



Designing our tourism future

Starting the conversation

May 2021



It's time to think outside of the box.

To say the last year has been difficult would be an understatement – 11.3 million less visitors travelled to and within Queensland in 2020, representing a loss of \$12.3 billion in overnight visitor expenditure.

Queensland is well positioned to be a winner in tourism post COVID-19. To capture the opportunity in full, we will need to adapt to meet the changing visitor attitudes and outlooks to travel. The decade ahead has the potential to be a transformational time for Queensland tourism.

The Tourism Industry Reference Panel will work hand in hand with industry to understand and re-shape the future of the visitor economy in Queensland and identify the actions needed to achieve this.

This paper poses questions about the future you envisage and encourages answers as to how to get there. It starts a wide-ranging conversation about the future of tourism in our state.

Queensland is well positioned, it is a state that has managed the health crisis well, is filled with wide open spaces, is clean, green and abundant with local produce.

We, meaning both the Panel and industry are a proud bunch, with every right to be. So, it's up to all of us to show Queensland off – to position our state to win in an increasingly competitive landscape.

As the Tourism Industry Reference Panel, we must be facilitators for change and improvement. While the Panel has the backing of the Queensland Government, we are not the policy makers. Rather, it's up to us to provide frank and fearless advice to the Government.

We've taken the time to carefully consider the task at hand in building an Action Plan for Tourism Recovery, but we can't do this alone.

Whether you are a sole trader, part of a chain, or a large organisation, we want to hear from you. Your day-to-day experience will help us to bust the myths, look ahead and to spark excitement within our industry.

Put simply we seek your help – we need your ideas on how Queensland tourism can re-imagine itself post COVID-19 and re-position our state, once again, as a market leader and global destination of choice.

Liz Savage
Chair

A handwritten signature in black ink that reads "Liz Savage".

TOURISM INDUSTRY CONTEXT

The COVID-19 global health pandemic has had a profound impact on the world. The global tourism industry, whose lifeblood flows from the movement of people, has been hard hit.

The United Nations World Tourism Organisation has reported that export revenue from tourism could have fallen by as much as \$1.2 trillion in 2020¹. In Queensland, the impact has shattered the state's record increases in visitor numbers and reduced overnight visitor expenditure to levels lower than before 2010.

Pre COVID-19 (2019)

From a record breaking

\$25.5 billion
in overnight visitor expenditure



During COVID-19 (2020)

To a decade low

\$13.2 billion
in overnight visitor expenditure

COVID-19 has created a 'multi-speed' tourism economy:

Domestic business travel

-44.6%



implications for the events sector

International travel

shutdown



consequences for trade exposed regions

Intrastate leisure travel

+8.1%



benefits for destinations in driving distance of major population centres

Looking to the future

Both globally and locally, destinations are taking the opportunity presented by the pandemic to redefine their tourism offering – if we don't grab this opportunity to push forward, we will be left behind.

Tourism's contribution

The tourism industry is a force for good. Not only does it provide economic opportunities for individuals and communities, but it connects people across boundaries and with the natural environment.

Tourism delivers social, environmental, and economic benefits that make for a better future.

Social benefits

Tourism provides people an opportunity to share and experience new places, cultures, and ideas. It enhances understanding, breaks down barriers and can create a more cohesive society.

Research shows that visitors are constantly learning and seek out tourism experiences to enhance their knowledge.

Preserving history

Around the world museums care for historic artifacts and showcase their history to the public. They bring history to life, telling stories from the past to make an impact today. Tourism plays an important role in supporting these institutions and bringing history to life.

Celebrating culture

Cultural tourism experiences, performances, museums and galleries offer a window into the lives and history of other people, ideas and ways of life. Tourism can give First Nation cultures a greater voice, a platform to showcase their culture and celebrate their identity.

Economic opportunities

Tourism is a strong employer, providing a wide range of job opportunities from entry level to executive level positions.

Prior to COVID-19, Queensland's 57,000 tourism related businesses employed 234,000 people. This represented 9.3% of the state's workforce, more than mining and forestry, agriculture and fishing combined.

Prosperity of allied industries

Visitors provide economic benefit to many industries. Industries such as retail, hospitality, transport and the Arts are often geared towards local customers but will frequently service visitors.

Prior to COVID-19, tourism contributed \$28.4 billion to the Queensland economy, including \$14.5 billion through related activities, and accounted for \$8 billion in export earnings.

