Australia  
Restaurant and Catering Queensland  
River City Cruises  
Riverlife  
Riverside Marine  
Rockpool Dining Group  
Romeo  
Rousefell Design  
Royal International Convention Centre  
Royal on the Park  
Royal Queensland Golf Club  
RPS Group  
Running Stream  
Rydges South Bank Brisbane  
Scenic Rim Brewery  
Scenic Rim Regional Council  
Scouts Queensland  
Sealink  
Shakas Adventure Tours  
Shangri-La Hotels and Resorts  
Shayher Group  
Sirromet Winery  
Sofitel Brisbane Central  
Somerset Regional Council  
South Bank Corporation  
Sparrowly Group  
Spicers Retreats  
Spirits of the Red Sand  
Sports Analytics  
Stadiums Queensland  
Stamford Plaza Brisbane  
Star Entertainment Group  
Stokehouse Q  
Story Bridge Adventure Climb  
Straddie Kingfisher Tours  
Studio THI  
Summer Land Camels  
Sunlover Holidays  
Sunpac  
Sunshine Coast Regional Council  
Swiss-Belhotel Brisbane  
TAFE Queensland  
Talk of the Town Storytelling  
Tangalooma Island Resort  
The Calile Hotel  
The Charming Squire  
The Ginger Factory  
The Henderson Gallery  
The Park Hotel Brisbane  
The Sebel Brisbane  
The University of Queensland  
The Vino Bus  
The Westin Brisbane  
Think Fresh  
Three Plus  
Tourism & Transport Forum  
Tourism and Events Queensland  
Tourism Australia  
Tourism Noosa  
Trade and Investment Queensland  
Translink  
Treasury Brisbane  
TreeTop Challenge  
Twenty31 Consulting  
University of Southern Queensland  
Urban Futures Brisbane Board  
Urbanest  
Urbis  
Vicinity Centres  
Village Roadshow Theme Parks Pty Ltd  
Virgin Australia  
Walk Brisbane  
Walkabout Creek Adventures  
Walker Corporation  
Wallum Partners  
Wee Hur Capital  
Wheel of Brisbane  
Worldwide Hotels  
YHA Brisbane

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