

Queensland Tourism Industry Reference Panel

Towards 2032

Reshaping Queensland's visitor economy to welcome the world

A plan to deliver uniquely Queensland experiences in step with the needs of visitors, communities and the environment

JUNE 2022



Acknowledgement

We pay our respects to the Aboriginal and Torres Strait Islander ancestors of this land, their spirits and their legacy. The foundations laid by these ancestors—our First Australians—give strength, inspiration and courage to current and future generations, both Indigenous and non-Indigenous, towards creating a better Queensland.

We recognise it is our collective efforts and responsibility as individuals, communities and governments to ensure equality, recognition and advancement of Aboriginal and Torres Strait Islander Peoples (Indigenous) across all aspects of society and everyday life.

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Introduction from the Panel Chair

In March last year, the Queensland Government asked me to chair a Tourism Industry Reference Panel to consult industry and recommend ways to both speed the post-COVID-19 recovery and set up our visitor economy for long-term success.

It's fair to say that 'recovery' itself looks different to when we first convened as a Panel. While we have learned to live with COVID-19, new challenges have emerged: communities are rebuilding following recent flooding and all of us are adjusting to the reality of disrupted supply chains, skills shortages and a rising cost of living amid increased global uncertainty.

The panel heard much from industry, including that they wanted a tangible target for the state's visitor economy recovery. This plan responds, proposing that we have an aspirational goal of visitor expenditure of \$44 billion per annum by 2032. There was also overwhelming acknowledgement that we must do more than just grow – we must future-proof what we do.

Industry stakeholders told us they saw huge opportunities in our natural environment, culture, education, events and the development and promotion of regional destinations. They also noted a substantial need to refresh and evolve some of our core products. And that our visitor experience will need to be 'next level' to be a destination of choice for the next decade.

We can amplify what is uniquely Queensland: the Great Barrier Reef, Cape York and the Wet Tropics, rainforests and parks, one-million square kilometres of the Outback where dinosaurs roamed, two ancient Indigenous cultures, history and stories, islands, beaches, and our diverse towns and cities.

To do this, we must evolve our product and experiences, in the context of these amazing environments, to meet the contemporary needs of visitors, the environment and host communities. Our operators will need to be informed by data, assisted by technology and their experiences delivered by a capable, skilled and inspired workforce.

We will only succeed if we build resilience, operate sustainably – and with the support of local communities. That's why we are recommending that all future investment by the government and industry meet a balanced scorecard of outcomes – not just overnight visitor expenditure.

Other destinations are making plans and investing to improve their competitiveness. In this final plan, we have proposed a list of high impact initiatives (and related 'enablers') which we believe can change the game for visitation to our State.

We've been more specific about what's needed in the next 3–4 years in the belief that if we invest big, early, we will get compounding benefits. Conversely, if we drip-feed our restart and hobble out of the pandemic we would rely on a 'hockey stick' of growth, rarely achieved, to reach our targets.

We are recommending three substantive funds be established by government to turbocharge recovery and speed progress towards our goals.

Further, we've called out actions aimed at enabling efficient investment, skills and capability development, increased use of technology and data and new ways of working.

If government can get the settings right – and the private sector comes to the party – visitation will contribute billions each year in increased prosperity while also making a much bigger contribution to our environment, local communities and lifestyle.

Now is our chance to recalibrate and relaunch with fresh goals, catalysed by smart investment: it's time to be bold or be left behind.

Liz Savage, Panel Chair



Above: Rainforest walk on the Jindalpa boardwalk in the Daintree National Park, Tropical North Queensland © Tourism and Events Queensland
Left: Liz Savage addressing DestinationQ 2021 at the Brisbane Convention and Exhibition Centre

Developing our plan

In early 2021, the Queensland Government established the Tourism Industry Reference Panel to consider actions required and make recommendations to position Queensland’s visitor economy for success after COVID-19.

Panel members were chosen as experts in the visitor economy, based on their past and present industry participation in a broad range of roles: as investors, entrepreneurs and as leaders of corporate and government entities in tourism. Members included:

Liz Savage, Panel Chair, with 25 years experience in senior executive and non-executive Director roles in travel, tourism and hospitality. Liz is a full-time non-executive Director. Current directorships include at North Queensland Airports, Auckland Airport (New Zealand), FunLab, PeopleIn and Intrepid Travel.

Brett Godfrey, having had a 25-year career in the aviation industry, including conceptualising, establishing, and leading – Virgin Australia for its first 10 years. Brett is the Founder and Managing Director of TB2 Capital, which owns and manages a portfolio of tourism assets, including Noosa’s Makepeace Island. Brett’s direct ownership interests include the Tasmanian Walking Company. Brett is the Chair of Tourism and Events Queensland, a Board Member of the Australian Rugby Foundation and a Board Director of Rugby Australia.

John O’Neill, a former Managing Director of Tourism New South Wales (NSW) (now Destination NSW), a non-executive Director of Sydney Convention and Visitors’ Bureau (now Business Events Sydney) and was Ticketing Communications Manager for the Sydney 2000 Olympic Games. He is the Founder and Managing Director of Komosion, a boutique management consultancy, Chairman of Surfing NSW and Ambassador for Adopt Change.

With input from Andrew McEvoy former Managing Director and Chief Executive Officer of Tourism Australia.

The panel has implemented protocols to manage any perceived conflicts of interest in accordance with independent advice sought on the panel’s behalf by the Department of Tourism, Innovation and Sport (DTIS).



Snorkelling at Hardy Reef, from the Cruise Whitsundays pontoon, Whitsundays / © Tourism and Events Queensland

Context



Following extensive industry engagement the Panel released an Interim Action Plan for Tourism Recovery in October 2021.

The interim plan outlined:

- 1. what we heard on the ground across Queensland;
- 2. the challenges we face and the opportunities available to drive long-term growth; as well as
- 3. recommended actions to address the immediate needs of industry following the borders re-opening and during early recovery.

This included a 100-day plan that the Queensland Government adopted and progressed urgently with substantive funding committed to aviation attraction and business events. Progress has been made against 27 immediate actions.

Since then, the panel has commissioned new research and expert input to create this Final Plan. Our plan aligns in all key respects with the Australian Government’s *THRIVE 2030: A national strategy for Australia’s visitor economy recovery and return to sustainable growth*.

Further information about the panel members, including their current roles and interests is available online at: www.dtis.qld.gov.au/tourism/tourism-industry-reference-panel

01

Queensland's visitor experience reimagined

During extensive consultations we discovered that industry stakeholders were remarkably aligned in their aspirations for Queensland's visitor experience.

Vision

By 2032 Queensland will be Australia's destination of choice for domestic and global visitors seeking the world's best experiences.

Mission

We'll encourage people to visit again and again by remaining 'cutting-edge relevant' – continuously reimagining and reinventing our offering for the benefit of visitors, our communities and the environment.



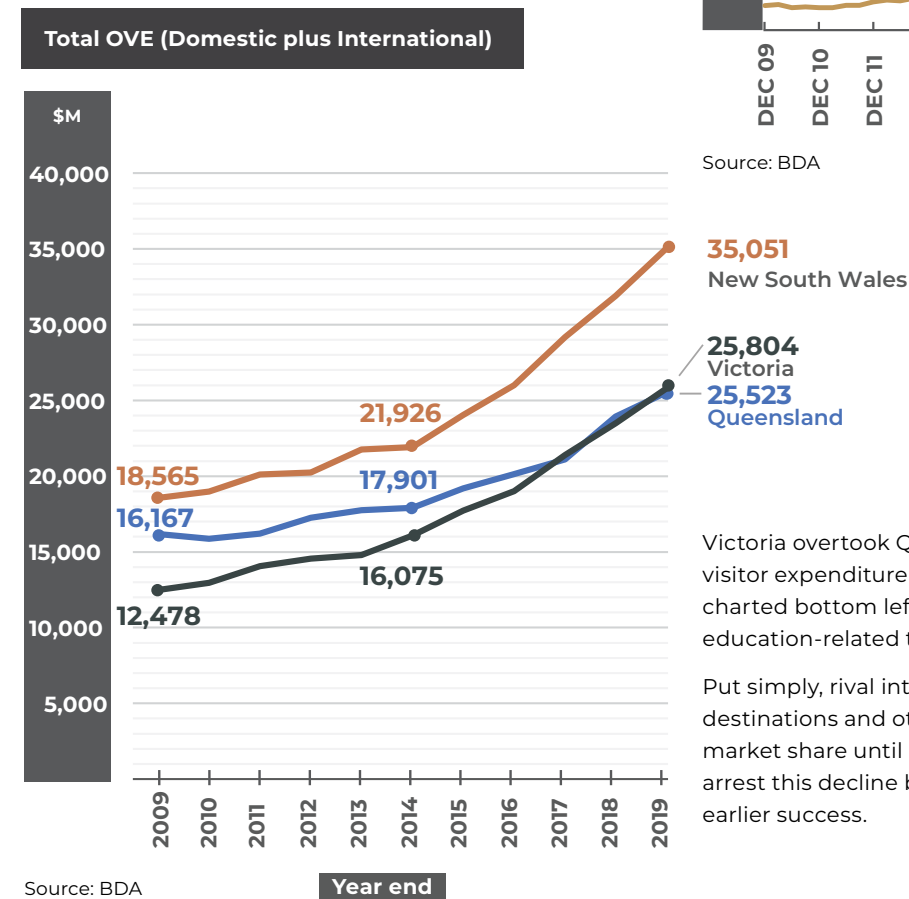
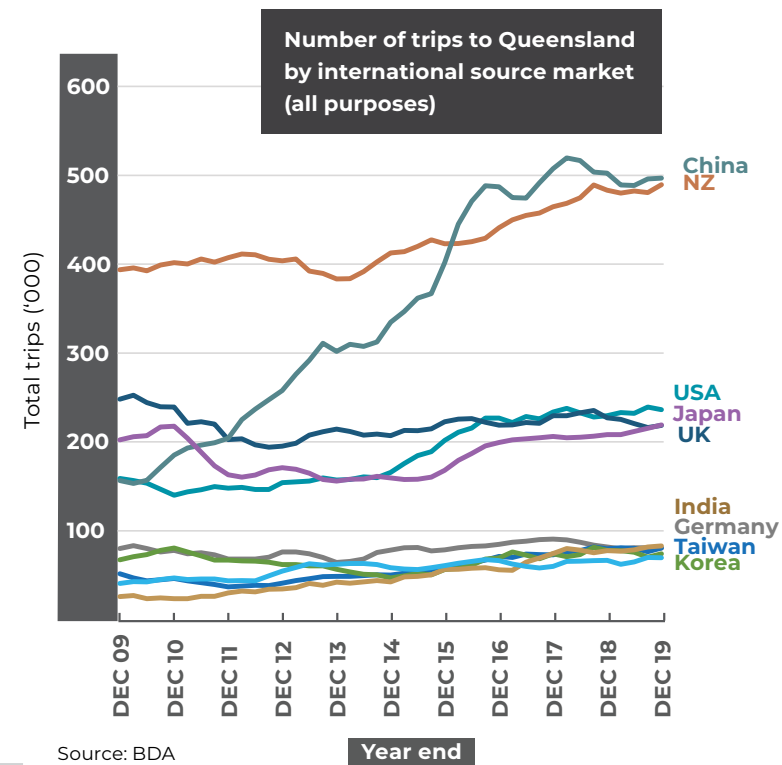
02

Our growth goal

During the first half of the decade to 2019, Queensland lost market share to overseas beach competitors such as Bali, Thailand, Hawaii and Fiji. This was largely because of the increased availability of cheap, short-haul international airfares, good-value accommodation and comparatively good service in these destinations.

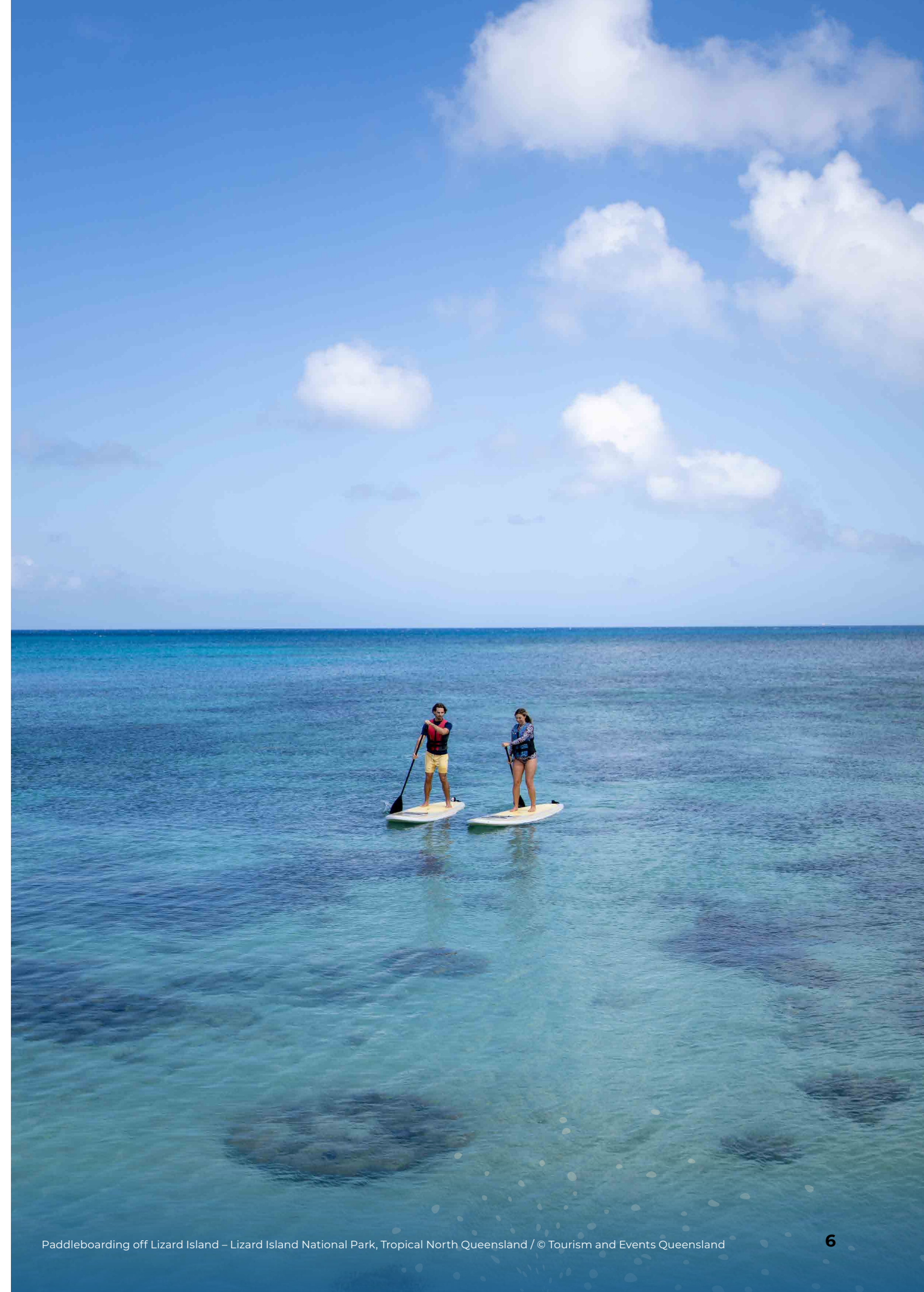
Our state was exposed to an overall decline in travel by families and we suffered our biggest market share losses in holiday demand on the Gold Coast and in Tropical North Queensland.

Our share of international trips and spend also declined quite steadily. China had shown most growth in trips for Queensland over the decade but as charted top right, there has been minimal growth since 2016.



Victoria overtook Queensland in total overnight visitor expenditure for the first time in 2019, as charted bottom left, having benefited from growth in education-related travel.

Put simply, rival international beach holiday destinations and other Australian states eroded our market share until it stabilised in 2015. We were able to arrest this decline but have so far failed to match our earlier success.



In our consultations, industry called for an ambitious recovery and growth target. In response, the panel engaged specialist tourism demand forecasting firm BDA to model two primary growth scenarios through to 2032 incorporating both domestic and international visitation:

1. Maintain 2019 Share through to 2032 – low-growth scenario.

We recover our market share as it stood in 2019 by 2023 and maintain it through to 2032, assuming an ongoing decline in growth from China; and

2. Restore and maintain Peak Share through to 2032 – high-growth-scenario.

We restore our peak market share from the decade leading up to 2019 by 2023 and maintain it through to 2032 – our higher growth scenario, assuming a restoration of high growth from China.