Environmental protection

Tourism experiences showcase natural assets, promote conservation values and enhance environmental outcomes.

Conservation tourism has demonstrated that visitors can make a positive contribution to the protection of the natural environment.

International education

International education provides a clear example of the social and economic benefits made possible through tourism.

In 2019, in addition to the 144,858 international students on a student visa, there were 22,800 non-student visa holders studying English in Queensland. These students gain a life-long connection to Queensland.

In 2019, over 30,700 visitors to Queensland came to visit an international student accounting for over 482,000 visitor nights.

International education contributed \$5.8 billion in export earnings in 2019.

Tourism's regenerative potential

Around the world, people are recognising the regenerative capacity of tourism – the power of tourism to not only contribute to social, environmental, and economic outcomes, but to create a future better than before.

When done right tourism can improve understanding and tolerance, amplify stories from the past, bring natural environments back to life and sustain local economies, providing jobs for people – young and old, now and into the future.

What more can we do to maximise the benefits of tourism for people and communities across Queensland? Our Action Plan for Tourism Recovery will set a vision for Queensland's tourism industry that delivers on the benefits of tourism.



Noosa Main Beach
Tourism and Events Queensland



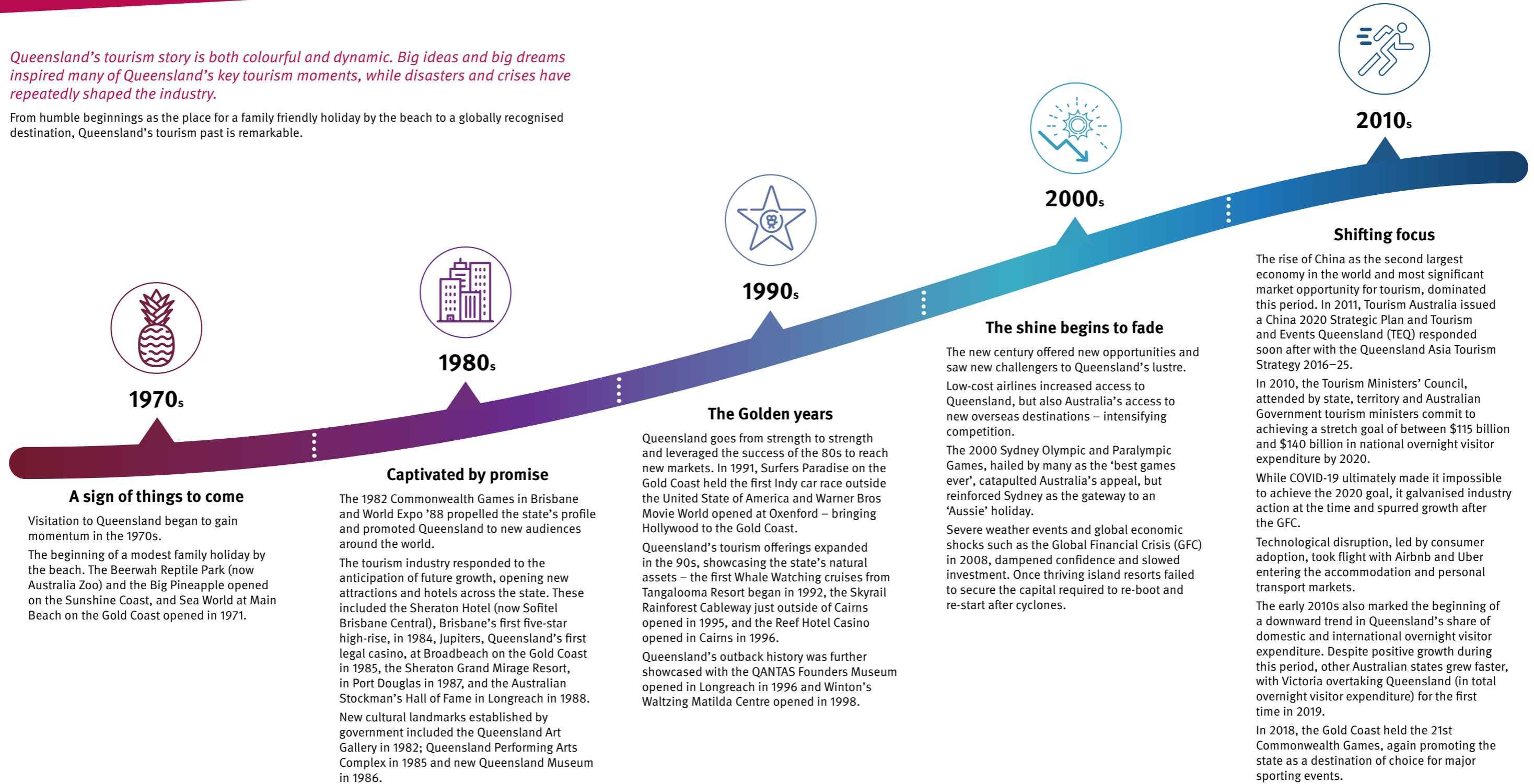
Questions:

