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2 July 2021

Ms Liz Savage
Chair
Tourism Industry Reference Panel

Email: tourismrecovery@dtis.qld.gov.au

Dear Ms Savage

ACTION PLAN FOR QUEENSLAND TOURISM RECOVERY

Moreton Bay Regional Council welcomes the efforts made by the Queensland Government to revitalise tourism in the State and to ensure the industry is more resilient going forward. The establishment of the Tourism Industry Reference Panel and commitment to prepare an Action Plan for Tourism Recovery are welcome steps.

Council is pleased to contribute to the consultation for the Action Plan, as well as broader discussions about the changing future of tourism within our region and our State, as visitor economies continue to shift in response to the COVID-19 pandemic.

Our submission focuses on two elements:

1. The role of tourism in our local economy and the increasing need to differentiate our region from the neighbouring and distinct regions of the Sunshine Coast and Brisbane City; and
2. Practical steps under the Action Plan that the State can undertake/lead on behalf of regions and local economies.

Tourism in Moreton Bay Region and the Impact of COVID-19

The Moreton Bay Region is the third-largest local government area (LGA) and with the fifth-fastest growth rate in the nation and our population is forecast to increase by over 40 percent to around 700,000 people by 2041.

As one of Australia's fastest-growing regions, we are proud to play host to a range of tourists, from inner-city day-trippers, domestic travellers on overnight visits, to international tourists with us for a longer stay.

Our region spans more than 2,000 square kilometres and consists of a number of different and vibrant communities of interest. From seaside villages in the Bay to hinterland hamlets; from urban centres to rural expanses; from suburban living to large business estates; our region has something for everyone.

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Given this diversity of natural and built assets – and an ideal location in Queensland's southeast corner – it is no surprise that since amalgamation 13 years ago tourism has been a critical industry for the Moreton Bay Region. This is recognised in Council's Regional Economic Development Strategy 2020-2041, where tourism is one of four key industries that will drive the region's long-term economic development to greater heights.

By 2041, our ambition is that Moreton Bay Region will be:

- **Bigger:** with our regional economy reaching \$40 billion in 2041, more than double its current size.
- **Bolder:** through the creation of 100,000 new jobs and 16,000 new businesses.
- **Brighter:** by focusing on our growth and talent and making Moreton Bay one of the top 10 regional knowledge and innovation hubs in Australia.

Prior to the COVID-19 pandemic, the Moreton Bay Region was experiencing a golden era of tourism growth, following Council's strategic focus and investment in marketing and developing this industry over a number of years and the support and collaboration of industry and partners.

Approximately 4.1 million visitors each year contributed more than \$1 billion to the regional economy, translating into a rise from 1000 tourism businesses in the region in 2015 to more than 3200 businesses in 2019, supporting a total of more than 6500 jobs.

However, the COVID-19 pandemic has taken a toll on tourism industries throughout Australia, with the loss of international visitors, closure of internal borders and restrictions on public gatherings creating new and complex challenges for business. Our region has been hit particularly hard, experiencing a significant reduction in domestic visitor spending in addition to the loss of expenditure from international tourism.

For the year ending December 2020, the impact on the tourism industry within the Moreton Bay Region is clearly demonstrated by the following data:

- The number of domestic visitor nights was down 26 per cent on the year ending December 2019, and 35 per cent on the year ending December 2018;
- The number of international visitor nights was down 84 per cent on the previous year;
- The combined loss of visitor nights totalled 3,390,839 less visitor nights than the year prior;
- At an average daily spend of \$184 for domestic overnight visitors to the Brisbane area, tourism spend by overnight visitors in the Moreton Bay Region is estimated to be down by about \$625 million for the 2020 calendar year;
- The number of domestic day visitors was also down 16 per cent on the year ending December 2019; and
- The loss of over 588,000 visitors in 2020 is estimated to translate into a further \$61 million in lost visitor spending, at the average regional daily spend of \$103 per visitor.

As the Moreton Bay Region's tourism industry has experienced an estimated loss of \$685 million in day and overnight visitor spending in the 2020 calendar year, the LGA has been impacted to a greater extent than the tourism destination regions of the Whitsundays, Southern Queensland Country, Fraser Coast, Outback Queensland and even Townsville, which has experienced a loss of 3,221,140 domestic and international visitor nights in the same period. In fact, the loss of visitor nights in the Moreton Bay Region LGA equates to 54.5 per cent of the total loss of visitor nights for the entire Sunshine Coast destination region, which includes Noosa and the Cooloola areas.