2021 NRL Grand Final at Suncorp Stadium

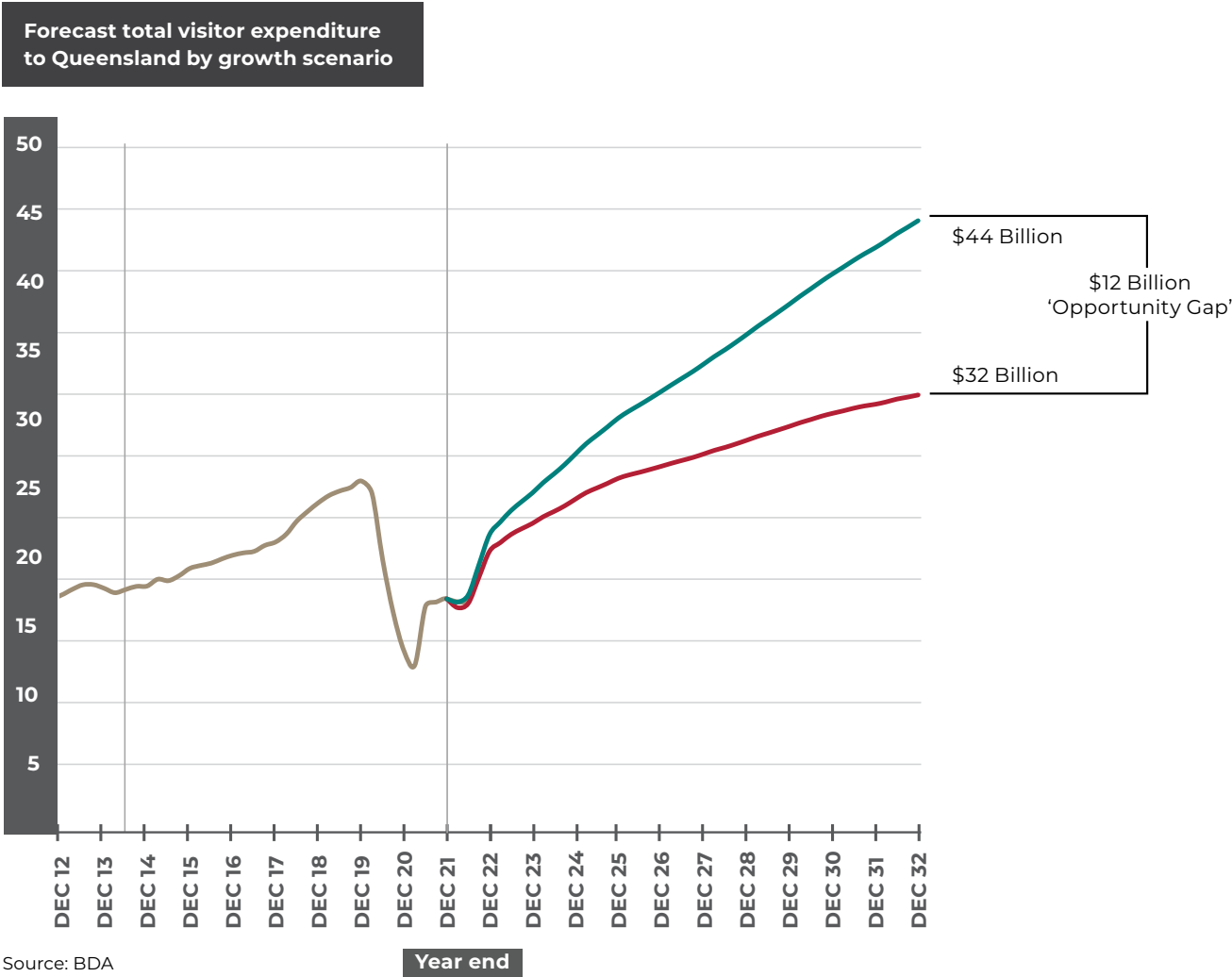
If we can achieve a trajectory following the high-growth scenario, overnight visitor expenditure from both domestic and international visitors will generate an estimated \$34 billion per annum by 2027 and \$44 billion in overnight visitor expenditure per annum by 2032. We therefore propose these expenditure figures be adopted as our aspirational growth goals for Queensland's visitor economy.

In doing so, it's important to note several material factors. Achieving expenditure towards the upper end of the range will likely require:

- at least arresting the declining share of international demand;
- building on recent improved interstate competitive performance to gain share moving forward; and
- maintaining (as much as possible) the recent momentum in intrastate travel.

The assumed contribution to total visitor expenditure of international visitors from China to total spend is substantial in the modelled scenarios accounting for \$3.4 billion of the \$44 billion high-growth scenario and \$2.7 billion of the \$32 billion low-growth scenario. At the time of writing, there remained significant uncertainty about when visitation by Chinese to Australia may resume and what level of demand will result.

The adoption of the higher growth scenario therefore implies that any shortfall on visitation modelled from China would need to be made up from other markets, including potentially capturing an even greater share of pent-up domestic demand (and savings, estimated at \$270 billion at the time of writing).





Mooloolaba Triathlon 2020 / © Tourism and Events Queensland

2.1 New measures of success

What we now refer to as the visitor economy was originally narrowly conceived as 'tourism' and thought about primarily as a network of transport and accommodation through which industry would get as many people to spend as much money as possible.

Our primary measure of success for the visitor economy continues to be expenditure. It's an important proxy for jobs and income, but it's a blunt measurement that excludes community and environmental impacts – nor does it explicitly consider the customer experience.

“Most tourism, by its nature, involves the destination as a whole, not only industry businesses, but also its ecosystems, natural resources, cultural assets and traditions, communities, aesthetics, and built infrastructure.”

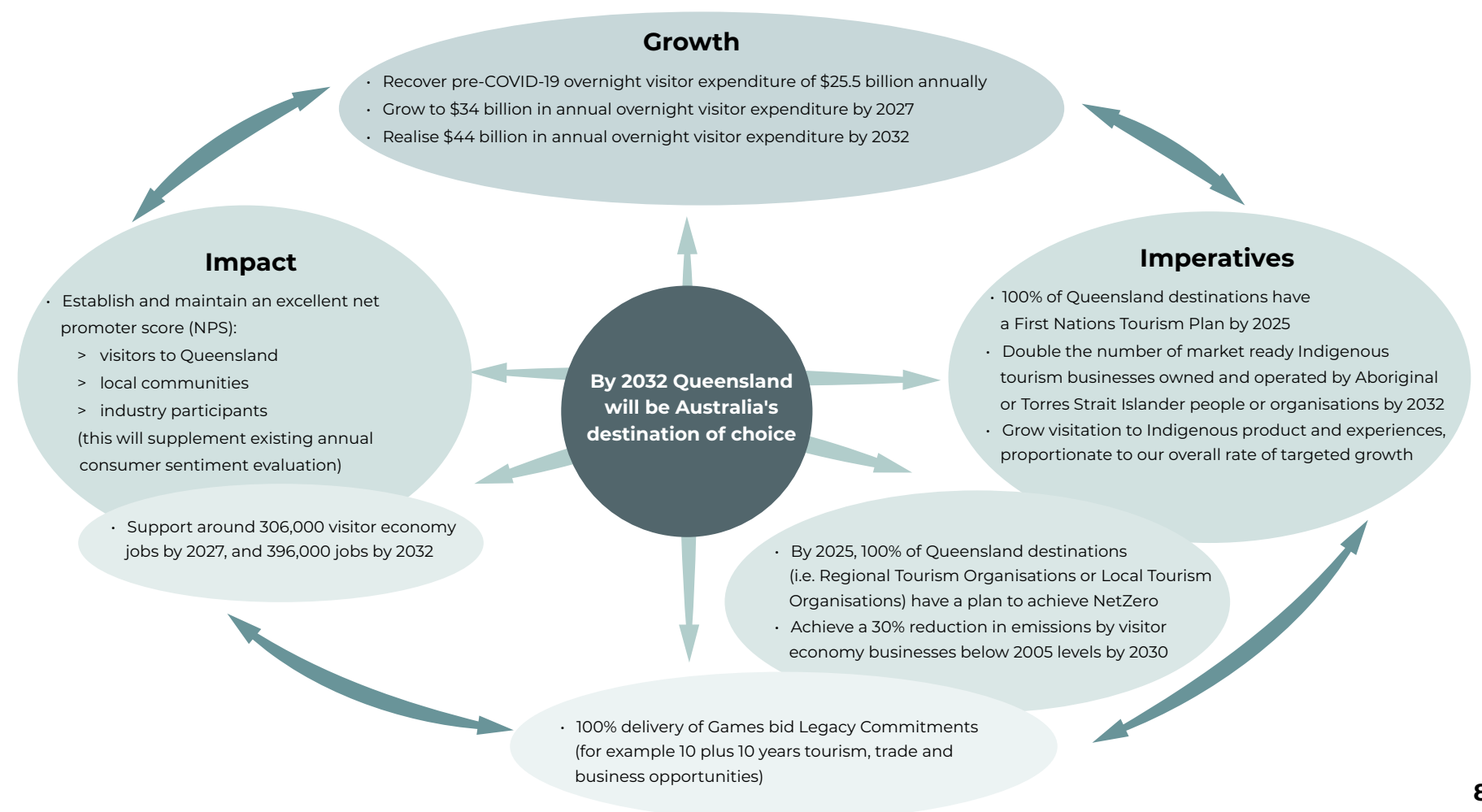
- The Future of Tourism, a global coalition of non-government organisations

2.1.1 Goals to focus our collective effort

We recommend the adoption of a balanced scorecard of goals and measures to guide our collective actions and behaviour. The following are illustrative and we expect they will be refined in collaboration between government, industry and community stakeholders.

We now recognise a more complex ecosystem, both economically and socially, open to an ever-wider array of participants courtesy of digital technology and dependent on the health of the environments in which we operate. We've had a change in mindset and now we need a change in measurement.

Goals to focus our collective effort



03

Queensland's natural advantage

Queensland's beaches, hinterlands, rainforests, the Outback and the Great Barrier Reef are the bedrocks on which our visitor economy has been built. And our urban environments blend development with lifestyle amenity that allows residents and visitors alike to make the most of our climate.

Put simply, Queensland has a natural advantage.

In addition to the world's largest reef system, our state hosts more than 200 national parks and five UNESCO World Heritage sites, including the world-famous Daintree Rainforest, K'gari (Fraser Island), the Great Barrier Reef, Gondwana and the Australian Fossil Mammal Sites at Riversleigh. Queensland is the most biodiverse state in Australia.



14.2 million hectares
of national parks and protected areas



Queensland's mainland coastline runs for
6900km+



2.5 million hectares +
are managed by, or in partnership with,
First Nations peoples.

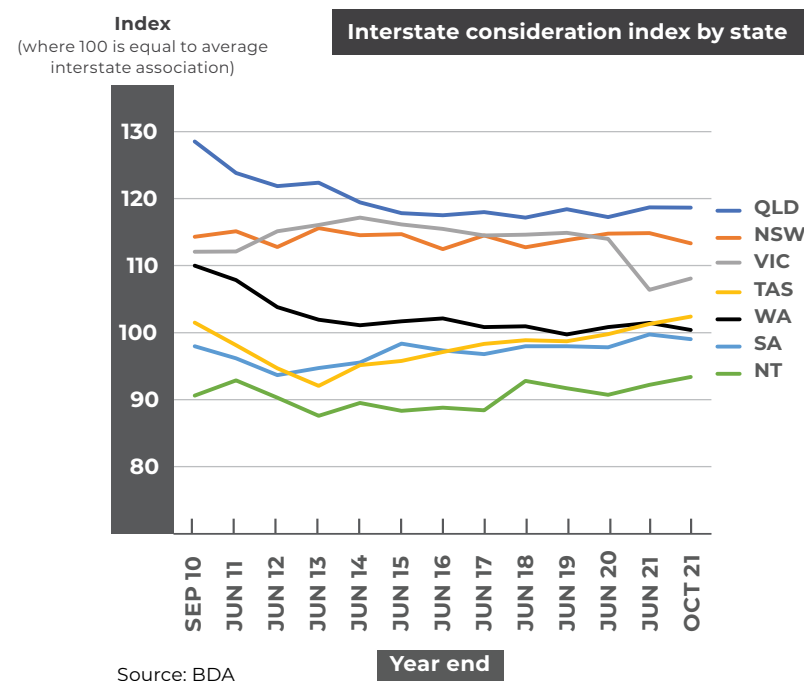


2000 islands
with hundreds located within the
Great Barrier Reef.



3.1 We have what Australians – and the world – value most

Queensland has what Australian and international visitors want, as shown by high rates of intention to visit among our key domestic and international audiences.



What it will be like in 2032

Queensland will be world-renowned for life-changing experiences that sustain, enhance and regenerate our environment and authentically immerse visitors in our Indigenous cultures and tropical lifestyle.

We asked BDA to review 'travel importance factors' for Australians and international visitors as part of our analysis. As at October 2021, Queensland ranked above the Australian interstate average for many of the most important associations, including:

1. Coastal and beach experiences;
2. A great place for touring;
3. Availability of premium accommodation;
4. A family destination; and
5. A world-class natural setting.

“Queensland is the most biodiverse state in Australia with respect to fauna”

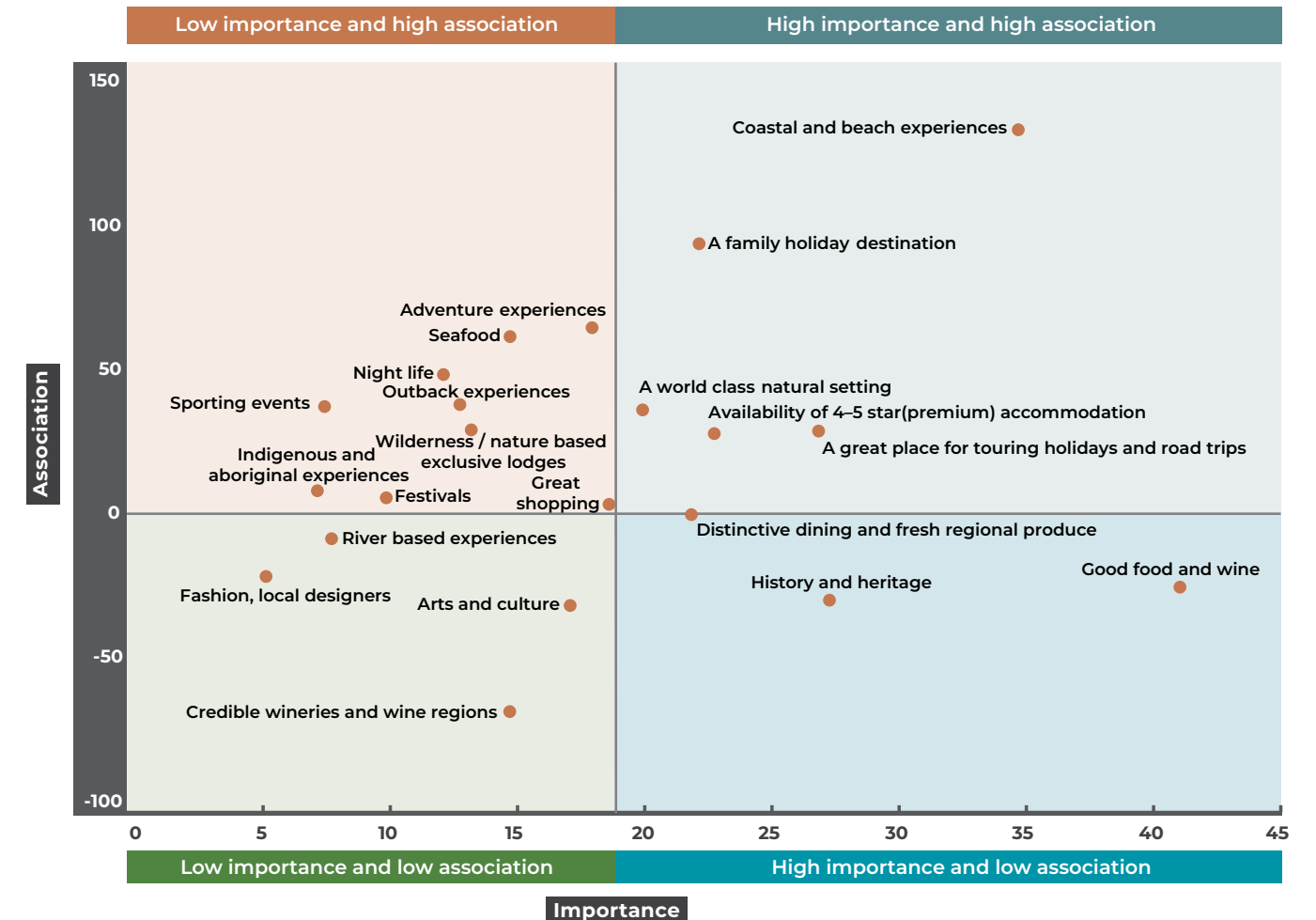
- Professor Hugh Possingham, Queensland's Chief Scientist

Internationally, the available research ranked “holiday importance factors” for Australia, rather than Queensland. Safety was the most important in most markets, although world-class nature and wildlife was the leading factor for visitors from Korea, China, India and Germany.

Good food and wine were prominent across many markets while aquatic and coastal experiences were in the top 5 factors for visitor from China and India.

The research further evidenced what we heard from industry during consultation: we have strong latent appeal – and there are opportunities for improvement.

Holiday factors by importance and by association with Queensland (for domestic leisure travellers, non-Queensland residents)





3.2 We must develop cutting-edge relevant products and experiences

What it will be like in 2032

Australians in other states, eager not to miss out, will be planning their next stay having heard about our stream of new beach, dining, adventure and nature-based experiences.

Industry told us that visitors are increasingly seeking out experiences that create life-long memories and help shape or reinforce their sense of identity – trends that have been accelerated by COVID-19. We believe experience development will be the core platform for Queensland’s future growth.

As noted earlier, our opportunities include nature-based tourism which Tourism and Events Queensland reports was growing at 14% per year on average over the three years to December 2019. Market analysts, including Allied Market Research, forecast adventure tourism, estimated to be worth \$112 billion globally in 2020 is now projected to be worth 10x that in 2028 or \$1.2 trillion.

Despite this trend, Australia has fallen behind, ranking 10th, behind New Zealand (4th) and Canada (7th) in the latest Adventure Tourism Development Index and, in Queensland, we are far from making the most of this opportunity – although our competitor destinations are catching on.

Western Australia recently announced the establishment of eight ‘shovel-ready’ sites in national parks in preparation for private investment, including eco retreat accommodation, and significant investment in existing trails and attractions to create bookable touring options for locals, interstate and international visitors.

“Queensland has such amazing natural assets: you’ve got the Great Barrier Reef, world-renowned beaches, World Heritage-listed rainforest, all the cool experiences, dining and local produce. People do want to get away. They want open spaces, they want to look after their minds and their bodies and give back to the planet.”

- Patricia O’Callaghan, CEO, Destination Gold Coast

BDA’s research for the panel also identified experiences of high importance to Australian travellers with which Queensland has a low association, including:

1. Good food and wine;
2. History and heritage;
3. Distinctive dining and fresh regional produce;
4. Great shopping; and
5. Arts and culture.

These insights, consistent with what we heard from industry during consultation, signpost where investment should be directed. We will need to invest in new experiences that are authentic, uniquely Queensland and ‘cutting-edge relevant’ if we are to successfully compete.

Industry also told us that our core, built assets need investment and improvement to better support the visitor experience. This included a need to refresh our accommodation stock, add accommodation capacity, accelerate the development of in-destination visitor amenities, improve transport infrastructure and uplift the visual presentation of many destinations.

3.3 International diversification

Queensland has already begun to enjoy the global spotlight which comes from being designated host of the Brisbane 2032 Olympic and Paralympic Games.