1. What could be done at a local level to increase the benefits of tourism?

QUEENSLAND'S TOURISM PAST

Queensland's tourism story is both colourful and dynamic. Big ideas and big dreams inspired many of Queensland's key tourism moments, while disasters and crises have repeatedly shaped the industry.

From humble beginnings as the place for a family friendly holiday by the beach to a globally recognised destination, Queensland's tourism past is remarkable.



1970s

A sign of things to come

Visitation to Queensland began to gain momentum in the 1970s. The beginning of a modest family holiday by the beach. The Beerwah Reptile Park (now Australia Zoo) and the Big Pineapple opened on the Sunshine Coast, and Sea World at Main Beach on the Gold Coast opened in 1971.



1980s

Captivated by promise

The 1982 Commonwealth Games in Brisbane and World Expo '88 propelled the state's profile and promoted Queensland to new audiences around the world. The tourism industry responded to the anticipation of future growth, opening new attractions and hotels across the state. These included the Sheraton Hotel (now Sofitel Brisbane Central), Brisbane's first five-star high-rise, in 1984, Jupiters, Queensland's first legal casino, at Broadbeach on the Gold Coast in 1985, the Sheraton Grand Mirage Resort, in Port Douglas in 1987, and the Australian Stockman's Hall of Fame in Longreach in 1988. New cultural landmarks established by government included the Queensland Art Gallery in 1982; Queensland Performing Arts Complex in 1985 and new Queensland Museum in 1986.



1990s

The Golden years

Queensland goes from strength to strength and leveraged the success of the 80s to reach new markets. In 1991, Surfers Paradise on the Gold Coast held the first Indy car race outside the United State of America and Warner Bros Movie World opened at Oxenford – bringing Hollywood to the Gold Coast. Queensland's tourism offerings expanded in the 90s, showcasing the state's natural assets – the first Whale Watching cruises from Tangalooma Resort began in 1992, the Skyrail Rainforest Cableway just outside of Cairns opened in 1995, and the Reef Hotel Casino opened in Cairns in 1996. Queensland's outback history was further showcased with the QANTAS Founders Museum opened in Longreach in 1996 and Winton's Waltzing Matilda Centre opened in 1998.



2000s

The shine begins to fade

The new century offered new opportunities and saw new challengers to Queensland's lustre. Low-cost airlines increased access to Queensland, but also Australia's access to new overseas destinations – intensifying competition. The 2000 Sydney Olympic and Paralympic Games, hailed by many as the 'best games ever', catapulted Australia's appeal, but reinforced Sydney as the gateway to an 'Aussie' holiday. Severe weather events and global economic shocks such as the Global Financial Crisis (GFC) in 2008, dampened confidence and slowed investment. Once thriving island resorts failed to secure the capital required to re-boot and re-start after cyclones.



2010s

Shifting focus

The rise of China as the second largest economy in the world and most significant market opportunity for tourism, dominated this period. In 2011, Tourism Australia issued a China 2020 Strategic Plan and Tourism and Events Queensland (TEQ) responded soon after with the Queensland Asia Tourism Strategy 2016–25. In 2010, the Tourism Ministers' Council, attended by state, territory and Australian Government tourism ministers commit to achieving a stretch goal of between \$115 billion and \$140 billion in national overnight visitor expenditure by 2020. While COVID-19 ultimately made it impossible to achieve the 2020 goal, it galvanised industry action at the time and spurred growth after the GFC. Technological disruption, led by consumer adoption, took flight with Airbnb and Uber entering the accommodation and personal transport markets. The early 2010s also marked the beginning of a downward trend in Queensland's share of domestic and international overnight visitor expenditure. Despite positive growth during this period, other Australian states grew faster, with Victoria overtaking Queensland (in total overnight visitor expenditure) for the first time in 2019. In 2018, the Gold Coast held the 21st Commonwealth Games, again promoting the state as a destination of choice for major sporting events.



