QUEENSLAND
TOURISM INDUSTRY
COUNCIL

RESPONSE TO *DESIGNING OUR TOURISM FUTURE* DISCUSSION PAPER

JULY 2021

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1. QTIC OVERVIEW

The [Queensland Tourism Industry Council](#) (QTIC)[1] is a not-for-profit, private sector, membership-based organisation representing the interests of Queensland's tourism and hospitality industry. QTIC works in partnership with government agencies and industry bodies at a local, state, and national level to strengthen the voice of tourism in all relevant policy forums. QTIC has an extensive reach – our mailing list is sent out to 7,000 people and we have a collective social media following of more than 22,000 people, across four different platforms. Our membership comprises more than 1,000 tourism businesses across the state, and we also work alongside 13 Regional Tourism Organisations (RTOs) which collectively represent more than 3,000 regional businesses and 18 industry sector associations.

Our efforts are aimed squarely at helping the tourism industry to drive sustainable business and product development, stimulate business attraction and investment, develop workforce skills, and support tourism jobs and business. In 2019, tourism in Queensland was a $27.3 billion industry that sustains 237,000 Queensland jobs across 55,000 entities. [2]

The challenges faced by the tourism sector over the past 18 months, ranging from natural disasters, COVID-19, and associated international and national border closures have been complex. They have overshadowed some of the longer-standing challenges faced by the tourism industry. As the world emerges from COVID-19 restrictions and Queensland looks to re-build its economy, these issues need to be addressed swiftly and effectively to enable growth in a sector that is the fourth largest exporting industry in Australia, accounting for 8.2% of national export earnings in 2018-19[3] and contributing nearly $27 billion in revenue to the Queensland economy in 2019. Tourism is also a major employer, with an estimated 202,6000 people in Queensland's workforce supported by the sector in 2019-20[4].

QTIC aims to provide an independent conduit to bring key stakeholders (consumers, the tourism industry, and government) together to clearly identify challenges and opportunities and provide recommendations for consideration.

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[1] https://www.qtic.com.au/
[2] https://www.qtic.com.au/about/
[3] https://www.tourism.australia.com/en/markets-and-stats/tourism-statistics.html
[4] https://www.tra.gov.au/data-and-research/reports/state-tourism-satellite-account-2019-20/queensland-tourism-summary

2. RESPONSES TO DISCUSSION POINTS

2.1 RESPONDING TO CHANGING VISITOR HABITS AND TRENDS

COVID-19 has unleashed the most universal disruption ever experienced on our industry and possibly the entire national and the global economy. Just as technological or economic disruptions have done before, the current scenario not only creates challenges, it also creates a significant opportunity to re-set, re-focus and re-energise tourism in Queensland. The comparatively well-controlled health situation domestically has given us a relatively stable basis to plan and implement not only the recovery phase for tourism but also work towards the longer-term aspirations of the industry.

Every destination in the world is contemplating its place in a COVID or post-COVID environment. Every tourism region will need to map out its own path, based on its attributes, capabilities, and resources. Queensland is well-placed to build on some significant competitive advantages. Given the universality of the challenges that our industry is confronting, it is helpful in this context to consider an instructive, international perspective. A report prepared for and endorsed by the 2021 *G20 Tourism Ministers Meeting: G20 Rome Guidelines for the Future of Tourism*[5] discusses themes that are relevant for government and industry. The G20 Report provides a considered structure and extensive reference points for future planning. The Rome Communique issued by the G20 Ministers, including Australia, states that "the crisis presents an opportunity to rethink tourism for the future". The statement goes on to say that the report is consistent with the G20 priorities of 'People, Planet, Prosperity', with a commitment to actions in seven key policy areas:

1. **Safe mobility:** Developing confidence in safe international mobility, enabling us to support, complement and coordinate with safe international mobility initiatives.
2. **Crisis management:** Minimising the impact of future crises affecting tourism.
3. **Resilience:** Securing a robust and stable tourism sector in uncertain times.
4. **Inclusiveness:** Widening community engagement and benefits from tourism.
5. **Green transformation:** Managing tourism to sustain global and local environments.
6. **Digital transition:** Enabling all tourism stakeholders to benefit fully from digital opportunities.
7. **Investment and infrastructure:** Focusing resources on a sustainable future for tourism.

The report contains numerous observations and recommendations about each of the policy areas that are relevant also for the Australian and Queensland context. We also recommend that current state-based, economic recovery plans and investments should be specifically considered in relation to tourism opportunities. There are significant potentials to align and leverage effort, and investment for greater impact.

The tourism industry is highly supportive of a collaborative and coordinated approach to the challenges ahead.

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[5] https://www.g20.org/wp-content/uploads/2021/05/Communique_final.pdf

2.2 GOVERNANCE AND STRUCTURE

2.2.1 Leadership

Tourism is a complex industry with a supply chain that involves many sectors of the economy, including accommodation and food services, transport, agriculture, retail, arts and recreation, education, communication, construction and more. The industry is relevant to many, if not all, government portfolios and involves all three levels of government. Tourism is also deeply connected to the lives of communities and Queensland residents through the services and commercial opportunities it provides. A well-coordinated approach from government(s), in collaboration with industry is critical to achieve the best outcomes for the state's economy and Queensland's community.