We can leverage the so-called 'green and gold runway' through to 2032, using the convening power of sport to build and deepen international relationships, including for tourism, aviation attraction, education and business and major events.

BDA's modelling found that we will require an additional 3.1 million international airline seats over and above the 2019 supply by 2032 to support our Visitor Growth Goal. There is a significant supply gap to be addressed.

There are, however, some short-term headwinds about which we need to be realistic. The International Air Transport Association (IATA) has forecast that traffic levels in the Asia-Pacific for 2022 will only be around 11% of 2019 levels. Airline forward schedules for international inbound to Queensland were at 37.3% of 2019 volumes in June 2022. This compares with the global marketplace which looks closer to 60–70% of 2019 levels for the same period.

And even once international travel properly returns, it looks probable that carbon costs – including carbon offsets and the adoption of Sustainable Aviation Fuel (SAFs) – will make ultra-long-haul destinations relatively more expensive.

For these reasons, even in the mid to long term, our biggest growth opportunities will likely remain source markets closer to home.

China has been an incredibly important market for Queensland but, as noted, there is uncertainty about how, when and to what degree Chinese demand will return post-COVID-19.

In our consultations, industry recognised the broader opportunity of further unlocking demand from the growing middle class in Asian economies. BDA's analysis highlighted that India, along with China, was one of the world's fastest-growing outbound travel markets pre-COVID-19.

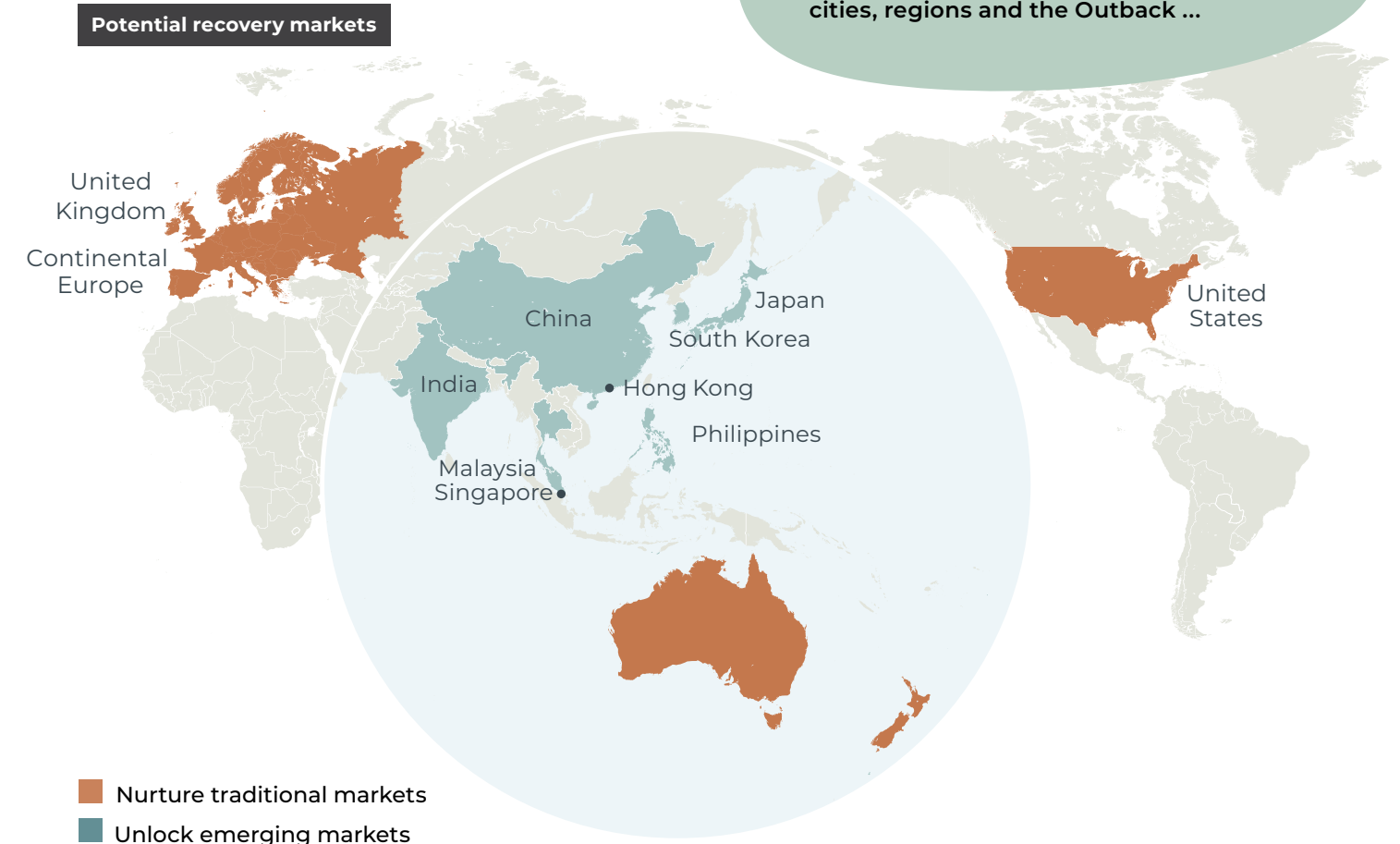
There is opportunity to work with Commonwealth Government agencies and industry to leverage our unique position as 2032 Olympic Games host to deepen relationships with key countries, including India with whom Australia recently entered into an Comprehensive Economic Cooperation Agreement.

Pre-COVID-19, there had also been significant growth in outbound travel across Asia, including from South Korea, Singapore, Malaysia, Japan, Indonesia and the Philippines.

So while we must make the most of any future demand from China and nurture the traditional UK, European and US markets, we need to speed our diversification, investing in attracting visitors from these new international source markets.

What it will be like in 2032

Visitors will fly directly from Asia, Europe and the Americas and will enliven our cities, regions and the Outback ...



Evolving technology

A shift by airlines to purchase more fuel-efficient, single-aisle narrow-body aircraft – which have an expanded range of between five and eight-hours' flying time – will open up more point-to-point and secondary city pairs at a time when travellers are likely to prefer shorter haul travel.

This provides a particular opportunity for Queensland given the dispersed nature of our state, our four international airports, our relative northern location in Australia and our proximity to Asian high-growth cities.

On the demand side of the equation, we will need to ensure international education and training, which prior to the pandemic emerged as Queensland's largest services export category, is in clear focus:

- International student enrolments at Queensland universities grew by 40% in cumulative terms in the decade to 2019, reaching a record high of 144,900 enrolments. International student enrolments in Vocational Education and Training across the state also grew by 24% in the decade to 2019.
- However, based on International Visitor Surveys, Queensland lost one percentage point of market share in education overnight visitor expenditure from 15.8% in the year ended December 2009 to 14.8% in the year ended December 2019.
- The pandemic then effectively closed Australia to international students.
- While many Queensland universities and education providers moved quickly to keep students engaged online, the loss in market share to competitors such as the UK and North America makes the task of re-building that much harder and is expected to take several enrolment cycles to restore to previous demand.



3.4 A huge opportunity close to home

Even prior to the pandemic, 76% of visitor expenditure flowed from domestic (including intrastate) visitors. And roughly 85% of interstate trips to Queensland came from New South Wales (NSW) and Victoria.

The restricted borders during COVID-19 provided a unique demonstration of the potential strength and vibrancy of the Australian domestic travel market, albeit that these conditions yielded a 'captive audience' for much of the period.

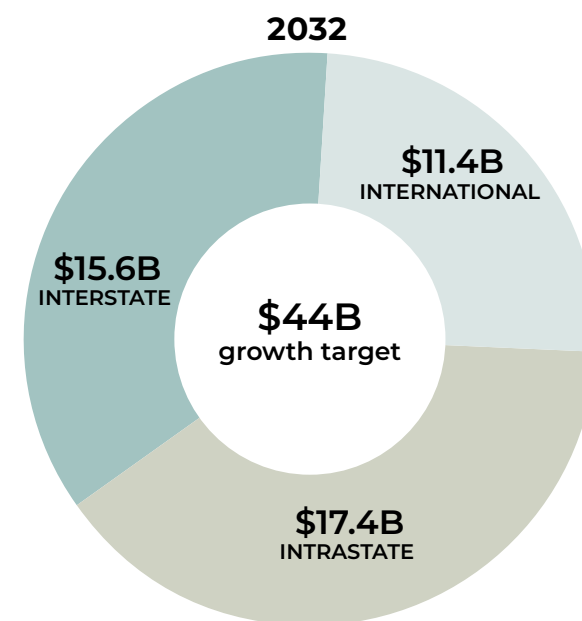
Throughout the pandemic, Queensland has performed better than most. In the year ending December 2021, Queensland topped all Australian states, including NSW and Victoria, with \$16.9 billion in annual visitor expenditure – noting, of course, that NSW and Victoria were in intermittent lockdowns during this period.

And although we've moved into an inflationary environment with increasing cost-of-living concerns and interest rate rises, Australian households still had more than circa \$270 billion in accumulated savings because of the multi-year COVID-19. But we'll need to convert interest and intention to visitation via:

1. Bolstering domestic destination marketing which, combined with the application of data, insights and forecasting, should produce strong returns on future marketing investment;
2. Leveraging our uniquely suited accommodation stock, great climate and beautiful destinations and relaxed culture to entice many Australians who, post-COVID-19, are now afforded the realistic opportunity to work from anywhere, meaning they have the potential for longer and more frequent stays; and
3. Continuing to develop our calendar of events, including both home grown and procured, acknowledging the proven role they play in attracting domestic visitors and dispersal across our state.

The case is compelling: we should continue to invest in securing and developing our domestic source markets as a priority for the coming decade, not just during the early COVID-19 recovery phase.

Forecast total visitor expenditure to Queensland by market segment



Interstate migration

COVID-19 has seen remarkable interstate migration to Queensland. In the year to June 2021, net interstate migration to Queensland was 30,939 – more than 90% of net interstate migration within Australia.

We should encourage these new residents to explore their 'backyard', boosting intrastate tourism.

What it will be like in 2032

Visitors will be wowed by our use of technology to share our stories and bring our history and culture to life.

04

The top 10 ways we can change the game

1 Reimagine our coast, beach and island offering

While we can't compete on labour costs against island and beach destinations in developing countries, we have a comparative advantage drawn from our wealth, giving rise to a first-class transport network, medical facilities, and the safety and certainty arising from our rule of law. We are a safe destination in which to experiment and innovate.

We need to reimagine the beach holiday. This will take many forms and we must build on local culture and the natural assets of the beach and its surroundings to bring the coast to life. We should create incentives for the private sector to support projects which bring new life and commercial opportunity to beach, coastal and island precincts.

What success might look like:

Beach

- The essentials taken care of – amenity, parking and access infrastructure
- Experience 'layering' - integrating cultural, arts and dining beach side
- Activation with events – for example, pop-up beach bar for the Noosa Surfing Festival.

Coastal

- Tours and itineraries
- New ways to explore coast and waterways – for example:
 - Stand-up paddleboarding (SUP)
 - Safaris at Fraser Island
 - Prawns and Paddle at Riverlife in Brisbane
- New products:
 - Brisbane to Moreton Bay and islands
 - Tour boat experiences and transport
 - Underwater art installations, such as the Museum of Underwater Art near Townsville
 - Art Trails in the Whitsundays region
 - Reef Suites on the Great Barrier Reef - the first underwater hotel stay.

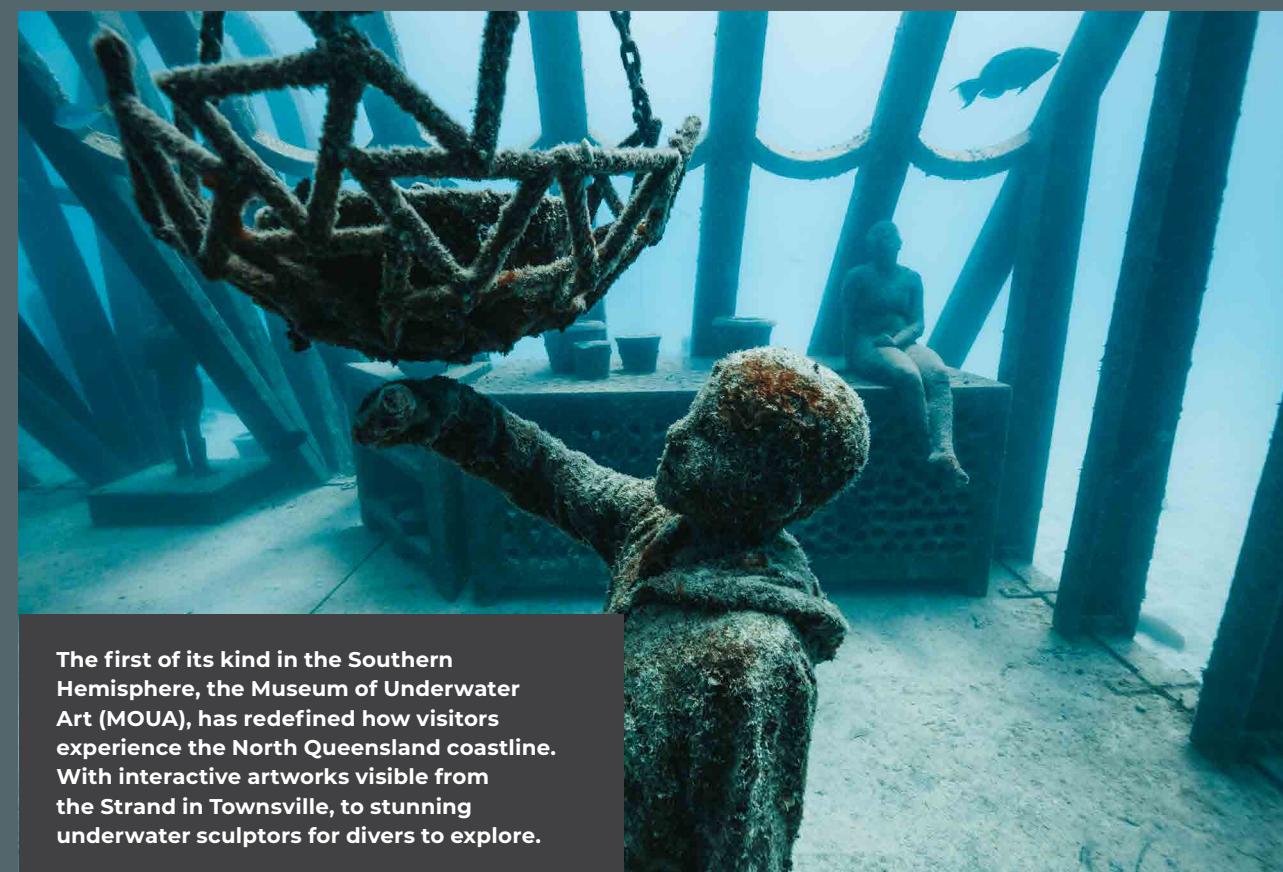
Islands

- Renewed interest from private investors - balancing affordable access with a range of price points
- Refreshed in a way that is resilient to weather shocks.



The City Beach Bar Trial on the Gold Coast, brought day beds, sun lounges and a licenced bar and kitchen to Kurrawa Beach, demonstrating what might be possible at selected locations in the future.

Kurrawa Beach Club / © LR Photography



The first of its kind in the Southern Hemisphere, the Museum of Underwater Art (MOUA), has redefined how visitors experience the North Queensland coastline. With interactive artworks visible from the Strand in Townsville, to stunning underwater sculptors for divers to explore.

Museum of Underwater Art (MOUA), Townsville / © Tourism and Events Queensland

2 Enhance our appeal to families, couples and students

BDA's research has shown that over the past decade family groups have accounted for a lower share of visitors to Queensland and backpackers are travelling elsewhere – segments that have been core to Queensland's market share.

We need to consider how a destination like the Gold Coast, for example, with existing tailor-made infrastructure for families, could own more of the market and entice families to repeat visit. Is it time that Gold Coast, for instance, becomes home for an anchor attraction? We think this is worthy of exploration: there would likely be significant benefit to existing operators from the addition of a new anchor attraction as such a powerful drawcard.

We also need to become more relevant to couples and other travellers by offering contemporary and compelling destination experiences that match their expectations. This includes layering a range of thoughtful cultural, food and beverage, technological and regenerative experiences alongside our natural and urban environments.

The panel heard repeatedly from industry that people with a disability are seeking, and should expect, accessible tourism experiences that meet their needs. The Queensland Government's audit into the accessibility of the state's tourism offerings will provide important insight to get this right. Immersive workshops that place industry and government staff and decision-makers in the 'shoes' of people living with disability are also helping to improve understanding and design capability.

Our destinations must meet other, less obvious visitor needs. For example, international students' motivations are different from those of leisure visitors. The Higher Education sector told us that decisions made by international students (and their influential parents) are driven by a combination of the destination lifestyle and future employment possibilities as well as the reputation of specific educational institutions, so it's important that these factors form part of our visitor attraction strategy.

Events will also play a crucial role in enhancing our appeal to families, couples and students.



Integrated resorts like Atlantis in Dubai are iconic entertainment offerings that are globally recognised. They offer a complete 'day through to night' experience with a range of activities suitable for visitors of all ages.

3 Deliver tech-wonderment

Technology is being deployed by innovative operators, artists and storytellers to create immersive experiences the world over. Technologies like augmented-reality, virtual-reality, 3D displays and sound projection, spatial sensing, and speech recognition treadmills are displaying destinations ('try before you buy') and inspiring wonder and amazement.