This data demonstrates the profound impact the COVID-19 pandemic has had on the functioning of visitor economies around the world, with some shifts likely to endure once the health threat has receded and international movement resumes. For instance, the increased desire amongst visitors to stay close to home and explore their own backyard is unlikely to be erased by the reopening of external borders.

Council recognises the opportunity this presents for the Moreton Bay Region due to its strategic proximity to the State's largest population centres of Brisbane, the Gold Coast, and the Sunshine Coast. However, the ability to capitalise on this will require coordination between the tourism sector and all three levels of government, with our Council and local tourism industry achieving increasing recognition for pro-active leadership and collaboration in this regard.

As the Moreton Bay Region, with 3.2 million day-visitors per year, accounts for one of the largest day visitor leisure markets in Queensland, the relevance of the Moreton Bay visitor economy to the overall performance of tourism in the State is notable. Local economies and local employment in Bribie Island, Redcliffe, Samford Valley, The Hills District and Caboolture rely heavily on maintaining this market share.

Moreton Bay as a Distinct Tourism Region

In line with the Moreton Bay Region's status as the third-largest LGA in Australia, where almost 10 per cent of the Queensland population currently resides, the State Government acknowledged Moreton Bay as one of 13 distinct regions for the first time in the 2021-22 State Budget. Council welcomed this significant move not only in planning for current and projected levels of growth, but in Council's continuing efforts to establish a unified, regional identity and brand following amalgamation. Actions such as this ensure the particular needs of our burgeoning region are met, while also aiding in disseminating our name and lifestyle on a larger stage.

Despite this, tourism strategy at the State level currently presents the Moreton Bay Region as a subset of the wider Brisbane area, rather than a destination in its own right with tourism funding essentially pooled across eight diverse LGAs. This generalised approach to marketing has implications across a number of areas, most notably for the tourism industry where recognisable branding is key to encouraging visitation.

This arrangement has raised concerns for Council over how funds are distributed and prioritised between each region, particularly for those outside the city and its immediate surrounds.

In the discussion paper, the Brisbane tourism region – of which the Moreton Bay LGA forms a part – is described as 'a future facing city with timeless nature in its soul' that is known for 'alfresco dining and bars, outdoor markets and leisure spaces, exhibitions, entertainment, and sporting events.'

Moreton Bay and its unique blend of coast and hinterland; urban and rural; suburbs and industry are effectively omitted from that conversation.

This lack of visibility for the Moreton Bay Region presents a clear obstacle to increasing visitation and awareness of already undervalued destinations. As shown in the attachment to this letter, the Moreton Bay Region:

- Outperforms many other Regional Tourism Organisations/Areas for number of day trip visitors;

- The region accounts for 6.4 per cent of all day trips that occur in Queensland and 18.2 per cent of all day trip visitors to the wider Brisbane destination;
- Overnight trips for the December 2020 quarter outpaced other Regional Tourism Organisations/Areas including Bundaberg, the Whitsundays and Gladstone; and
- The region had three of the Top 10 overnight visitor destinations at an SA2 category level (Bribie Island, Redcliffe and Caboolture).

It is worth noting that the tourism market for the Moreton Bay Region is quite distinct to the Brisbane City market, and as such, Council believes it is essential for the Moreton Bay Region to be presented as distinct from Brisbane with its own recovery strategy, in order to capitalise on our region's considerable potential and fulfill the goals outlined in the Regional Economic Development Strategy 2020-2041.

To this end, we recommend that the forthcoming Action Plan redefines Queensland's tourism areas to more accurately reflect the distinct tourism assets and experiences on offer both within our region and across the state, by including, at a minimum, a stand-alone Moreton Bay Region.

Such a step would ensure that available funding is targeted towards supporting unique local tourism opportunities and experiences without necessarily requiring a change to the total funding envelope. In addition, it could encourage additional inter- and intra-state visitors, as the public becomes more aware of a wider range of Queensland destinations and assets on offer.

Practical steps for the State to undertake/lead on behalf of regions and local economies

With regard to the Action Plan proper, the State has an opportunity to invest in practical steps in support of local governments, regional tourism bodies and destinations in addressing the question it poses '*What could be done at a local level to increase the benefits of tourism?*' by:

1. Recognising the impact on the tourism experience of vacant shop fronts in retail precincts and high streets across Queensland and supporting their activation;
2. Activating beach areas/precincts and increasing the number and type of on-beach permissible uses (in certain locations and following community consultation);
3. De-risking event delivery and attraction with a range of event management tools, workshops for community groups, and State-backed public liability insurances and other large event costs;
4. Giving consumers confidence through the adoption of technology solutions that make being a tourist easier and expand their horizons;
5. Partnering with local governments that have projects and funding to bring online new tourism experiences which keep tourists in Queensland longer and more engaged.