Questions:

2. How do you want Queensland tourism to be defined in the 2020s?

QUEENSLAND IS POSITIONED FOR SUCCESS

Queensland has much to be proud of. Our state boasts some of the most spectacular natural landscapes in the world, the Great Barrier Reef and is home to the world's longest continuing living cultures.

Queensland's natural strengths

Queenslanders have every reason to be proud hosts to visitors.

Queensland's diverse topography offers visitors golden beaches, lush tropical rainforests, wide-open outback landscapes, reefs teeming with life and island paradises.

The Great Barrier Reef is the world's largest reef system – bigger than Italy.

Queensland boasts more than 1,000 National Parks and other protected areas, covering 14.2 million hectares of the state, and five UNESCO World Heritage sites.

Depth and breadth of Queensland's tourism experiences

Queensland's 13 tourism regions offer a diversity of rich experiences that leverage their unique character and assets.

Queensland's tourism workforce and people are capable and committed – supported by world class centres for tourism and hospitality education and research.

Queensland's tourism infrastructure

Queensland has a reliable and efficient infrastructure providing connectivity and convenience across the state.

- Four international passenger airports
- 191 regional airports
- 20 strategically located seaports
- 8,250 kilometres of railway
- 33,336 kilometres of roads

What is it about Queensland and our tourism industry that you are most proud of? Our Action Plan for Tourism Recovery will build on Queensland's many strengths.



Snapshot of Queensland's tourism regions



TROPICAL NORTH QUEENSLAND – Refreshingly vast, astoundingly diverse and filled with ancient wisdom
Known for: Diving and snorkelling on the Great Barrier Reef, World Heritage rainforests gorges and waterfalls, and authentic Indigenous experiences



TOWNSVILLE – Learn from those protecting and improving our world
Known for: Marine conservation and research programs, music festivals and sporting events



WHITSUNDAYS – An extraordinary natural paradise
Known for: Island hopping, sailing and reef tours



MACKAY – Explore untouched nature
Known for: Playing like a local at uncrowded beaches



SOUTHERN GREAT BARRIER REEF – Abundant marine life, pristine and accessible nature



CAPRICORN
Known for: Island cruises, diving and snorkelling, limestone caves, sandstone gorges and sapphire gem fields



GLADSTONE
Known for: Hiking, walking and 4WD, deep sea and inland fishing



BUNDEBERG
Known for: Mon Repos turtle nesting and hatching, iconic beverages and regional food markets



FRASER COAST – As extraordinary as it is approachable
Known for: Whale watching, dolphin tours, turtle spotting and Fraser Island



SUNSHINE COAST – From coastline to hinterland, warm locals and thriving environment
Known for: Secluded beaches, beachfront dining, coastal and hinterland walks, mountain vistas, art galleries, food and wine markets



BRISBANE – A future facing city with timeless nature in its soul
Known for: Alfresco dining and bars, outdoor markets and leisure spaces, exhibitions, entertainment, and sporting events



GOLD COAST – A vibrant gathering place that inspires play
Known for: Golden surf beaches, surf clubs, entertainment, sporting and lifestyle events, adrenaline activities and rainforest hinterland



SOUTHERN QUEENSLAND COUNTRY – An abundant, colourful and thriving country setting
Known for: Natural beauty, history and heritage, authentic country life, and local produce



OUTBACK QUEENSLAND – An ever changing and wide-open landscape
Known for: Historic towns and museums, and dinosaurs digs, tours, centres and trails

Questions:

3. How do we make the best use of our tourism assets? In your own words, what is missing?
4. What practical measures can and should be taken to ensure tourism helps regenerate natural environments, and bring greater awareness as well as economic benefit?



CHANGING VISITOR HABITS

The global tourism industry was changing long before COVID-19, with the pandemic spurring further change in ways that are both obvious and unexpected.