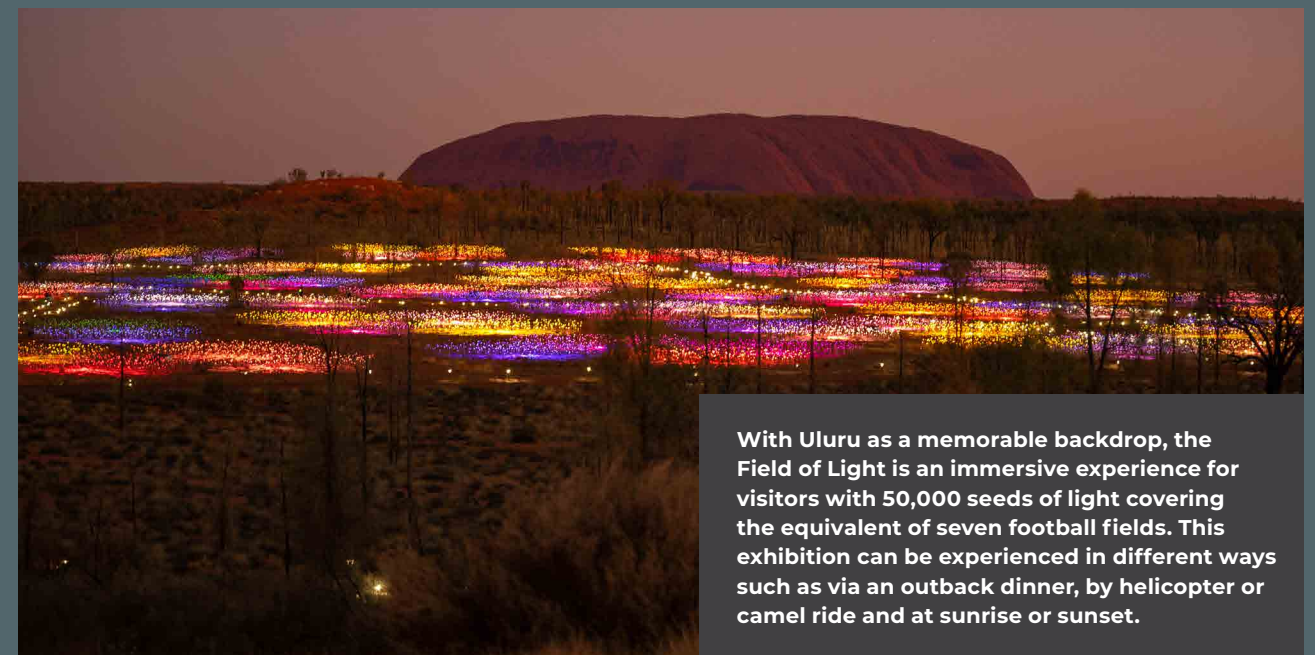
The Opening Ceremony at the Tokyo Olympic Games in 2021 demonstrated what is now possible.

We need to benchmark global best practice and identify opportunities to deploy technology in visitor experiences, including engaging local leaders in this space and through innovative technology company partnerships.



The Australian Stockman's Hall of Fame in Longreach has developed an immersive cinematic experience, blending old and new, real and virtual footage across a 16-metre screen. Telling the story and daily life of an Australian stockman by engaging all the senses.

Australian Stockman's Hall of Fame and Outback Heritage Centre, Longreach / © Tourism and Events Queensland



With Uluru as a memorable backdrop, the Field of Light is an immersive experience for visitors with 50,000 seeds of light covering the equivalent of seven football fields. This exhibition can be experienced in different ways such as via an outback dinner, by helicopter or camel ride and at sunrise or sunset.

4 Create more touring opportunities

We need to activate opportunities that drive visitor dispersal to realise Queensland's regional tourism potential.

Queensland's mainland coast spans almost 7,000 kilometres – it's longer than the California coastline. And the Outback, as defined by the boundaries of its regional tourism organisation, covers an area of one million square kilometres. It's a diverse and distinct region covering more than two-thirds of the area of the state. This vast scale, while an impediment to the unfamiliar or time poor, creates an opportunity for curated and guided touring itineraries delivered via a range of transport modes.

During consultation, we heard about innovative ideas for an Indigenous guided tour by train following the great whale migration, an Indigenous arts trail through the Cape communities and opportunities for green itineraries following Queensland's Electric Super Highway across our state.

Each of these concepts is compelling but we need a new drive tourism strategy to coordinate and prioritise the opportunities and to build on existing initiatives.



In 2021, the Queensland Music Festival organisation brought its 'music festival meets road trip' concept to life in outback Queensland. The highly successful Outback Trail married the best of Queensland's southern outback locations and outdoor venues with live music. Despite COVID-19 restrictions, the trail met sales targets and delivered \$4.6 million in regional economic impact.

5 Own tropical and marine adventure

The rapid growth in nature-based tourism and related adventure activities presents a substantial opportunity for Queensland destinations to create new experiences that are authentic, uniquely Queensland and 'cutting-edge relevant'

Momentum is already building. Tropical North Queensland has developed a vision to become the adventure capital of Australia. It is a mantle which Queensland as a whole could own and support – each destination in Queensland could own its own, distinctive adventure offering.

Cairns has established a mountain bike rainforest trail system and Mackay has plans to establish a 100km mountain bike trail in the picturesque Pioneer Valley. The Sunshine Coast is also seeking to grow in cycling tourism, the Gold Coast sees opportunity in the space by activating the hinterland.

The Great Barrier Reef offers a globally unique backdrop for adventure and exploration experiences, delivered sustainably.



Later this year (October 2022), Cairns will host the third leg of the Crankworx World Tour - as the only place in the world where riders can traverse two World Heritage areas. Crankworx will bring 1,200 athletes, 220 volunteers and an expected 34,000 spectators to Cairns.

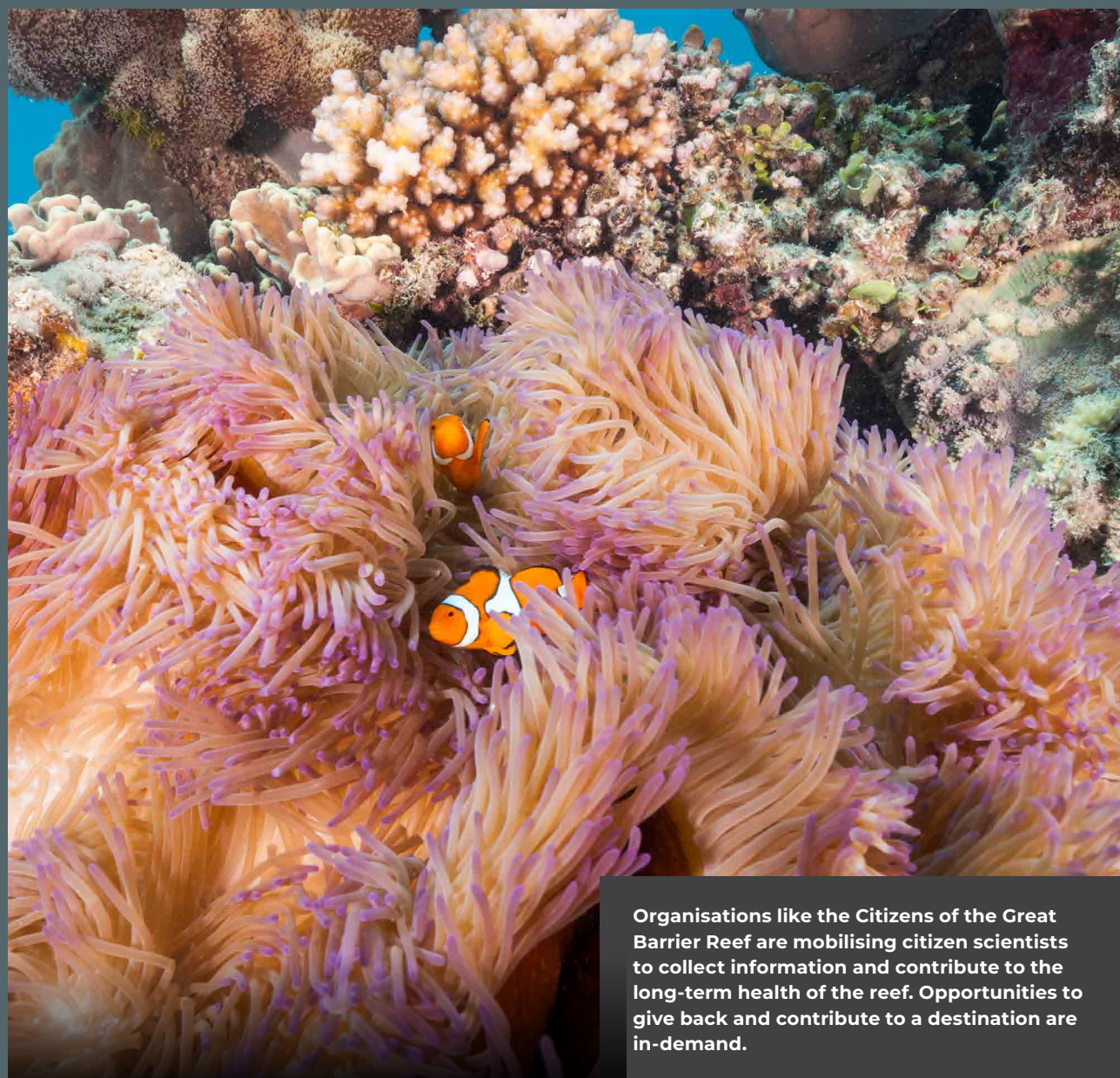
6 Become a regenerative tourism leader

Many environmentally aware visitors have moved from wanting their travel to 'leave no trace' to wanting to leave destinations they visit 'better than before' – so-called regenerative tourism. It's the antithesis of over-tourism.

By visiting, and in some cases by paying access fees or undertaking work as part of their experience, many visitors are providing the means and the labour to protect and regenerate our natural environments.

This is already occurring in iconic destinations like the Great Barrier Reef and the Daintree Rainforest where there are opportunities for 'citizen science' and 'voluntourism'. There is an array of other Queensland destinations which could offer new, meaningful and memorable regenerative experiences to visitors.

There is an opportunity to better connect the dots and leverage this as a tourism industry to get visitors authentically engaged, participating and regenerating, resulting in an enduring deep connection with our destination.



Organisations like the Citizens of the Great Barrier Reef are mobilising citizen scientists to collect information and contribute to the long-term health of the reef. Opportunities to give back and contribute to a destination are in-demand.



Tourism Tropical North Queensland's *see great leave greater* campaign is built on the promise of a regenerative tourism experience – "where every visitor leave as a custodian of the region and its unique stories".

7 Refresh and develop our places to stay

Improving the supply (both quantity and quality) of accommodation needs to be a priority focus. According to BDA's research, Queensland had an overall occupancy rate of 69% in 2019, one of the lower rates in Australia. We need to evolve our accommodation stock to ensure supply and quality meets future traveller demand.

The pandemic has also mainstreamed the 'work-from-anywhere' world. There is now more opportunity to blend business travel and leisure

('bleisure'). Airbnb told the panel that the average length of stay in its properties is increasing and that long-stays of 14 days and over were its fastest-growing segment.

BDA's modelling estimated 34,854 new hotel rooms will be required to meet our 2032 Visitor Growth Target of \$44 billion in overnight visitor expenditure, assuming a 75% occupancy rate.



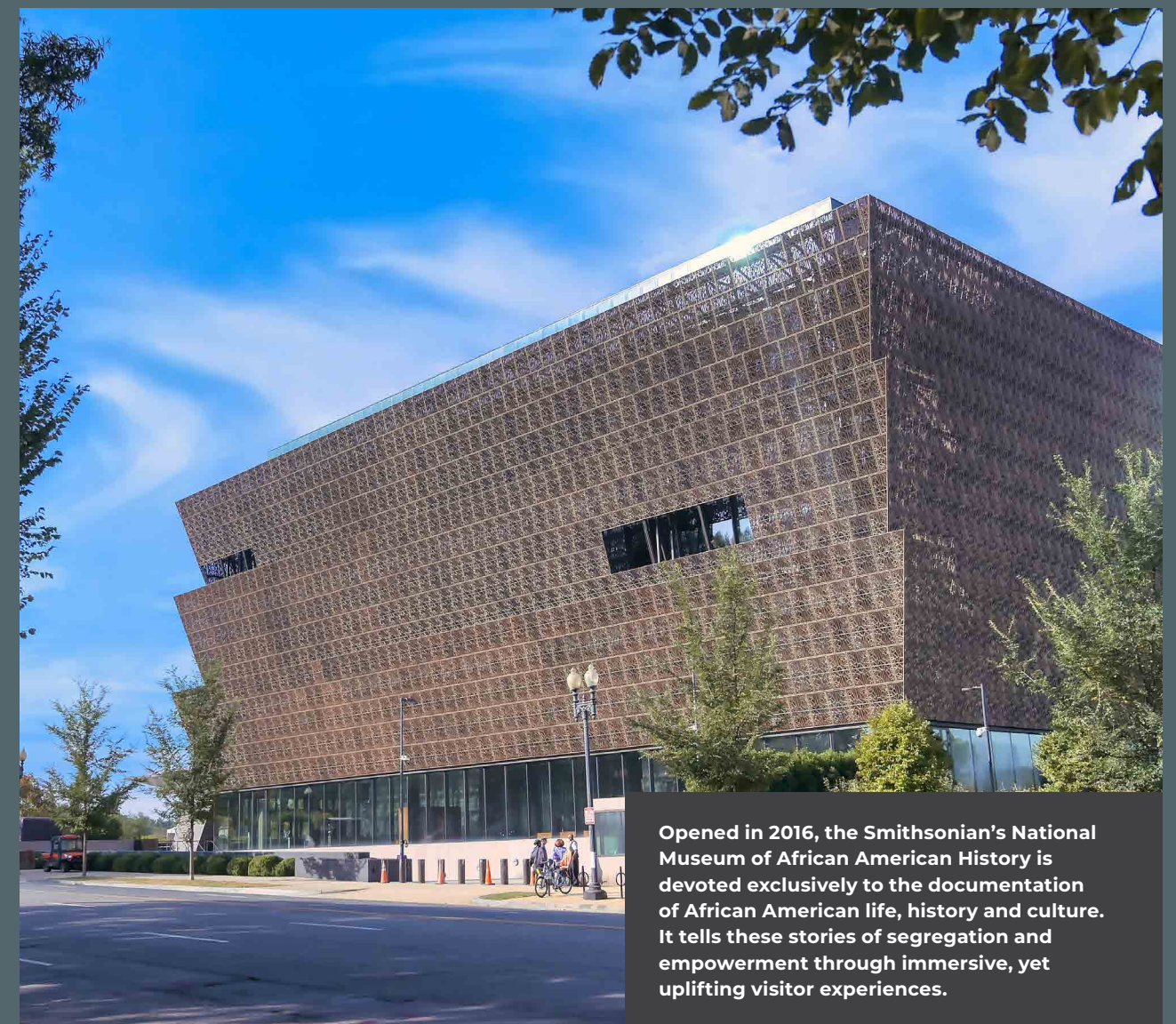
The Brisbane CBD Hotel Investment Strategy rolled out in 2012 to address the undersupply of full-service hotels, proactively engaged the investor community, provided targeted incentives, and waived development fees. It helped to deliver 20 new full-service hotels, adding over 4000 rooms to the Brisbane CBD and offers an example for all cities and regional centres.

8 Hero authentic culture, including via new venues

We can bring Queensland's rich and authentic culture to the fore. This includes accelerating the development of authentic Indigenous products and experiences and incorporating them into and/or co-locating them with world-class food and beverage history and culture.

There are opportunities to collaborate in the telling of Queensland's cultural stories, taking them, for example, beyond the walls of the National Museum of Australia in Canberra or the Australian Stockman's Hall of Fame in Longreach, possibly via the network of visitor information centres.

We need to add depth to the experience in destinations of already high footfall and visitation. We note South Bank could house an iconic First Nations Cultural Centre to share Queensland stories and perspectives – an opportunity acknowledged and backed by the South East Queensland (SEQ) City Deal, a 20 year infrastructure partnership between state, commonwealth and 11 local governments. This location is in the heart of the state capital, in the culture and arts precinct, and could leverage visitation generated by Queens Wharf.



Opened in 2016, the Smithsonian's National Museum of African American History is devoted exclusively to the documentation of African American life, history and culture. It tells these stories of segregation and empowerment through immersive, yet uplifting visitor experiences.

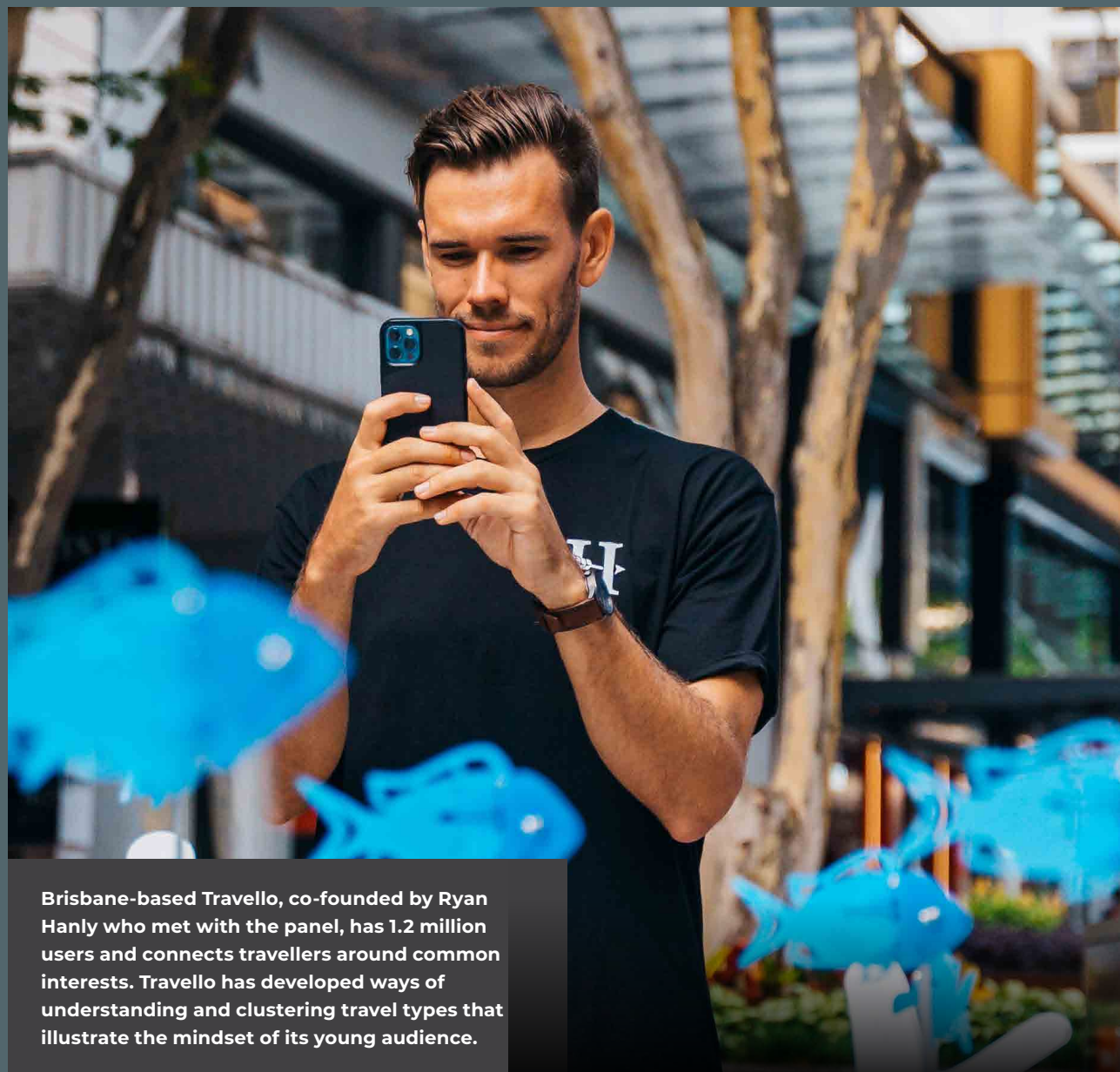
9 Visitor-first mindset

Visitor expectations are changing, and we need to be 'cutting-edge relevant' to keep up. Courtesy of standout so-called 'omnichannel' experiences delivered by leading national and global brands, customers have increasingly high expectations of the way in which services will be provided to them.