- QTIC recommends that the Queensland government considers allocating overall tourism responsibility to the Premier's portfolio. This has been the successful approach in South Australia and Tasmania. Such a move would support the above overarching recommendation, ensuring that tourism remains as a key state interest and avoids any duplication in services, departments, or legislature.
- The re-establishment of a designated Tourism Cabinet Committee (TCC) would help to set a consistent direction and improve coordination. Such a body would provide oversight and recognise that tourism covers multiple areas of policy and legislation. The TCC could be constituted with Ministers representing relevant portfolios, including Treasury, Environment, Infrastructure, Training and Small Business.
- In addition, we consider that the adoption of a Co-ordinator General or a similar model, with a practical approach to help business navigate legislation and policy, could create an environment to assist in minimising red tape and legislative barriers between the numerous state government departments and local government regulations.

There have been several attempts over the last decade to consider and implement structural changes to tourism industry organisations, namely Regional Tourism Organisations (RTOs), Local Tourism Organisations, Tourism and Events Queensland and QTIC, and re-define relationships and funding. Such plans have not led to any material changes.

- QTIC notes that any structural change should be solely led by identifiable strategy objectives. Reform should only seek change where there is a clear rationale to do so, for example, changes that are necessary to support the delivery of new strategic objectives. Any proposed structural change needs to be supported by both government and industry stakeholders.
- With a coordinated strategy and relevant structures in place, the development of supportive and sustainable funding mechanisms need to be considered.

2.2.2 Regulatory reform

There are still significant regulatory and governments administration processes that act as barriers to developing new tourism products and experiences. Many operators struggle to negotiate regulatory processes and associated red tape, legislation, regulation, and planning acts.

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. Local government planning for many regional areas does not provide a conducive planning and development environment for tourism. The impacts and needs tend to be assessed with planning tools better suited to industrial or residential development.

Government input and commitment, at state and federal level, is also needed to address an acute and worsening crisis in the insurance space. The QTIC *Insurance Cover for the Tourism Industry* report[6] (discussed in further detail below) highlights that the insurance market for tourism property and operations has moved to the point of market failure. For instance, jet-ski operators are unable to secure appropriate insurance cover. Other activities are likely to follow.

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[6]
https://qticazure.blob.core.windows.net/crmblobcontainer/Insurance%20Cover%20for%20the%20Tourism%20Industry_ATIC%20FINAL.pdf

2.3 DESTINATION MARKETING

Queensland is the second-largest state in Australia, covering some 1,727,000km^2. It is a highly diverse state in terms of both environment and culture. This diversity is represented by 13 distinct tourism regions, all of which speak to the unique and memorable aspects that are contained within their respective jurisdictions.

From the rainforests of Tropical North Queensland, the paleolithic history of Outback Queensland and the seasonal flavours of local produce in Southern Queensland Country (as examples), it is impossible to curate a single narrative or cohesive identity about tourism in Queensland[7]. This is where the collective strength of the industry lies – no singular destination is the same as another and there is an array of experiences on offer.

- Much of Queensland's tourism marketing is focused on the state as a whole and tends to lack a call-to-action. Without specific links to individual destinations, potential visitors are less likely to follow through with bookings. Customers are more likely to identify and engage with specific destinations and offers.
- Marketing the state as a cohesive whole has merit but also clear limitations relating to the diversity of places and experiences available. Destination marketing should reflect these diverse needs.
- In essence, there needs to be adequate funding for both, Tourism and Events Queensland and the RTOs, to be able to effectively develop and implement the different marketing strategies to attract visitors to all regions.
- Long-term funding commitments are needed to support the marketing organisations to deliver successful marketing and leverage private investment.

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[7] https://teq.queensland.com/destinations

2.4 LABOUR, SKILLS AND WORKFORCE

The lack of a sufficient workforce is causing numerous challenges and is impacting the economic recovery of the sector in all destinations. While the sector is showing tentative signs of recovery, there was a decline approximate of 57,000 employees across the tourism industry since the beginning of the COVID-19 pandemic[8]. Prior to the COVID-19 pandemic, temporary and skilled migrants were a major source of labour and greatly contributed to the economic stability of the sector. Without access to a sufficient domestic labour pool and skilled international migrants, the recovery and growth of the tourism industry is under acute threat.

QTIC has a longstanding track record in developing workforce and skills programs for the specific needs of the tourism and hospitality sectors in Queensland. Several of these industry programs could easily be expanded and scaled-up in a cost-effective manner. The impetus for some of this program stems from a *Queensland Workforce Plan*[9] that was developed by the Queensland Government in collaboration with QTIC two years ago with 13 regional action plans. Some of the lessons and priorities still have high relevance for regions and destinations across the state.