Trends spotted before COVID-19

Visitors are becoming more adventurous, considerate, and conscious about their travel choices

Research by Tourism Australia found that 74% of visitors are actively seeking travel experiences that allow them to give back to a destination. Booking.com has also found that 55% of international visitors want to see how their spending will go back into supporting the local community.

Increasing concern around global warming and the fear of 'flight-shame' is driving more visitors to offset the carbon emissions of their travel. The International Air Transport Association, representing 290 airlines, plans to reduce emissions by 50% by 2050.²

The Tourism and Transport Forum has reported that nature-based visitor numbers rose 49% in the five years since 2012, outpacing international visitor growth.³

The 2018 Adventure Tourism Development Index ranked Australia as number 10 among developed countries, below New Zealand (4) and Canada (7).⁴

In Australia, demand for Indigenous tourism experiences has grown 5% per year in the six years to 2019. This growth is anticipated to surge further as visitors seek out enriching authentic experiences.

Visitors expect technology to be used to deliver simpler and more cost-effective products and services

As many as 79% of Australians now use social media and over half of those check it five times or more a day, according to research by Sensis.⁵ In 2020, 65% of people researching through social media were looking for holiday, travel and accommodation products.⁶

Tourism Research Australia has found that half (49%) of domestic travellers used sharing economy services while travelling.

They did so to save money, access a larger range of offerings and because it was easy to use.⁷

The global economy continues to shift from West to East with unpredictable implications

Back in 2012, the CSIRO predicted that in coming decades rapid income growth in Asia will see billions of people transition to the middle class, shifting economic opportunity from the West to the East.

The World Economic Forum projects that India will be the world's most populated country by 2027,⁸ while other researchers are now predicting that China's economy will become the world's largest by 2028.⁹

Rising competition between the United States of America and China around issues such as trade has weakened the international system and is changing the rules that countries play by, with potential consequences for future tourism flows.

Trends accelerated by COVID-19

Safety has become a front-of-mind concern for consumers

The World Travel & Tourism Council has reported that health and safety have become paramount in the current era. Cleanliness and health measures are now being carefully assessed by visitors.

TEQ has witnessed a rise in 'safety and security' as a hygiene factor for visitors to a front-of-mind concern during COVID-19.

Respondents to a Booking.com survey indicated that 79% of travellers will take more precautions in future, and 70% will only book a particular accommodation if it is clear what health and hygiene policies it has in place.¹⁰

This trend presents an opportunity to convert outbound Australian tourists to more frequent domestic visitors, improving the efficiency of tourism marketing and promotion over time.

Concerns for safety are impacting the time it takes to book and stay

The fear of being 'stuck' as travel restrictions change suddenly as a result of the COVID-19 pandemic has spurred strong demand for last-minute bookings.

TEQ has reported booking lead times have shortened during the COVID-19 pandemic as well as a preference for visitors to book directly with providers.

Visitors are travelling closer to home as they seek out the familiar

Intrastate tourism, particularly in South East Queensland and adjacent tourism regions, has spiked as consumers stick to familiar destinations closer to home.

People are also more likely to travel with people they know. In the six months to December 2020, travelling with friends and relatives, as a couple and as a family were more common than visitors travelling by themselves.

TEQ adds that consumers are now looking for their holidays to deliver 'simple joys', reconnecting with loved ones, relaxing holidays, and experiencing nature while local product takes centre stage.

The rapid deployment of technology demonstrates what's possible

The World Travel & Tourism Council has found that digital technologies are on the rise due to the COVID-19 pandemic with 66% of consumers using more contactless solutions and 45% ready to swap their paper passport for a digital alternative.¹¹

Research by Booking.com added that 63% of people booking accommodation say providers need to be using the latest technologies to make them feel safe.¹²

TEQ also points out that the abrupt move to remote work has changed the way people see their work-travel choices.

With the shift to remote working people are now more likely to use this flexibility to holiday longer.

Airlines are re-thinking their options as they re-set global aviation routes

Innovation is accelerating in the transportation industry, driven by advances in technology, ultra-light materials, and growing demand for more environmentally conscious solutions.¹³

As airlines re-set after COVID-19, the technology and planes they can deploy will change the game for consumers and destinations alike.

Airlines have also downsized fleets as a result of travel restrictions. As the world re-opens smaller fleet sizes will increase competition for destinations trying to re-build aviation capacity.