We need to be guided by the 'voice of the customer' and recognise that everyone working in Queensland's visitor economy (across industry, within business or government agencies) must have visitor wants and needs foremost in mind. Tourism operators need to

design and deliver seamless customer experiences and, importantly, will need people with new skills to do so.

Industry planning and decisions must be informed by data and up-to-date insights on emerging trends. We need to use software and digital channels to engage and stay connected with potential and actual visitors and capture feedback on visitor experience versus expectations. This will require the right mindset and the hiring of people skilled in technology and its application.



Brisbane-based Travello, co-founded by Ryan Hanly who met with the panel, has 1.2 million users and connects travellers around common interests. Travello has developed ways of understanding and clustering travel types that illustrate the mindset of its young audience.

10 Enabled via sustainable funding

We can't expect the state government to do all the heavy lifting as we grow the visitor economy. We need to seriously consider new mechanisms to garner additional funding. If we give destinations, or local governments, the option to apply a focused tourism enhancement levy, they can raise money to support and grow the visitor economy.

We should also consider the application of 'user pays' fees and charges in circumstances where funds raised can contribute directly to the management of visitor impacts, maintenance and regeneration of natural assets thereby enhancing the overall experience for visitors.



Established in the 1980s, the Municipal and Regional District Tax is collected only in participating regions of British Columbia. It directly funds regional tourism marketing, and enhancement projects.

05

Initiatives to make the change happen

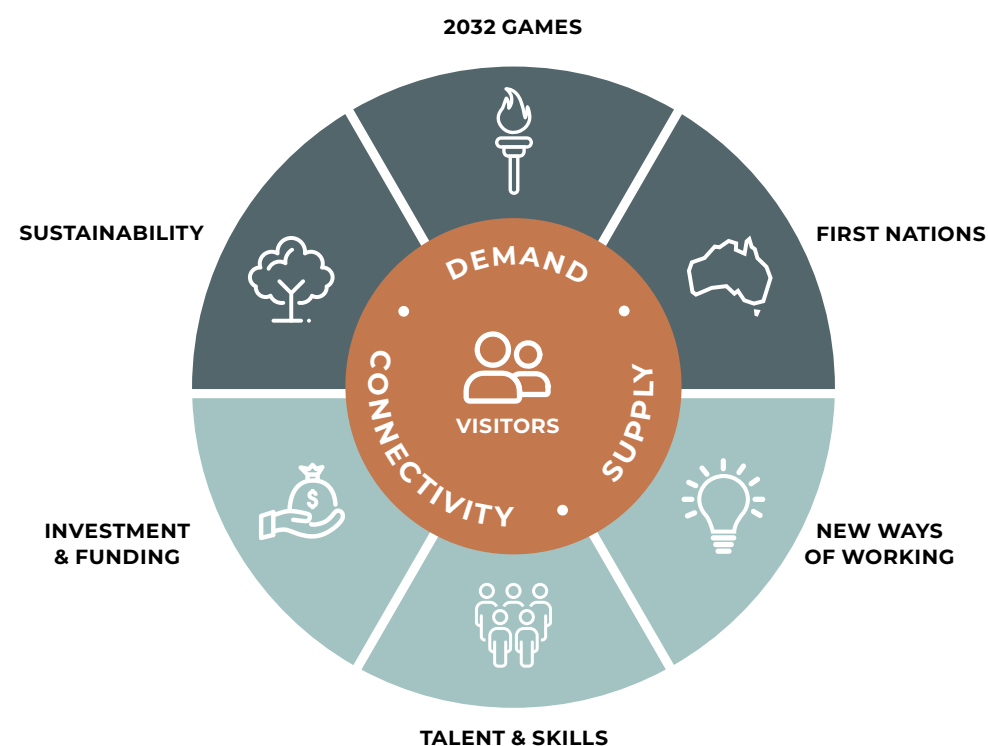
To win in the next decade and beyond, Queensland needs to play more effectively to our strengths and address gaps in our current offering, state-wide.

In our Interim Plan, we created a Strategy Wheel (pictured below) which identified and categorised what needs to occur under three headings:

- Demand, Supply and Connectivity
- Catalysts for Change
- Enablers of Change

We now need to act urgently on the opportunities available to us, harness these catalysts for change and ensure the settings are right to enable our long-term success.

Investing our time, effort and money now – early in our recovery – will deliver exponential growth and returns.



Jarramali Rock Art Tours, Cape York, Tropical North Queensland / © Tourism and Events Queensland

5.1 Demand, supply and connectivity

5.1.1 Experience Development Fund

Recommended Actions:

- 1 Establish a new \$140 million fund to develop significant new and visionary products and experiences, including a contemporary refresh of existing iconic products and experiences, to meet tomorrow's visitor expectation.
- 2 Co-fund projects in line with the opportunities set out in this plan that meet economic, community impact and sustainability criteria.
- 3 Fund to be governed by an independent commercial entity with a skilled and diverse Board, including First Nations representation.

The panel recommends the Government establish an Experience Development Fund, open to all industry participants on a contestable basis.

The goal of the fund is to facilitate new visionary and game-changing experiences that sway our market share of the visitor economy, visitor dispersal and other opportunities outlined in this plan to help Queensland become the destination of choice for visitors seeking the world's best experiences by 2032.

“Our sector requires a refocus toward tourism product and experience development ... there must also be focus and funding to support strategic destination development.”

- Townsville Enterprise

We should assess and measure return on investment against a balanced scorecard of measures proposed by this plan – including economic impact, contribution to the community, resilience and sustainability outcomes.

We recommend the fund be administered by a nimble new entity – a Special Purpose Vehicle or Statutory Authority perhaps called Destination Development Queensland – and be guided by a skilled and diverse board with industry, community and First Nations representation and government oversight.

Destination Development Queensland should make its biggest proportional Experience Development investments in Year 1 (circa \$80 million) and further investments totalling \$20 million in each of at least the next three years, on the basis that weighting

investment early in the recovery cycle is likely to deliver compounding effects later.

It will need to deploy funding flexibly, in line with market needs.

In some instances, this will involve seed-funding innovative new experiences, or piloting new ideas that respond to changing consumer preferences. In other instances, it will involve capability up-lift or new partnerships to enable supply.

It should also have the discretion to back some projects outright and to scale the ratio of government-to-industry investment to maximise available funds and deliver the greatest possible return on investment. Its work will be complementary, rather than duplicative, of that undertaken by Tourism and Events Queensland (including aligning with the Best of Queensland Experiences program and Transformational Experiences work where appropriate) – and focused on enhancing supply.

The proposed quantum of investment reflects the competitive landscape and the number of projects likely to be required and identified across Queensland's various regions.

Victoria is investing \$100 million via a Regional Tourism Investment Fund to create new experiences and attractions.

Western Australia has a recurrent annual investment of \$10 million in a Tourism Experience Development, just topped up by a further \$17.7 million over the next four years. This is in addition to \$152.7 million the government has spent on 29 national park tourism infrastructure projects since 2017–18.

Both NSW and Victoria are also investing to rejuvenate and revitalise the Sydney and Melbourne CBDs, spending \$50 million and \$100 million respectively.

Brisbane's Built Visitor Attraction Study has identified clear gaps and opportunities for the river city.

Queensland is uniquely decentralised – we have four of the top ten largest visitor economies in Australia – and will need to invest not only in Brisbane, but throughout our regional centres to remain competitive and relevant.

Who's responsible?

A new entity, Destination Development Queensland, with support from DTIS, TEQ and independent industry oversight.

5.1.2 Growing Tourism Infrastructure Fund

Recommended Actions:

- 4 An injection of \$50 million into the Growing Tourism Infrastructure Fund to enable critical tourism infrastructure investment, including in accommodation as a priority.
- 5 Deliver amenities, improve accessibility and deliver built assets that improve the 'lived experience' of the visitor.
- 6 Future-proof our infrastructure, particularly with regards to sustainability credentials and climate resilience
- 7 Funding to be available to upgrade and overhaul existing critical tourism-related infrastructure as well as new projects.

The state government has had proven success in working with the private sector to identify and remove impediments to infrastructure development – and co-investing to stimulate it.

In addition to the dedicated investment in experience development, we recommend the government launch a further round of its successful but now fully subscribed Growing Tourism Infrastructure Fund.

Experience Co. told us that the first new pontoon on the Great Barrier Reef in more than a decade would not have been built without the support of this fund.

The panel recommends a further funding round of \$50 million investment by government, to be matched one-for-one by industry.

This will create a \$100 million fund to target projects that meet economic, community impact and sustainability criteria and are highly relevant to the needs of future visitors. This should include enabling investment in accommodation as a priority.

“Queensland's tourism industry needs further support to achieve its goal of regaining its aspirational appeal. To be a world-class destination Queensland needs world-class infrastructure to support it.”

- Visit Sunshine Coast

Who's responsible?

DTIS and other relevant Queensland Government agencies, and local governments, with independent industry oversight.



What it will be like in 2032

We will cater for different types of visitors via both niche and mass products and experiences, the latter providing volume and occupancy in our larger destinations.

5.1.3 Events and marketing investment

Recommended Actions:

- 8 An \$80 million increase in contestable funding for events and destination marketing.
- 9 Grow the year-round events calendar with distinct funding for the development of homegrown events, including to promote dispersal and off-peak visitation.
- 10 Maximise the so-called 'green and gold runway' opportunity for enhancing tourism and trade in conjunction with culture, lifestyle, business and sporting events, in the long lead-time to the 2032 Games.
- 11 Ensure the domestic visitor opportunity is fully captured through new campaign and partnership activities – pivoting to international opportunities when the time is right.

Our competitor destinations are spending big to stimulate demand and inspire visitors to return. Visit Victoria recently announced it is deploying an additional \$55 million in marketing funds. Western Australia is spending an additional \$21.1 million on destination marketing over the next two financial years and a further \$30.7 million over four years to attract more major events.

What it will be like in 2032

Year-round, there will be new and growing vibrant music, arts and culture events, as well as draw-card sporting events, attracting visitors to our cities and regional communities alike.

“ Refocus tourism marketing efforts with a greater emphasis on destination specific marketing, promoting those destinations (such as Cairns and the Great Barrier) that have well established national and international brand recognition ”

- Tourism Tropical North Queensland

The panel acknowledges the investment in Tourism and Events Queensland (TEQ) and the important role it plays in driving demand to visit Queensland. Dynamic marketing campaigns that responded to immediate market conditions have been a hallmark of TEQ's work throughout the pandemic.

We recommend that additional destination marketing funding, over and above TEQ's important existing funding, now be made available on a contestable basis, to RTOs, LTOs and private sector players prepared to cooperatively market with the government.

“ Events are a vital way of putting our region on the map, domestically and internationally. The sale of tailor-made itineraries/tour packages by travel agents would see visitors staying longer, eating out and exploring other parts of the region. ”

- Outback Queensland Tourism Association



Brisbane Truck Show 2021 / © Tourism and Events Queensland

Events

There are strong grounds for the Queensland Government to increase its investment in major event attraction. The impact of COVID-19 on the events portfolio necessitates the rebuilding of the events calendar to ensure it remains attractive to visitors in future years.

In late 2020, the Queensland Government committed an additional \$20 million events boost over four years to secure more events for Queensland, as part of the \$74 million Rebuilding Queensland Tourism commitment.

However, Queensland has by far the smallest events budget of our genuine domestic competitors. NSW and Victoria have also announced significant recovery funding packages for events. NSW's commitment is \$200 million – ten times that of Queensland.

As we emerge from COVID-19, event proponents are working with depleted resources and are looking to go to states that have significant financial support available.

The lesson of Sydney 2000

Many in industry told the panel they regarded NSW as having failed to capitalise on its hosting of the Sydney 2000 Games by not adequately investing to convert the global interest it garnered in the city and state into trade, investment and sustained levels of increased visitation. Queensland must not make this mistake.

Brisbane 2032 provides the generational opportunity to position Queensland as a globally renowned tourism and events destination. This ambition needs to be supported by increased funding commitments over a sufficient forward period (5+ years) to enable the pipeline of event acquisition activity to realise this potential.

Should event funding in Queensland not be increased over a longer period, New South Wales and Victoria will likely be in a better position to take advantage of Brisbane 2032 and secure additional content over Queensland.

We propose an additional \$80 million funding be allocated to events and destination marketing over four years. It should be administered by TEQ to maximise alignment with state-wide marketing campaigns, target specific KPIs and deliver measurable return on investment.

TEQ should split the funding between events and destination marketing in proportions its Board deems appropriate. The allocation of destination marketing funds should be reviewed annually to assess its impact and to recalibrate the appropriate mix of domestic versus international investment.

Who's responsible?

TEQ administered, supported by RTOs, LTOs and industry as appropriate.



Big Red Bash 2019 / © Tourism and Events Queensland

5.1.4 International education and training

Recommended Actions:

- 12 Build a more competitive position for Queensland's various study destinations with international students and their networks of influencers, by better aligning state, commonwealth and local government efforts.
- 13 Leverage Queensland's research, innovation and industry strengths including appealing new fields in which Queensland has a compelling advantage, like sports science in the lead-up to Brisbane 2032, or marine science on the Great Barrier Reef.
- 14 Develop tourism experiences and career pathways that appeal to international students and their influencers and promote available travel options to students.

The panel believes we need to better promote compelling reasons to study, in person, in Queensland by building on the *Study Queensland Start here. Go anywhere* campaign, and further leveraging the network of International Education and Training Business Development Managers located in Trade and Investment Queensland offices around the world.

“Students are seeking a transformative experience that is good for their CVs, boosts their career and is enriched by all that is available outside the classroom. We need to acknowledge that it's not just the domain of universities and education providers.”

- Jonathan Chew, Global Head of Insights and Analytics at Navitas

We support the International Education Association of Australia's call on the Commonwealth Government for a commitment to offer every international student a Work Integrated Learning (WIL) experience.

This will require a community-wide effort at a state level to ensure international students are welcomed into businesses, communities and organisations.

The panel recognises the importance of visas, their availability, conditions and processing for international students when they are considering where to study abroad.

The recent India-Australia free trade agreement extends the 'right to work' post-study to Indian citizens. We recommend the state government advocate with the Commonwealth Government that this be extended to other international students that complete study in Australia.



Brisbane / © Study Queensland

We recommend that various trade, tourism and international education strategies build on the very significant role played by international students and their visiting friends and relatives in Queensland's visitor (and wider, innovation) economy, by:

- better aligning the work of trade, tourism, education and related promotional activities (for example joint marketing and promotion by TEQ, Trade and Investment Queensland (TIQ), Study Queensland and education providers) to amplify international student reach and impact;
- working across government, industry, stakeholders and aligned organisations to support student welfare needs and build a positive and inclusive reputation; and
- work with industry to create pathways for top international talent from further education into tourism industry careers.

Who's responsible?

Study Queensland (TIQ), TEQ and DTIS, working with the international education and tourism sectors

What it will be like in 2032

Students will be attracted by Queensland's safe and inclusive lifestyle with diverse top talent deciding to stay and contribute to our state's future.

5.1.5 Aviation Fund Deployment

Recommended Actions:

- 15 Maximise the \$100 million government investment to rebuild aviation access to Queensland.
- 16 Apply a new, 'whole-of-plane' assessment criteria for deploying the fund.
- 17 Secure new, direct international routes, ensuring that our targeted visitors can access Queensland's destinations. Promote regional dispersal.
- 18 Recapture and then maintain or exceed our pre-pandemic peak market share of domestic and international aviation seat capacity.

We heard extensively in our consultation that the visitor economy won't recover unless we restore and enhance aviation connectivity. Accordingly, in our interim report, we called for an early and substantive commitment by government to funding for this purpose.

We welcome the government's response: a \$100 million fund to attract international aviation capacity and enhance connectivity to the state. The fund is available on the condition of matching investment from Queensland's international airports.

We encourage the development of a new 'whole-of-plane' assessment criteria for deploying the fund, looking at route viability via a combination of factors:

- two-way passenger demand (including business, leisure, visiting friends and relatives, and students); and
- freight fostered by trade links.

We note that TEQ has an aviation framework 2018–25 that continues to guide priorities until a new framework is established to maximise opportunities at the state government level.

It will be important that DTIS, working with the airports, is dynamic in its application of criteria and methodology in administering this fund, while remaining accountable and auditable. There should be a regular review of the fund's success, its return-on-investment and any new priorities that emerge, given the dynamic, competitive nature of the market during recovery.