Recognising the impact on the tourism experience of vacant shop fronts in retail precincts and high streets across Queensland and supporting their activation

The focus for too long has been on creating new activities or experiences, often forgetting that our retail precincts and high streets leave a lasting impact on existing tourists. The State could develop an asset base which includes:

- Retail shop decals which promote tourism products in the region instead of unattractive for lease signs on vacant retail shopfronts;

- Identify ways to manage landlord risk (similar to the Renew Australia model) to allow pop-up shops, ticket sales and promotion of experiences;
- Partners with Councils and provides funding for activations involving the Arts community (such as the Anywhere Festival, buskers and other performances) which can transform these spaces during the day and night and create vibrancy and flow of business to local retailers; and
- Providing a small grants program for event promoters and tourism experience booking agents to establish time-limited pop up shops in high foot traffic areas, where there are no visitor information services or the like.

Activating beach areas/precincts and permissible uses (in certain locations following community consultation)

Our beaches are very busy during the day, but often empty at night. Investment in lighting, lasers or other infrastructure could complement existing local government assets such as barbecues and picnic tables, to create a more vibrant space for the community and tourists and night-time activities including markets and outdoor sports like beach volleyball and football.

There is also an opportunity to activate certain beach areas with a concierge-type service including chairs, cabanas, and food and drinks and other complementary beach sports services.

De-risk event delivery and attraction with a range of event management tools, workshops for community groups, and State-backed public liability insurances and other large event costs

Most community groups are run by volunteers and many see events as a way to generate revenue, but many have limited experience and can struggle to execute well. There is an opportunity for the State Government to:

- Appoint local event management experts across the State to provide a certain number of hours to help community events that link to/benefit tourism/tourists, to develop their ideas and walk them through the event management planning and delivery process;
- Development of various checklists and tools and a 'go to' group to assist managing the complex elements of applications and meeting event management requirements (e.g. traffic management plans, Queensland Police Service, Department of Transport and Main Roads and local law requirements);
- Identify blockages to event delivery such as the high cost of public liability insurance and provide industry coverage/rates on a whole-of-industry/consolidated basis to lessen the burden on event organisers; and
- Provide insurance cover, funded by the State, for events that get cancelled due to natural disasters, including pandemics.

Giving consumers confidence through the adoption of technology solutions that make being a tourist easier and expands their horizons

Safety has been identified as a priority by tourists. In addition to improving lighting at key tourist areas as identified earlier, the State could use various technology solutions that assist tourists on their 'tourism journey' by white-labelling a technology solution to track their progress (e.g. self-drive through the Moreton Bay Region hinterland) and alert key contacts if the journey changes or they don't check in. There are a number of 'lone worker/journey' providers in Australia supplying to major national/international brands and the Moreton Bay Region is proud to have a company assisting in the 'lone journey/worker' solution.

There is also the opportunity to partner with technology companies on a white label market product (by region) to promote experiences and activities and make it easier for local companies to offer products/services and the technology to bundle experiences. Such a solution would always look to upsell experiences which in turn increases the potential of the tourist to stay longer in a region and experience more activities.

Through the State supporting the implementation of an online booking platform that allows for bundling and discounting of any provider that opts in, more visitors will be motivated to spend more. This approach could be easily integrated into existing Regional Tourism Organisation 'visitor' platforms.

Partner with local governments that have projects and funding to bring online new tourism experiences which keep tourists in Queensland longer and more engaged

The Moreton Bay Regional Council has completed a project which has identified 67 potential new tourism assets/experiences for our region which require a combination of government and/or private sector funding. Our Council has put aside funding to explore the feasibility of these projects, however, support from the State – be it via partnerships, funding or seeking private investment – would be of significant assistance in bringing these projects to life. The State should work with councils committed to this space and ready to deliver on such projects, as it will create a range of new experiences and activities to enable tourists to stay and play longer.