Safety meets premium to re-define value for money

Value for money continues to be a key consideration for visitors, however what value means varies for different people. COVID-19 and the search for safe, clean, and familiar products and services means these features are more valuable and more important to delivering value for money.

Premium and luxury tourism experiences have a potential advantage after COVID-19 if consumers perceive them to be safer than experiences that might involve many people or large crowds.

Tourism and travel after COVID-19

We are already seeing encouraging signs in relation to domestic travel, but the international outlook remains difficult to predict.

Recovery will vary by country and region, and variation in rules and policies will affect timing and growth. Under the current forecast it could take until 2024 for international tourism numbers to return to 2019 levels. The Asia Pacific region is likely to perform the best in the recovery phase, leading to 2024.¹⁴

Our Action Plan for Tourism Recovery will need to respond to changing visitor habits. We will need to be flexible and adapt to remain relevant and in-demand.



Questions:

5. Do you see any additional trends or emerging changes that we must also consider?

FUTURE PROOFING QUEENSLAND TOURISM

COVID-19 presents a unique opportunity to re-set the way tourism is delivered in Queensland and set up our industry for long-term success.

To harness this opportunity, we will need to carefully consider the future we want for our industry and how we can achieve this.

Our vision for the future of Queensland tourism needs to be more than a return to visitor numbers and overnight visitor expenditure recorded before COVID-19.

Going forward, we will need to transform our industry to become more appealing, more dynamic and more resilient.

Around the world, destinations are also taking the opportunity to re-set their approach to tourism. The future is likely to be very competitive.

Industry and government must work together to design the future we want.



*Boodjamulla National Park
Tourism and Events Queensland*



Appealing

Queensland's reputation as a safe, clean, and green destination is more valuable than ever due to COVID-19. We will need to leverage what we have and create new experiences to appeal to future visitors.

OPPORTUNITIES MAY INCLUDE:

Repositioning Queensland as an adventure tourism hub

Our interstate competitors are successfully integrating tourism activities into National Parks with great success. The Three Capes Track in Tasmania builds on the Overland Track to provide a multi-day walking experience down the Tasman Peninsula. With upgraded facilities and options for overnight stays the Three Capes Track has become globally recognised and in demand.

Re-thinking beach tourism

Queensland simply has the best beaches in the world – hands down. But in destinations like Santorini in Greece, Cala Jondal in Ibiza and Positano in Italy, the beach is a hive of activity, a mecca for entertainment and hospitality experiences that build on the beach experience. What is the Queensland beach experience we want to be known for in the future?

Expanding Queensland's Indigenous tourism offering

Queensland is home to vibrant First Nations cultures in both Aboriginal and Torres Strait Islander people. Queensland has some examples of Indigenous tourism, offering authentic cultural experiences, but can we do more?

Re-invigorating Queensland's urban villages and late-night economy

Queensland's sub-tropical city centres have a unique identity and flavour. The great outdoors, our fresh produce, coffee and booming craft brewing industry provide clear motivations to explore our urban villages, staying later and longer.

Investing in home-grown events that drive visitation and stay in Queensland

Prior to COVID-19, Queensland's events calendar provided a wide range of reasons for visitors to come to Queensland. How do we rebuild an events calendar that creates enduring events that appeal to visitors now, but also grow into the future?



Dynamic

COVID-19 has spurred collaboration between industry and government. We will need to further accelerate Queensland's decision-making processes to deliver future outcomes.

OPPORTUNITIES MAY INCLUDE:

Unlocking the regenerative potential of tourism for the benefit of Queensland communities and environment

Around the world, people are starting to take a different approach to tourism. Hawaii's Tourism Board is offering free hotel stays to visitors who volunteer their time. The program is about offering a trip that gives back to Hawaii and to the visitor. Regenerative tourism offers a new way of thinking about how to deliver tourism in Queensland.

Simpler project facilitation

Queensland's tourism industry has a history of big ideas but bringing them to life can sometimes be a challenge. What stops ideas from becoming a reality in Queensland?

Regulatory reform to enable new products and experiences

We know that there are some rules that can stop tourism businesses from doing things differently. We need you to tell us what these are and consider whether they remain fit-for-purpose.

Re-building aviation access through focused investment

Queensland has developed aviation routes and built access to and from the state. But will the current approach work to re-build access after COVID-19? Changes in airline technology are re-defining the capability and capacity of airplanes. How do we capitalise on these opportunities to reach new markets and strengthen existing ones?