The panel also notes and supports the appointment of a senior leader with deep aviation expertise accountable for aviation attraction within the DTIS.

Who's responsible?

DTIS and Queensland's airport operators with support from TEQ



Airlines at international terminal / © Brisbane Airport Corporation



International arrivals / © Brisbane Airport Corporation

5.1.6 Improve access throughout Queensland

Recommended Actions:

- 19 Align aviation route priorities with other modes of transport (for example, accelerating the rebuild of the cruise industry) to support the flow of visitors into and throughout Queensland.
- 20 Further develop a Queensland Touring Strategy, including better promotion of established drive routes.

Queensland has some 20 plus active domestic airline routes and, as noted earlier, will have more opportunities in the future to connect point-to-point to additional domestic and international markets.

Beyond aviation, government and industry need to identify opportunities to better connect visitors to our destinations via drive, rail and cruise/marine as essential to visitor dispersal.

There is an opportunity to build on effective inter-agency and industry collaboration evidenced during the COVID-19 health response.

There are other waterway and road and rail touring opportunities that Queensland could better realise, and these should be given increased focus.

The panel notes the submission made to it by the Star that suggested Queensland waterways be explored for greater tourism opportunities. This should include the Brisbane River, Moreton Bay and niche assets such as the Gold Coast canals.

As part of the shift to more sustainable electric vehicles, visitors to Queensland now have the opportunity to travel in electric vehicles from Coolangatta to Port Douglas and Brisbane to Toowoomba. Planned connections include Brisbane to Mount Isa (via the Dinosaur Trail locations), Goondiwindi to Emerald, Longreach to Cairns and Stanthorpe.

We echo Outback Queensland's long-standing call for a new drive tourism strategy for the state, especially given the increased popularity of touring itineraries with domestic visitors.

During the consultation, industry also highlighted the impact of areas of poor mobile network coverage in more remote areas of the state and the handbrake effect this has on industry's adoption of digital technologies and opportunities.

While beyond the scope of the Tourism Infrastructure Fund, the panel notes this is vitally important infrastructure to be addressed.

Who's responsible?

DTIS and other relevant Queensland Government agencies, working with industry as well as local and Australian Government partners

5.1.7 Business Events Strategy

Recommended Actions:

- 21** Create a shared Business Events Strategy to position Queensland to leverage our state's diverse offerings and competitive strengths to build on the doubling of investment.
- 22** Better align Queensland's industry and research strengths and trade and investment activities to improve the value proposition for event organisers.
- 23** Longer term funding commitments to better support the bidding cycle.

Queensland operates five convention bureaus – Gold Coast, Brisbane, Cairns and the Great Barrier Reef, Sunshine Coast and Townsville. It also has three state-owned Convention Centres – Gold Coast, Brisbane and Cairns.

Business events target different audiences for various purposes, for example, national conferences, incentive events or trade shows. Queensland needs to leverage our unique destinations, trade and industry credentials to win events and partner in their success.

The business events sector is estimated to be worth \$35.7 billion to the Australian economy. Yet Queensland hosts about 16% of Australia's business events and 18% of delegates – well below our interstate rivals in NSW and Victoria (with 55% of events and 62% of delegates together).

In response to our interim report, the Queensland Government announced it will invest an additional

\$7 million over two years to bid for conference and business events, taking the total funds available for that purpose to \$14 million over the two years.

The panel now recommends the creation of a Business Events Strategy to ensure a strong return on investment is delivered by this and future funding. The strategy should:

- identify Queensland's comparative advantage and highest-value opportunities, including linking to Queensland Priority Industries and opportunities aligned to hosting of the 2032 Games;
- identify, cultivate, and deliver conferences aligned to core capacities or destination assets – for example, on the Gold Coast this could include Higher Education, Health and Knowledge Precinct/ innovation sector-linked conferences or marine industry and/or Ocean Beaches Management related events; and
- seek to maximise opportunities at a state level, including by better aligning the efforts of TEQ, TIQ and relevant government departments, noting that the convention bureaus also compete with one another.

It can take more than five years to research, bid and deliver a business event. Therefore, we also recommend that funding, which has historically been allocated annually, is committed on a three or four-year basis.

Who's responsible?

TEQ, DTIS, Convention Centres and Bureaus, including relevant RTOs and LTOs

5.2 Catalysts for change

5.2.1 Accelerate ecotourism

Recommended Actions:

Enable responsible ecotourism opportunities in natural areas, including:

- 24** Investment to establish and maintain world-class national park and protected area infrastructure (including, walking/hiking trails, mountain bike trails, trailhead facilities, wayfinding, signage, interpretation, expert guides, and other facilities).
- 25** Through First Nations consultation, seek to open more areas of national parks to overnight public stays (and infrastructure), including reasonably limited access in partnership with private operators as accepted in other states;
- 26** A funding stream specific to incentivising ecotourism projects (with increased gearing for projects which are regenerative) as part of the Destination Development Fund to be managed by Destination Development Queensland.
- 27** Consideration of new category of protected area when adding to protected estate.
- 28** Continued realisation of opportunities in areas adjacent to national parks.
- 29** Review Queensland's legislative and policy framework and approvals process in the context of national and international competitors and progress changes to position Queensland as an ecotourism leader and capture market share.
- 30** Ensure all on-country tourism involves deep First Nations consultation and results in financial and non-financial benefits accruing to Traditional Owners.
- 31** Enhance transparency and build a sense of urgency in approval processes, including with clear KPIs to guide agency consideration and reduce wait times.

Queensland has a clear opportunity to develop sustainable, low-impact tourism experiences which are consistent with the World Heritage convention on park 'presentation' – providing education and contributing to the sustainability of park management.

As noted earlier in this report, future visitors are seeking authentic natural and cultural experiences that not only leave no trace but provide a positive benefit to the local environment and community.

With appropriate access and development, we can capitalise on the growing demand for purposeful travel and further build the reputation of many of our destinations for offering active and healthy lifestyles that support wellbeing.

Conversely, without appropriate investment and adequate planning, it is likely that natural areas will come under increasing pressure as visitors seek access more and more.

Western Australia is rapidly developing its offering in this space. Since 2017–18, its government has allocated \$152.7 million towards 29 national park tourism infrastructure projects, including:

- the Kalbarri Skywalk (\$24 million),
- Karijini National Park (\$16 million),
- Collie mountain bike trails (\$10 million), and
- visitor and management amenities to establish the Houtman Abrolhos Island National Park (\$12 million).

And its most recent budget commits \$17.7 million over four years to deliver a National Park Tourism Experience Development Package including:

- \$6.5 million to establish eight 'shovel-ready' sites in national parks in preparation for private investment, including eco retreat accommodation, and
- \$5 million to work with industry to activate the significant investment in trails and attractions already in national parks to create bookable touring options for locals, interstate and international visitors to enjoy.

For Queensland, we propose that 'regenerative' be adopted as the aspirational future standard to work towards, especially as it relates to tourism operations in protected and sensitive areas.

These experiences can enhance and/or extend the offering to meet and manage increasing visitor demand to explore and enjoy natural and protected areas.

This also complements a brand framework, 'Travel for Good', which Tourism and Events Queensland developed prior to the pandemic that promises a range of rewards from individual emotional wellbeing through to the opportunity to give back – "travel is good for you as a person and travel is good for the world".

What it will be like in 2032

Our calendar will include major events and global business gatherings; visitors will criss-cross the state, including via electric vehicle-enabled touring routes.

Artists impression of Cairns Convention Centre expansion / © Cairns Convention Centre

During our consultations, industry stakeholders stressed that they understand the importance of sustainability and are committed to the need to protect our natural assets.

These objectives can go hand-in-hand with responsible commercial activity that engages and educates future generations and can help fund the maintenance and enhancement of our natural environment.

The panel acknowledges *Queensland’s Ecotourism Plan 2016–2020* and a range of supporting materials have been developed to help industry achieve the vision of our state as an internationally celebrated ecotourism destination.

However, we heard that while our interstate and international competitors are expanding and improving their ecotourism offering – and had the legislative and policy settings needed to do so – it remains extremely challenging to get approvals for ecotourism developments in Queensland.

As a result, we recommend that government review its settings and outcomes and do so:

- 1. in comparison with interstate and international competitor market settings and outcomes; and
- 2. also with reference to overarching frameworks like UNESCO.

“ Each State Party to this Convention recognises the duty of ensuring the identification, protection, conservation, presentation, and transmission to future generations of the cultural and natural heritage.”

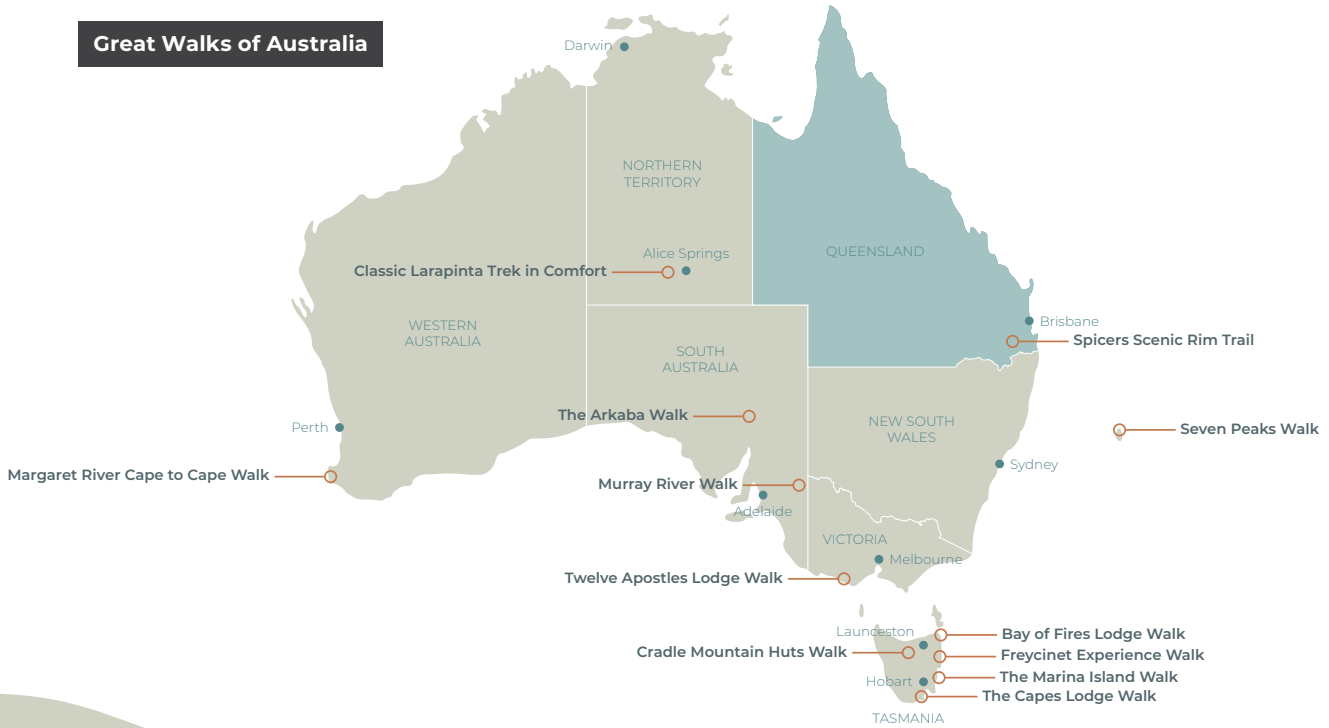
- UNESCO World Heritage Convention 1972

We need to ensure we have appropriate settings for Queensland to position itself as an ecotourism leader and to capture market share.

The panel recognises the Queensland Ecotourism Trails Program and work of both DTIS and the Department of Environment and Science, with local Traditional Owners and the private sector to deliver world class ecotourism trails, such as the Wangetti Trail, for both walking and mountain biking, in Tropical North Queensland. This program provides an important starting point with clear long-term benefits.

Yet, we recommend government consider what more can be done, in consultation with Traditional Owners, to support the development of iconic new multi-day trails and walks that include limited low-impact overnight stays within national parks.

The Great Walks of Australia map below, illustrates the opportunity Queensland has to establish additional Great Walks. Queensland should become a leader in this space.



Milford Track Great Walk labelled as the ‘finest walk in the world’, the Milford Track in New Zealand’s Fiordland National Park has thrilled hikers from around the world for more than 150 years. The five-day walk features a series of huts, providing walkers with bunks, mattresses, heating, toilets, basic cooking facilities, solar-powered lighting, and cold running water. Notably, during the Great Walk season, each hut has a ranger in residence to support walkers and offer a compelling educational experience.

In our interim report we called on government and industry to pilot low-impact opportunities on land adjacent to national parks or within protected areas and are pleased to note that potential sites have now been identified.

Queensland’s national park and protected area estate is set to increase in line with government and international commitments.

In discussions with the panel, Queensland’s Chief Scientist Professor Hugh Possingham noted that the International Union for Conservation of Nature and Natural Resources (IUCN) has developed multiple categories for protected areas. This allows for greater recognition of past use of the natural environment when regulating future use.

The visitor economy, and tourism operators, represent important partners that share conservation and sustainability values.

The panel believes it is timely to consider the potential to introduce a new category of protected area, possibly using the IUCN framework, to encourage the development of new ecotourism experiences.

For example, there could be a category that protects biodiversity but also allows small-scale commercial tourism activity – particularly where recreation or other activities have occurred in the past.

Who’s responsible?

Queensland Government agencies working with Traditional Owners and industry.

5.2.2 Sustainability and Climate Adaptation Plans

Recommended Actions:

- 32 Develop Sustainability and Climate Adaption Plans for Queensland’s visitor economy (and local variations) that encompass:
 - actions on climate change adaptation and transition.
 - actions to reduce carbon emissions to net-zero by 2050.
 - social impact and governance (such as diversity, equality, and wellness).
 - energy, plastics, water and waste management.
 - circular economy operations and biodiversity management.
- 33 Funding for regions to ensure capability to develop and implement plans
- 34 Establish guidelines to deliver the Plan including:
 - metrics and criteria for Environment, Social and Governance (ESG) outcomes.
 - alignment with the United Nations Sustainable Development Goals (SDG) for new product development.
- 35 Communications to explain the industry pathway to visitors, residents and investors.

In our interim plan, we described a vision for Queensland’s future in which: “We are leaders in sustainable tourism which is good for the economy and good for the planet. We develop a clear pathway for the visitor economy to net-zero and establish success measures which encompass community benefits including positive environmental and economic outcomes.”

The panel recognises that some stakeholders may see sustainability measures as an additional cost/compliance burden during a tough economic recovery period.

However, our view is that we need to reframe such thinking: investing now will avoid the need for expensive intervention and regulation later. It also meets a growing customer demand for low-impact travel which is fast becoming an expectation.

The Queensland Regional Tourism Network is currently funded to deliver a RTO Climate Change Action Plan. We recommend each region develops aligned plans.

“Sustainability is not an add-on marketing strategy. It is not experience development. It must sit central to our brand and business values.”

- Stewart Moore, CEO of Earthcheck

Avoiding over-tourism

In our consultations, industry acknowledged the risks of “over-tourism” and understood that sustainability can become a point of difference that is key to the future attraction of visitors, retaining the support of communities and attracting top talent to our industry.

Sustainability relies on a holistic approach across all government policy areas. “This is nowhere more evident than in relation to climate change and, for instance, the Great Barrier Reef, our most valuable tourism asset,” the Queensland Tourism Industry Council wrote in its submission.

We believe plans will be best developed regionally to ensure they are meaningful, practical and tailored to local needs, particularly given different regions and participants are starting from different levels of maturity. They should be aligned with, or contained within, overarching Destination Management Plans.

Funding should be flexible to enable regions to source expert help and to develop and build out their own resources and skills. We will also need to access and share best practice from within industry and beyond.

Once the plans are in place, investment will be required to accelerate and incentivise transition in line with state priorities and opportunities, for example, for the development of hydrogen marine vessels for a Great Barrier Reef fleet.

Finally, we note that various support certification programs, such as those offered by independent entities including Ecotourism Australia, QTIC and Earthcheck, can play an important role in accelerating industry transition.

Who’s responsible?

Industry and operators, Queensland Government agencies

What it will be like in 2032

Communities will support and value the contribution visitors make to their environment and lifestyle.

5.2.3 First Nations leadership

Recommended Actions:

- 36** Support regions to develop and implement a First Nations Tourism Action Plan, led by First Nations people, to map a practical way forward.
- 37** Support the creation of new Indigenous-owned and operated businesses through programs identified and led by First Nations people.
- 38** Extend cultural understanding via, for example, similar programs to those run during the Year of Indigenous Tourism.
- 39** Continue to create access to opportunities for Indigenous peoples in the tourism industry.
- 40** Maintain commitment to Destination IQ, an initiative of QTIC hosted by the QTIC Indigenous Champions Network, which has grown to become a stunning annual showcase of First Nations Tourism activity in Queensland.

In our interim report, we called for the preservation and celebration of First Nations cultures by incorporating the First Nations' voice in visitor experiences. We noted we have the two oldest living First Nations cultures on earth.

The panel acknowledges the leadership of First Nations people in determining and delivering the next step in Queensland's First Nations tourism journey and welcomes formation of Indigenous tourism peak bodies, such as the Queensland First Nations Tourism Council, with their leadership role in defining and leading next steps.

We recognise the objectives of the Queensland Tourism Industry Council's, First Nations Tourism Plan which include surfacing First Nations culture through stories and connection to country, creating mutually beneficial partnerships to grow the First Nations tourism sector and the development of authentic, quality export-ready products.

The plan incorporates the principles of the Larrakia Declaration to support self-determined economic development via Indigenous tourism.

There is untapped potential in our regions, including existing cultural sites and opportunities for connection to country. The opportunities include jobs, community, environmental and economic benefits particularly for the very remote and disadvantaged areas.



Janbal Gallery, Tropical North Queensland / © Tourism and Events Queensland

“In Queensland, there is such a rich diversity of Aboriginal and Torres Strait Islander stories across the state that make up our identity – we must capitalise on the arts within tourism to connect, showcase culture and highlight the importance of storytelling and truth-telling.”