Recommendations

In light of the particular circumstances of the Moreton Bay Region outlined throughout this submission, Council puts forward the following recommendations:

1. That the forthcoming Action Plan redefines Queensland's tourism areas to more accurately reflect the distinct tourism assets and experiences on offer both within our region and across the State, by including, at a minimum, a stand-alone Moreton Bay Region.
2. That the State Government undertake practical steps in support of local governments, regional tourism bodies and destinations to increase the benefits of tourism, including:
 - a) Recognising the impact on the tourism experience of vacant shop fronts in retail precincts and high streets across Queensland and supporting their activation;
 - b) Activating beach areas/precincts and increasing the number and type of on-beach permissible uses (in certain locations and following community consultation);

- c) De-risking event delivery and attraction with a range of event management tools, workshops for community groups, and State backed public liability insurances and other large event costs;
- d) Giving consumers confidence through the adoption of technology solutions that make being a tourist easier and expand their horizons;
- e) Partnering with local governments that have projects and funding to bring online new tourism experiences which keep tourists in Queensland longer and more engaged.

Should you require any additional information to support this submission, please contact Joshua O'Keefe, Manager Strategy and Advocacy, on (07) 3205 0555.

Yours sincerely



PETER FLANNERY

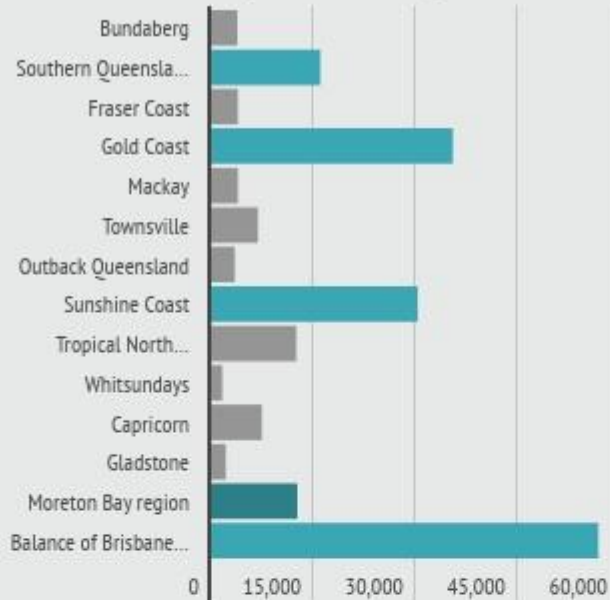
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01 Moreton Bay Region - Role In Queensland Tourism Results

Moreton Bay Region Fifth most visited day destination in Qld



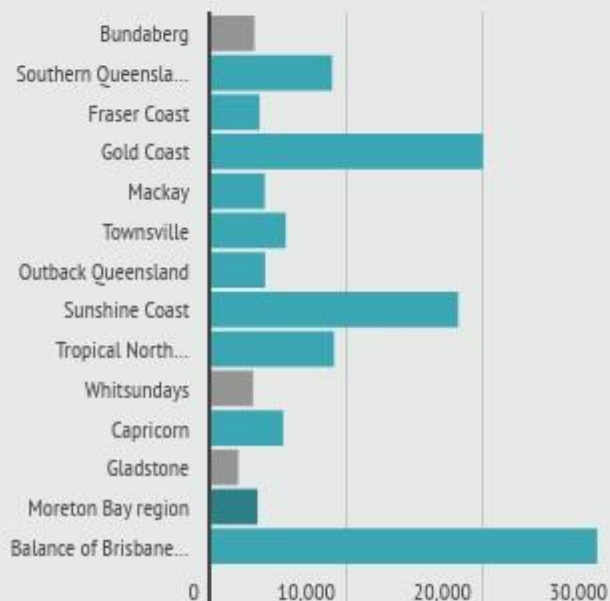
Daytrips (000) - Dec 2020 Quarter

Moreton Bay Region, as a sub-destination, outperforms many Regional Tourism destinations in Queensland, for number of day visitor trips.

The Region accounts for 6.4% of all day trips that occur in Queensland and 18.2% of all day visitor trips to the wider Brisbane destination.

In the Dec 2020 quarter, the Bribie Island SA2 had the third highest number of visitors of all Qld SA2s - beaten by Brisbane City and Ipswich City only. Redcliffe SA ranked 5th and Caboolture 6th.

Outperforms a number of Regional Tourism Destinations



Overnight Trips (000) - Dec 2020 Quarter

While the number of overnight trips to Moreton Bay Region are a fraction of the day time visitor trips, the results for the sub-region still exceeds the overnight trips to:

- Bundaberg Destination
- Whitsunday Destination, and
- Gladstone Destination.

From a small area perspective, the SA2 areas of Bribie Island, Caboolture and Redcliffe ranked 4th, 7th and 9th in terms of areas that received the highest number of overnight visitor trips in Queensland.