Accelerating innovation in tourism through technology adoption and new ideas

Queensland has been an innovation powerhouse in many ways, but how can we harness this success to lift the digital capability of the whole industry and bring new ideas to life? How can we make Queensland the most bookable destination out there?

Activating Queensland's international alumni network to promote future opportunities

Over the past decade, tens of thousands of international students have called Queensland home. How can we better leverage students who have returned home after experiencing what Queensland has to offer?



Resilient

Queensland's tourism industry, businesses and people have adapted well in response to COVID-19. We will need to build on this flexibility to become more resilient and sustainable in the future.

OPPORTUNITIES MAY INCLUDE:

Improving the skills and capability of tourism businesses and their staff

Behind every great tourism experience are people with the capability to do a great job. How can we better equip people with the skills they need to be successful in the future?

Attracting top talent to the industry, through opportunities to live, work and play

Tourism offers unique career opportunities and an incredible lifestyle. How can we inspire more people to see tourism as a long-term career and embrace the live, work and play lifestyle it can offer?

Reaching ever higher standards to grow our industry

Queensland's relative success at containing the spread of COVID-19 has positioned the state as a safe and clean destination. How can we embed new standards and use accreditation to deliver on the quality now expected by visitors? How do we give people and business owners the skills they need to be successful in the future?

Inspiring more sectors to engage in the visitor economy – showcasing local content

Visitors spend money with a wide range of businesses and allied industries, like retail, hospitality and the Arts. Showcasing local produce can also enhance a tourism experience and provide new customers to local farmers.

Evaluating our target markets and re-balancing our portfolio

The world has changed, and we need to re-think the source markets we need to target for future growth. What emerging markets or new opportunities exist to better balance our future portfolio of visitors?

Re-assessing our approach to reaching new customers

Technology offers new solutions to reach new customers like never before. It is now possible to target individuals based on their location, interests, behaviours, and likelihood to travel. Queensland will need to deploy these techniques like never before to reach future customers.



Questions:

6. What are your ideas for the future of Queensland's tourism industry?
7. What do you see as the obstacles to progress?

NEXT STEPS

Your input will be key to delivering an Action Plan for Tourism Recovery that takes our industry forward.

How to have your say

Submissions are now invited from individuals, businesses, industry associations, tourism organisations, and local, state and federal governments as well as anyone with an interest in the future of tourism in Queensland.

You can share your views by completing an online survey or by making a written submission that responds to one or more of the consultation questions.

For further information about how to have your say, including the online survey and how to lodge a written submission please visit the website: <https://www.dtis.qld.gov.au/tourism/tourism-industry-reference-panel> Or reach out via the email: tourismrecovery@dtis.qld.gov.au

Delivering the Action Plan

This discussion paper is the first step in delivering the Action Plan for Tourism Recovery. It starts a wide-ranging conversation about the future and asks where we want to go, as an industry and how we get there.

We look forward to your thoughts and input.

Following the release of the discussion paper, the Tourism Industry Reference Panel will organise a series of workshops across Queensland.

The Panel will carefully consider all feedback and responses to the discussion paper to deliver an interim action plan by the middle of 2021.

The interim action plan is anticipated to set a vision for the future of Queensland's visitor economy and outline immediate actions to kick-start Queensland's tourism recovery.

Once our vision and actions are agreed, the panel will work with industry and leading experts to consider how we might organise ourselves and resource delivery of the plan over the decade ahead.



*Eat Street Northshore
Tourism and Events Queensland*

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CONSULTATION QUESTIONS IN SUMMARY

The following questions are asked throughout this discussion paper:

1. What could be done at a local level to increase the benefits of tourism?
2. How do you want Queensland tourism to be defined in the 2020s?
3. How do we make the best use of our tourism assets? In your own words, what is missing?
4. What practical measures can and should be taken to ensure tourism helps regenerate natural environments, and bring greater awareness as well as economic benefit?
5. Do you see any additional trends or emerging changes that we must also consider?
6. What are your ideas for the future of Queensland's tourism industry?
7. What do you see as the obstacles to progress?

In addition to these questions, the Panel seeks your views on the following:

8. **What should Queensland be doing to re-set, transform and embrace the opportunities a post COVID-19 world presents?**