- Cameron Costello, Deputy Chair,
Queensland Tourism Industry Council and
Interim Chair of Queensland's First Nations Tourism Council

The Year of Indigenous Tourism (YOIT) gave rise across the state to various experience development initiatives including mentoring programs, a significant upgrade of marketing assets, enhanced programming of First Nations content in existing festivals, and increased funding to support the engagement of specialised, Indigenous talent to design and deliver experiences.

This also included the creation of the Our Country Advisory Service (OCAS) providing targeted support, advice, toolkits and voice to emerging and established Indigenous tourism operators, sectoral aligned businesses, and community-owned organisations.

We welcome First Nations leaders' guidance on the appropriate incorporation of language, food and stories into visitor experiences, many of which were showcased via presentations made at the DestinationIQ conference in November 2021.

There remains a strong need to support industry development, not by doing the work, but by offering the scaffolding and funding to support First Nations people and business owners to achieve their own success.

We also note that the Path to Treaty is a significant Queensland Government initiative started in 2019 and designed to reframe the relationship with First Nations Peoples – and truth-telling and healing are an important part of the Path to Treaty process.

There is an opportunity to promote truth-telling as part of Indigenous tourism, including stories of Indigenous history and colonisation on the lands/waters on which the tourism experiences are happening.

Who's responsible?

**Queensland's First Nations leaders
with industry and relevant state and
Commonwealth government agencies**

5.2.4 Brisbane 2032 Olympic and Paralympic Games

Recommended Actions:

- 41 Create a plan to maximise the Brisbane 2032 opportunity for Queensland's visitor economy.
- 42 Leverage the 10-year runway to the Games to deepen relationships within key international source markets, especially India, which has a population of 1.3 billion people, 60% of whom are under 35.
- 43 Appoint a representative tourism industry panel to engage with a united voice on material opportunities of development, legacy and impact.
- 44 Use our hosting of the Paralympic Games as a driver for the state to become a leader in accessible tourism.

As those involved in bidding for Brisbane 2032 noted, South-East Queensland is Australia's premier lifestyle region and, as such, it is growing at twice the OECD average rate.

Our hosting of Brisbane 2032 will accelerate urban transformation and position Queensland to compete in the events and tourism space on the global stage for decades to come.

Brisbane needs to build its global proposition with a clearly defined capital city narrative that is embraced, supported and promoted by all stakeholders. Before the pandemic, Brisbane was Queensland's largest visitor market, holding a 32% share of international and domestic visitation in the year ending December 2019.

The panel strongly supports ongoing planning to develop a night-time economy in and around Brisbane's CBD as a pre-requisite for global-city-status and to add to its appeal, in particular, to footloose young professionals who could work from anywhere in the world.

The bid identified a range of themes and priorities relevant to our plan, including:

- accelerating the delivery of urban amenity and mobility solutions;
- promoting lifestyle as an asset;
- promoting an inclusive, diverse and welcoming community;
- reinforcing our destination as a global sports and events hub/s;
- enhancing destination marketing; and
- achieving a climate-positive Games.

What it will be like in 2032

Queensland will offer visitors vibrant, authentic, engaging and sustainable First Nations tourism experiences that share and celebrate our rich and unique culture, traditions and heritage of First Nations peoples.

The panel notes strong alignment of the bid priorities with the needs and objectives of growing the visitor economy and recommends that industry coordinate to maximise its engagement with the relevant decision-making authorities.

This will involve infrastructure development, the development of international relationships, securing major and business events, short and long-term education, etc. It's a complex set of outcomes to navigate as an industry.

“The Olympic Games will be a great two weeks, but it's the runway, the ten years to drive legacy infrastructure, to position our destinations from a marketing and brand point of view, that is really exciting.”

- Patricia O'Callaghan, CEO at Destination Gold Coast

Additionally, the panel sees an opportunity for Queensland to attract sporting codes' peak bodies on a permanent basis, along with:

- visitation for training camps and acclimatisation programs; and
- the extension to hosting of major and mass participation sporting events, conferences and related business events.

As expressed in our interim plan, the specific accessibility needs of seniors and people with disability are of growing importance to visitation and present an opportunity for the state.

We welcome the announcement by the Queensland Government in November 2021 of a \$450,000 investment in an independent appraisal to review tourism infrastructure accessibility and tourism business capability in six regions of Queensland for people with disability.

The Board of the Organising Committee for the Brisbane 2032 Olympic and Paralympic Games is now complete and we also welcome the appointment of Dr Sarah Kelly, the current deputy chair of TEQ, who will help ensure that tourism needs and legacy have a clear voice within the organisation.

Who's responsible?

Relevant Queensland Government agencies and local governments, with input and active participation by industry.



Noosa Summer Swim – World Series Swims 2022 / © Tourism and Events Queensland

5.3 Enablers

5.3.1 Attract and facilitate investment

Recommended Actions:

- 45** Review investment processes, including cross-government approvals, with the objective of increasing transparency, reducing complexity and speeding up approval gateways.
- 46** Embed an 'industry-as-a-customer' approach to government service delivery, including actively pursuing and supporting investors and proponents.
- 47** Annual investment conference to showcase opportunities, including to superannuation fund managers and other private sector participants.
- 48** Maintain a prospectus for investment in Queensland's destinations, and proactively promote visitor economy investment opportunities.
- 49** Continue to urgently advocate for a national approach to insurance to ensure that critical tourism businesses have access to affordable commercial property and public liability insurance.

The panel notes that there are usually significant costs and resourcing borne by operators to go through a development approval process. This is particularly onerous for small business operators. We heard consistently from operators big and small that:

- it can be difficult to secure development approvals, including permits and licences especially for nature-based products and experiences;
- regulatory and government administration processes are often barriers to investment; and
- that existing approvals processes lack transparency on progress and decisions on outcomes generally take longer than is thought reasonable.

"Many operators struggle to negotiate regulatory processes and associated red tape, legislation, regulation, and planning acts," the Queensland Tourism Industry Council submitted.

The NRMA said approvals could be handled far more efficiently "in a dialogue, in partnership with the applicant" rather than via a "black box" decision-making process.

We raised some of these issues in our interim report and welcome, in response, the Queensland Government's appointment of a Deputy Director-General for Tourism Recovery to champion tourism projects across government.

As per our interim plan, we reaffirm our call for:

- simpler, faster investment approvals from all levels of government;
- that the Queensland government adopt an 'industry-as-a-customer' approach, agreeing service standards (such as service level agreements) ,including setting timeframes for each key step in any approvals process;
- service standards to be published and performance reported against periodically.

More proactively, the state government should host an annual investment conference where it releases an updated prospectus of potential investment opportunities across the state.

The showcased opportunities should be identified in collaboration with regional development boards and local government and identify any site pre-approvals, licences and enabling infrastructure works that would expedite projects.

The panel also heard much concern regarding property insurance costs and that the availability of public liability for adventure activities has either risen exponentially or has become unavailable entirely, placing real constraints on the development and operation of adventure experiences.

The market failure is complicated by global factors, state and federal regulation, natural disasters, and increased litigation.

The Panel notes that the Australian Government's visitor economy strategy, THRIVE 2030, includes an action to encourage the provision of accessible and affordable insurance for visitor economy businesses.

We also note the National Injury Insurance Scheme (NIIS) model implemented in New Zealand and believe such a system (or something similar) could provide affordable and accessible liability insurance for small and medium businesses.

Who's responsible?

Queensland Government agencies working closely with investors and industry.

What it will be like in 2032

Business people will swim, hike or reflect, alfresco, between online meetings from our state's amazing destinations in the work-from-anywhere world.



5.3.2 Enable priority developments

Recommended Actions:

- 50** Government creates a pathway to prioritise approvals for tourism infrastructure projects, potentially drawing on disaster recovery legislation, priority economic development legislation, including the Economic Development Act and/or the Planning Act.
- 51** Government consider simplifying lease conditions or offering freehold title to attract renewed investment and enhance the viability of island resorts.
- 52** A priority pathway should be available for at least the first three years of recovery as a trial with the aim of reducing hurdles, increasing speed and creating transparent conditions of approval for developments.

Coming out of the pandemic, and in the face of intense interstate and international competition, there is an urgent need to kick-start and renew our product and experiences.

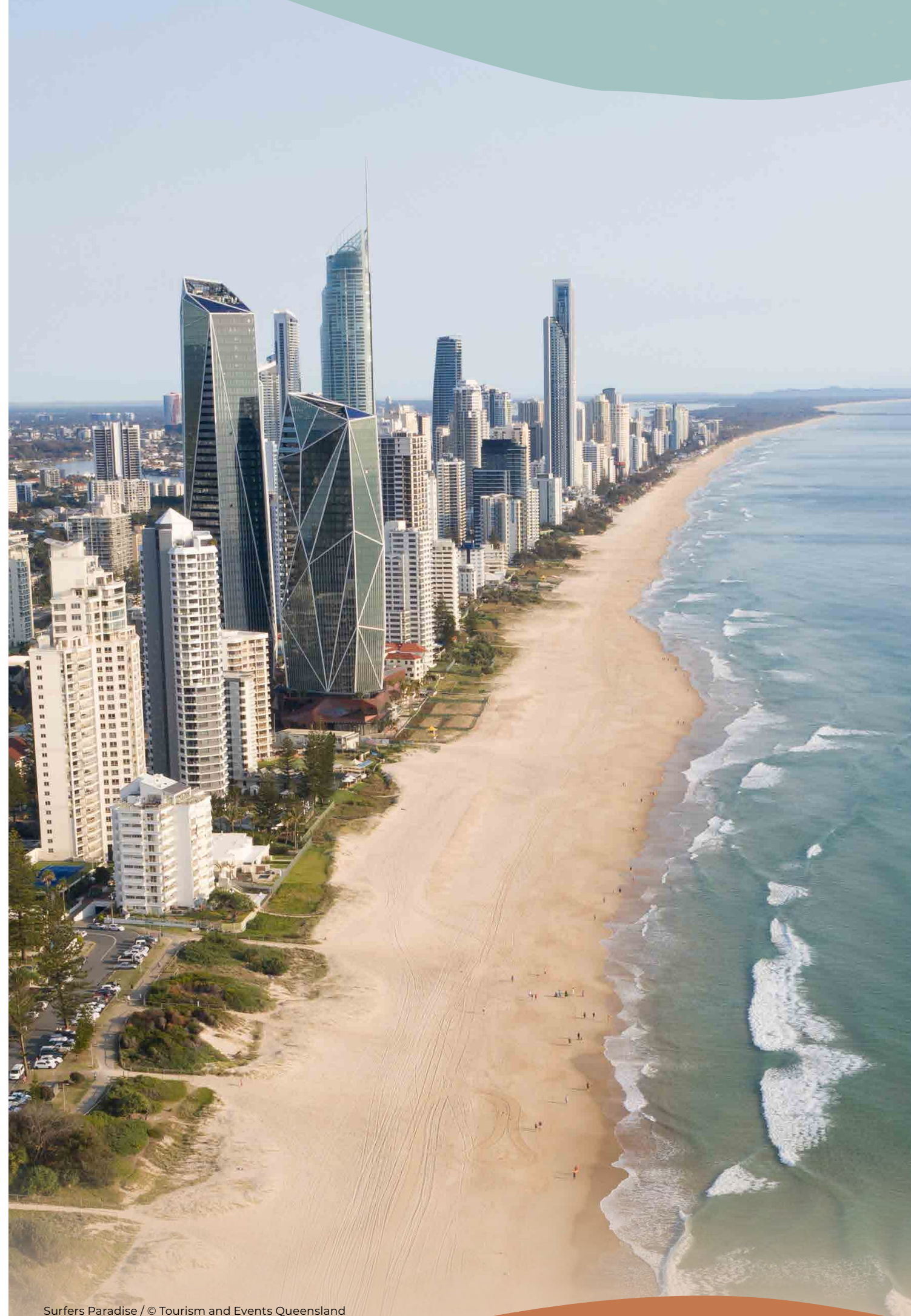
We heard from industry that it is complex and extremely time-consuming to get government approvals for new projects, particularly those that are nature-based.

The complexity of tourism development varies, from large-scale built attractions like hotels and theme parks to small experiences like surf schools or tours. And, equally, the capability of our industry to navigate the red-tape and secure licences and approvals is also varied.

“There is often a ‘disconnect’ between state and local planning approaches. The state government has the power to fast-track priority projects, but this seems to be reserved for large scale projects of other sectors.”

- Brett Fraser, CEO, Queensland Tourism Industry Council

Queensland’s islands are globally recognised and offer a compelling reason to visit. However, island resorts face higher running costs and bare additional regulatory obligations than mainland resorts. Lease and tenure conditions impact the viability of island resorts and their appeal to investors.



Surfers Paradise / © Tourism and Events Queensland

“I think a really important strategic priority is that Queensland is easier to do business with... as someone who moved here a few years ago, the layers and organisations can be very confusing.”

- John Warn, Chief Operating Officer
(Apartments and Realty), Accor

The panel notes with interest the Queensland Parliamentary inquiry into the economic and regulatory frameworks for Queensland island resorts due to report in August 2022, and welcomes detailed consideration of these issues and solutions to enhance their success.

After Tropical Cyclone Debbie in 2017, the Queensland Government worked with affected councils to ensure recovery works were fast-tracked under a planning and development assessment framework. This included allowing temporary changes to local planning schemes to enable faster development.

COVID-19 has been a disaster for the tourism industry and disaster recovery initiatives normally reserved for natural disasters now need to be considered.

The panel acknowledges that Queensland’s planning system has evolved to cater for significant projects and provide pathways for priority developments. Projects like the Capricorn Integrated Resort are currently working through the Coordinator-General’s assessment and approval process. Yet, most tourism projects are too small to meet the criteria for a coordinated project.

In our discussions about Queensland’s planning system, we heard of the Ministerial Infrastructure Designations currently used to stream-line approvals for community infrastructure such as schools, hospitals and fire stations.

While this approval avenue may have limitations, we recommend that the government consider how this, or other options, might be made available to tourism infrastructure projects – if only for a limited time or on a trial basis, during the early stages of recovery.

Who’s responsible?

Local government and relevant Queensland Government agencies

5.3.3 Grow talent and skills

Recommended Actions:

- 53** Extend funding to enable proven Business Capability Programs to continue and scale.
- 54** Form a working group of government, universities and private sector organisations skilled at identifying emerging talent to design and facilitate short and long term-solutions, including:
 - Accelerate skills pathways (professionalising careers in the visitor economy), including funding unaccredited training and micro-credentials to enable rapid, 'on-the-job' pathways to roles in industry;
 - Future skills mapping to inform future education and training requirements for the industry and to highlight the role tourism can play as part of the solution in the state's skills transition, particularly in remote and regional areas; and
 - Establish new programs specifically designed to ensure world-best practice in the delivery of customer service.
- 55** Maintain and create new mentoring opportunities to accelerate know-how and talent readiness.
- 56** Establish a Queensland Tourism Knowledge Hub in conjunction with our universities to coordinate visitor economy research and development activities.
- 57** Incentivise supply of worker accommodation in visitor hotspots – e.g. Noosa/Airlie Beach, potentially accompanied by packaged-up 'job plus accommodation' for workers.
- 58** Advocate to the Australian Government the relaxation of visa and employment restrictions around extended-stay international travellers, including right-to-work after studying, to fortify the supply of talent.

Based on Tourism Research Australia's most recent analysis, Queensland has lost an estimated 40,000 tourism jobs, and associated talent pool, since the onset of the pandemic.

We need to create pathways to make a career in tourism, hospitality and events a livelihood of choice for young people and mid-career reformers alike.

This will require better connections between universities and other education providers with industry, including for training program and course design, industry-based placements, training for direct entry roles and networking events for students and potential employers.

We note and support:

- the call by the Queensland Tourism Industry Council (QTIC) for a range of initiatives including the activation of mature-aged workers and 'grey nomads', and recommend including workers with disability;
- Queensland Farmers' Federation's call for the development of a skilled workforce to deliver high-quality agritourism.

The state government should work with the Australian Government to deliver more seamless and internationally competitive visa entry conditions, fee structures, visa processing and entry experiences for international visitors and key workers.

The Panel acknowledges the success of the Work in Paradise program, listing over 8,000 jobs, attracting almost 18,000 expressions of interest, and paying incentives to over 3,500 people. This program has helped to fill positions and it should be extended.

Micro-credentialing, combined with flexible learning, could play an important role in accelerating fresh talent into the industry, particularly during the early stages of recovery.

We recommend partnering with expert training providers to design and deliver these opportunities be made a priority.

Modelling predicts the visitor economy will need 120% more people with cognitive, social and technological skills over the next 10 years and forecasts Australia will have a shortage of about 750,000 people with such skills.

We recommend future skills mapping to identify the medium-term skills requirements of the industry, and to understand the role that tourism can play in helping regional Queensland to diversify its jobs base as it transitions from existing mining and resources activities. We heard this is already occurring in Outback Queensland.

It is imperative that tourism skills feature as part of the Queensland Government's skills transition program for the regions.

QTIC has demonstrated how impactful the mentoring of new industry participants is in setting them up for success and transfer of know-how – and the panel encourages ongoing investment in such schemes.

The panel wants to underscore the role for industry here, as employment conditions are essential aspects of the employee value proposition.

The 'work your way' program, designed by Accor Hotels, to enhance employee experience is an example of what more industry can do.

Industry also needs to embrace opportunities to future proof itself through the introduction of technology (and associated higher value skills), while automating lower-order work.

This should be combined with qualifications that structure professional career pathways designed to support the development of an inclusive and diverse workforce. If we get this right, in concert with the lifestyle benefits of the sector, our industry will attract and retain amazing talent.

“You look overseas when you travel, hospitality and tourism are seen as long-term career paths, whereas here, it's sometimes mistaken as only entry level roles. Industry as a whole has to take some ownership around that and try and look at ways we can foster and retain talent for the long term.”

- Patricia O'Callaghan, CEO, Destination Gold Coast

Finally, a joint submission from the University of Queensland, Griffith University and the University of the Sunshine Coast, identified that these institutions collectively house 58 tourism academic researchers and 57 PhD researchers.

We recommend the government support the universities' proposal to establish a Queensland Tourism Knowledge Hub to coordinate research and development activities for tourism.

Who's responsible?

Relevant Queensland Government agencies, QTIC and other industry bodies, universities and skills providers and industry.

What it will be like in 2032

A diverse, passionate and skilled workforce, inspired by the opportunity to welcome the world, have chosen tourism as a fulfilling career.



5.3.4 Deploy innovation, technology and data

Recommended Actions:

- 59 Incentivise technology adoption and data use with seed funding and grants.
- 60 Encourage tourism businesses to apply for innovation grants and secure funding via the Advance Queensland initiative.
- 61 Pilot automation and other disruptive technologies, to unlock industry productivity and enhance the visitor experience.
- 62 Establish a design group (government, industry and universities working together, including via innovative partnerships), to explore:
 - the application of open-source data for predictive demand, distribution and planning;
 - the use of data to understand and personalise engagement with future visitors – putting the visitor at the centre.
- 63 Consider specific tourism applications and needs when fostering digital skills and capabilities in the Queensland workforce at large.
- 64 Support tourism businesses to use and deploy technology, and transition to digital through capability programs.

It is now a basic expectation that visitors can access the internet at almost all times (sometimes, problematic in remote regions).

Millennials, who are 'digital natives', are now moving into their earning prime. Their mindset, behaviour, purchasing patterns and service expectations are very different from older visitors.

They trust online reviews more than advertising and expect to be able to self-serve through mobile phone applications and are used to their favourite companies using technology and data to 'know them' and engage them in a highly relevant way.

Technology will continue to disrupt and change travel distribution – and industry needs to upskill and be conversant to harness the benefits.

Ryan Hanly, CEO and co-founder of Brisbane tech-travel start-up Travello, told the panel: "We need to get smart about using technology with commercial intent: How do we engage visitors while they are in a destination to experience, do and spend more.

Queensland's Chief Entrepreneur, Wayne Gerard described the potential for innovation to accelerate the state's economy and support the tourism industry's long-term growth.

Wayne is working to create awareness and connections for the corporate sector into the Queensland innovation ecosystem. And this applies to tourism businesses and local innovators.

The panel understands the Queensland Government's Advance Queensland program helps businesses innovate by supporting commercialisation projects. We recommend that tourism businesses be further targeted by these programs and supported to use and deploy cutting-edge research and technology.

Telstra told us that its technology can capture visitor data for 'before, during, and after' visitation to inform infrastructure planning, help identify emerging trends, support destination marketing, assist in event management and in product offering planning. TEQ already works with data analytics firm DSpark to access and share insights from mobility data.

To succeed, our industry will need to understand what's possible and build new partnerships with innovative companies, including with some outside of tourism.

As a panel, we were provided clear examples of data in action, and local solutions being used by tourism organisations to measure, understand and predict visitor behaviour. We heard from destination managers that it is imperative to:

- enable the accurate and fast collection of data, including real-time data, and data-driven decision-making; and
- look continuously at research to know who is coming, why, and to ensure we provide for them, so they leave as advocates.

The Southern Cross University is exploring real and virtual immersive experiences in wildlife and nature-based tourism experiences, potentially key motivators for visitation to Queensland.

In summary, the panel believes data can offer Queensland a strategic competitive advantage and recommend investment in regular ongoing, almost always-on insights into customer knowledge.

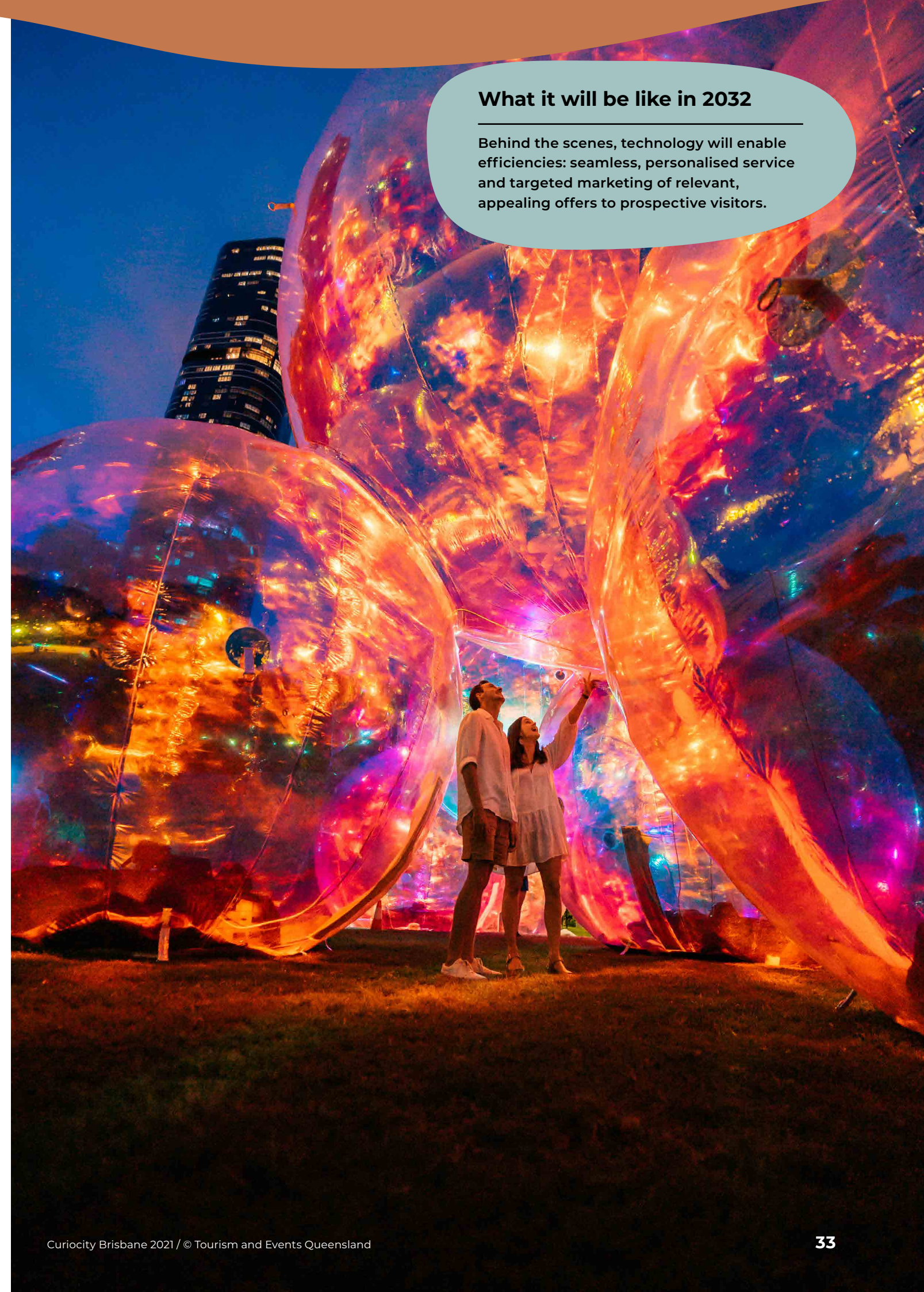
We also note the Australian Government's THRIVE 2030 strategy for Australia's visitor economy identifies the opportunity for technology to enhance accessibility as an important thought for this plan.

Who's responsible?

TEQ, DTIS, universities and industry.

What it will be like in 2032

Behind the scenes, technology will enable efficiencies: seamless, personalised service and targeted marketing of relevant, appealing offers to prospective visitors.



5.3.5 Funding the future

Recommended Actions:

65 Legislative change to provide local governments with the ability to implement a visitor levy guided by the following principles:

- Visitor pays;
- 'Line-of-sight' expenditure – revenue raised is hypothecated for tourism purposes; and
- Locally (by destination) determined charging basis and amount/rate.

66 Levy, where appropriate, fees and charges to recoup running costs and re-invest in our national parks and protected areas (e.g. similar to existing park use fees and marine park visitor fees)

In our consultations we heard that the visitor economy will need a mix of complementary and sustainable funding sources, including user-pays revenue, to extend the core investment by government.

The idea of a visitor levy is not new. It has been modelled, canvassed and debated for the best part of a decade.

While we appreciate that views are polarised as to whether it is an appropriate way to raise funding, everyone we spoke with saw a greater need than ever for increased funding during the COVID-19 recovery period.

The panel believes new funding sources are required but that one model for the whole state is unlikely to work. Any mechanism needs to be flexible – able to be varied at the local council/destination level to suit local circumstances.

With the help of DTIS, the panel has reviewed various funding models in use around Australia and the world. These options, and their application within Queensland, include:

- a Visitor levy – paid directly by visitors, most commonly through accommodation providers.
- an Industry levy (or differential rates) – paid by businesses participating in the visitor economy. Usually collected at the regional or local government level; and
- fees and charges (or visitor management fees) – a wide range of user-pays fees and charges applied at the point of sale to capture the value of an activity.



Roko Island / © Tourism and Events Queensland

“A Tourism Levy is not a mythical beast ... the Gold Coast, the Sunshine Coast, the Surf Coast in Victoria and Broome all have a levy to subsidise their tourism efforts. It doesn't only enhance their efforts in a financial way, it liberates their thinking, their innovation by utilising their community's money for the benefit of all.”

- Robbie Bastion, a Cairns-based industry veteran

We note the proposal by Cairns Regional Council advocating changes to the Local Government Act to allow individual councils to introduce a visitor levy (different to the current option to apply an industry levy on ratepayers), where this makes sense to do so.

A similar model has worked in British Columbia in Canada for more than 30 years and provides tourism destinations, like Whistler, the sustainable funding needed to promote, improve and enhance the otherwise small hill-top village.

The panel recommends further consideration by government of this proposal as a potential means of securing additional sustainable funding sought by industry, provided that:

- any levy is entirely voluntary for local councils to adopt and exclusive to their local government area;
- the basis of any levy or charges to be determined by local government to suit dynamics of the local market;
- funds raised are dedicated to supporting the promotion and/or development of the visitor economy within the specified Council area; and
- any levy must be transparent and 100% reinvested into tourism development and marketing.

Who's responsible?

Relevant Queensland Government agencies, working with local governments and industry.

5.3.6 New ways of working

Recommended Actions:

- 67 Expand representation of 'tourism' in planning and decision-making forums to include a wider range of aligned industries working in the visitor economy.
- 68 Pursue strategic delivery partnerships, common user infrastructure platforms and accelerate engagement with newer partners (including those that cross traditional industry boundaries).
- 69 Develop new mechanisms for sharing knowledge and information and working collectively to realise opportunities, in particular:
 - mentoring (industry peers and outside sector leaders);
 - knowledge-sharing events; and
 - think tanks and advisory panels, including a Youth Council and International Markets Panel of representatives from target international source markets.

The panel notes that there is significant opportunity for knowledge transfer between tourism operators and from other sectors which the government is ideally placed to facilitate.

We need to map out the adjacencies and opportunities such as those already identified with agritourism and marine science.

There are several big themes in this plan which would benefit from increased collaboration: mentoring, knowledge transfer, planning, coordination and strategic partnering.

We believe there is an opportunity to use the state government's scale to bring partnership benefits to what is a largely fragmented industry of smaller operators.

We see an opportunity for the government to access certain strategic delivery relationships (partnerships) to facilitate access to content, insights, data and know-how at a sector level that smaller operators could not otherwise access.

There may be other opportunities for the government to facilitate or develop infrastructure platforms for SME operators to leverage.

The panel sees significant opportunities in strategic partnerships with other sectors such as agriculture and the streaming, television and film industries. The Queensland Farmers' Federation (QFF), for example, has set a vision for Queensland to be the number one agritourism destination in Australia.

Who's responsible?

Industry, QTIC and relevant state and commonwealth government agencies

5.3.7 Coordinating delivery across the tourism network

Recommended Actions:

- 70 Confirm the roles and responsibilities of organisations within the visitor economy ecosystem and align operations to best meet the needs to industry and visitors.
- 71 Ensure sustainable funding for regional and local tourism organisations; and
- 72 Build stronger relationships between the STO, RTOs and LTOs with the aim of having regional resources working as closely together as possible.

The panel's terms of reference asked us to consider the best structure for coordinating delivery across Queensland's tourism network.

The annual RTO Network Aspire report suggests network spent \$62 million in FY21, \$50 million of which was marketing and development costs. Forty percent of the RTO income came from local government and 37% from state government.

Our consultation with industry did not suggest the current structure is fundamentally wrong or in need of significant change.

We note Brisbane Economic Development Agencies' submission that as a standalone RTO, Brisbane would be more effective in driving strong outcomes that would both benefit the capital and the whole of Queensland.

There do, however, appear to be duplications, some misalignments and gaps which we believe can be addressed by clearer definition of roles and

Roles and responsibilities

The role of the state tourism organisation (Tourism and Events Queensland) includes:

- international and domestic marketing, experience development strategy, event acquisition;
- being a provider of expert support and services to local destinations.

Regional Tourism Organisations (RTOs) and Local Tourism Organisations (LTOs) are best placed for:

- local area marketing (to visitors in region);
- product bundling and itineraries, experience development;
- visitor advocacy;
- partnership activity with other RTO/LTO; and
- support alongside local government for events.

responsibilities in line with the 'services to industry' to be provided.

The value of front-line engagement – 'having a local front door' – for local operators to access the government support for the visitor economy has proven its effectiveness during COVID-19.

A review of roles to optimise the network to deliver the outcomes of this plan should be undertaken, informed by the Queensland Regional Tourism Network, TEQ and other relevant government and private sector stakeholders.



Splitters Farm, Bundaberg / © Tourism and Events Queensland



Kanu Kapers Australia, Sunshine Coast / © Tourism and Events Queensland

We recommend as a next step that each participant reviews their activities and interfaces in line with the roles and responsibilities described above.

Tourism and Events Queensland (TEQ) and the state government currently recognise 13 RTOs, although the funding model and boundaries are currently under review.

We have noted both the complexity and potential inequity of current structures and believe some of the user-paid funding models and new contestable funds open to all LTOs and RTOs may help.

We see the LTO and RTO roles are to know and understand the local experiences on offer – identifying incredible local experiences, supporting on-the-ground destination development and capacity building and helping with distribution partnerships and promotion via TEQ.

At a state level, TEQ's role is similar, but writ large: it tells a bigger picture story, particularly to interstate audiences where Sydney and Melbourne are the primary source markets. TEQ also leads the strategic development of experiences in Queensland.

TEQ has an economy of scale, systems, buying power and aggregated expertise which can enable the effectiveness of regional and local tourism organisations and other stakeholders in promotion and newer ways of working, including personalisation and visitor-first thinking.

It is also best placed to conduct state-wide analysis of opportunities and trends, identify best practice and facilitate sharing of know-how between regions.

Tourism Australia works around the globe and should be focused on inbound tourism with the support of TEQ as it relates to the products and experiences on offer in Queensland.

Those at the 'front line' (RTOs and LTOs) should offer a local concierge service, assisting industry to package products and experience and access services.

We also recommend any additional funding for the tourism network should be administered via TEQ, be contestable and encourage matching funding and be focused on:

- targeting visitors to experience more while in region;
- partnership activities within and across regions/ experience clusters;
- experience development;
- visitor advocacy program – which could be measured through a net promoter score;
- support TEQ event acquisition; and
- leverage TEQ domestic and international marketing activity.

Who's responsible:

RTOs, LTOs, TEQ, QTIC and the Queensland Government and local governments

- Examples include but are not limited to:
- Queensland Tourism Industry Council – QTIC
 - Queensland Hotels Association – QHA
 - Accommodation Association of Australia – AAOA
 - Queensland First Nations Tourism Council - QFNTC
 - Tourism and Transport Forum Australia – TTF



- Examples include but are not limited to:
- Tourism & Events Queensland – TEQ
 - Department of Tourism, Innovation and Sport – DTIS
 - Other Queensland Government agencies
 - Local governments
 - Australian Government

- Examples include but are not limited to:
- Experience operators
 - Accommodation providers
 - Airlines
 - Airports
 - Transport

What it will be like in 2032

We'll be informed by data, assisted by technology and delivered by a capable, skilled and inspired workforce ... the best collaborators and most connected through our diverse industry and state.



TreeTop Challenge, Tamborine Mountain / © Tourism and Events Queensland

06

Staying on course

Recommended Actions:

- 73** Adopt a balanced scorecard of goals and measures to guide collective action and behaviour
- 74** Review and present progress against this plan annually, at DestinationQ Forum.
- 75** Establish a 'Towards 2032' Cabinet Committee with relevant Queensland Government Ministers to fast-track implementation of the plan.

In November every year participants in Queensland's visitor economy gather for an annual conference incorporating DestinationQ (Queensland) and the Destination IQ (Indigenous Queensland) and the Queensland Tourism Awards gala ceremony.

In 2021, almost 1,000 people attended. The tremendous momentum around the development of Indigenous products and experiences was showcased, government priorities were explained and insights were shared by industry leaders.

In spite of the trauma of the previous two years, participants were excited and looking optimistically to the future.

The panel recommends that each year we use the forum to review progress toward our vision. That speakers and case studies feature new products and experiences, customer insights and trends and relevant innovations from other sectors and industries in line with the opportunities set out in this plan.

Our opportunity won't be realised without substantial leadership and investment by the Queensland Government. But nor will it be grasped if it's left to the Government to act alone. We will need to act collectively to drive compelling progress right across the state.

Given the collective outcomes targeted by this plan, it is appropriate that oversight is shared by industry, state and local government and via engagement with local communities.

We recommend implementation of the Queensland Government's actions under this plan be overseen by a 'Towards 2032' Cabinet Committee which brings all relevant ministers together to fast-track Queensland's tourism recovery and ensure our long-term success.

“Tourism is relevant to various government portfolios – and cuts across all levels of government – greater commitment and coordination is needed”

- Brett Fraser, CEO, Queensland Tourism Industry Council

The good news is that the outcomes we are targeting will be primarily driven by Queensland's competitive performance. The future is in our hands.



Whitsunday islands / © Tourism and Events Queensland

6.1 Special thanks

The Panel would like to thank and acknowledge all those organisations and individuals who contributed their time and knowledge to shape this Plan:

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Beach Bikes on the Gold Coast / © Tourism and Events Queensland