Future customers are likely to have higher expectations – facilitating opportunities for skills and training must help to match these expectations by supporting the development of new skill sets and capabilities for the existing workforce. Such opportunities for skill development have the additional benefit of promoting tourism and hospitality as sectors with rewarding, meaningful and long-term career paths.

These are some specific recommendations:

1. The Queensland government continue to provide and subsidise labour market programs in those areas that face significant workforce challenges.

2. Activation of mature-aged workers and 'grey nomads' with well-coordinated engagement programs.

3. Government to work with industry (across the state, but with a place-based focus) to identify innovative approaches to labour market needs. The *Queensland Tourism Workforce Plan*[10] and 13 regional plans were developed by Jobs Queensland in collaboration with QTIC and industry and provides a relevant framework. The implementation of relevant action items in the plans should remain as a priority.

4. Supported placement of Indigenous peoples into the tourism industry and support for the creation of new Indigenous-owned and operated businesses, building on the well-established QTIC Indigenous Champions Network.

5. Continued promotion of the *QTIC Careers Guide*[11] and the QTIC Roadshow and Virtual Jobs Platform[12] the latter funded and supported by the Department of Employment, Small Business and Training (DESBT).

6. Funding short-skilling programs specifically for lower-level jobs, including housekeeping, cleaning, front-of-house; building programs to assist with business

[8] QTIC analysis of https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release

[9] https://jobsqueensland.qld.gov.au/wp-content/uploads/2017/07/tourism_workforce_plan.pdf

[10] Ibid, p. 7.

[11] https://qticazure.blob.core.windows.net/crmblobcontainer/QTIC_V8-3.pdf

[12] https://www.qtic.com.au/workforce-development/qtic-virtual-careers-fair-and-careers-roadshows/

development (including yield management); building on QTIC's current [micro-credentialling](#) program with a capacity for upscaling to support vocational recognition programs[13]. During the year-long pilot program in Queensland, more than 12,000 individual training lessons have been delivered to staff so far.

7. For the subsidies associated with Apprenticeships and Traineeships to continue beyond what is indicated in the 2021-2022 State Budget[14].

8. Continued support for the *Tourism Business Capability Program*. The program has been very successful by responding in a timely and flexible way to the skill needs of hundreds of tourism operators. There are few future funding opportunities and consideration should be given to such a tried-and-proven skill delivery model based on the collaboration with RTOs and their regional industry needs.

Further to these recommendations, we highlight the ways that digital disruption and innovation has created both new challenges but also enormous opportunities for tourism. The relationship between consumers, service providers, the distribution system and marketing bodies has fundamentally changed. It is no longer just technology experts who need to be skilled. Instead, most staff need to have some understanding and capacity to adopt digital tools across almost every aspect of business operations.

In 2019, QTIC collaborated with Griffith University, industry stakeholders and government to develop a *Queensland Tourism Digital Workforce Development and Training Plan*[15] that provides some insight on related issues that are applicable across the state.

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[13] https://www.qtic.com.au/workforce-development/Micro-Credentialing/
[14] https://treasury.gov.au/coronavirus/businesses/apprentices-and-trainees
[15] https://gallery.mailchimp.com/d6ad1e58b5e26e87a88e0fc3a/files/bef5ec0d-bdeb-44b2-a628-a374e7e49794/16956_QTIC_WorkforceDevBooklet_prf4_1up.pdf

2.5 INDIGENOUS TOURISM

Australia's First Nations peoples are the oldest living cultures on earth, connecting with country for tens of thousands of years. The _QLD First Nations Tourism Plan_[16], developed by QTIC following extensive consultation with First Nations peoples, tourism industry stakeholders, and key government departments offers a considered guide for future action. The plan sets a framework to leverage our First Nations cultural heritage and stewardship of country, together with regions' distinctive mix of tourism product offerings, to inspire the development of a thriving First Nations' tourism sector that offers diverse, authentic, and engaging, sustainable tourism experiences and promotes greater engagement of First Nations peoples in tourism[17].

This is a summary of the priorities and recommendations from the plan:

1. **Recognition and respect:** Promote recognition and respect for First Nations culture, stories, and connection to country.
2. **Training, skills development, and jobs:** Ensure the First Nations sector is driven by a skilled workforce engaged in quality employment.
3. **Engagement and partnerships:** Encourage the creation of mutually beneficial and strategic partnerships to grow the First Nations tourism sector.
4. **Marketing and awareness:** Position and promote First Nations experiences as a must-do experience while visiting QLD.
5. **Strategic coordination and structure:** Create an entity that gives voice to the First Nations tourism sector and provides advocacy and support.
6. **Authentic product development:** Develop and deliver authentic, quality First Nations products which are export-ready and meet market demand.

QTIC will continue its work in supporting the implementation of the plan and in doing so encourage greater engagement of Indigenous people in tourism. We look forward to also working with the Queensland government and other stakeholders in promoting an inclusive and collaborative approach, based on trust and shared aspirations.

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[16] https://qticazure.blob.core.windows.net/crmblobcontainer/Version%206%20-%20FNTP%20Final%20Version%20-%20High%20res%20Web.pdf

[17] https://www.qtic.com.au/industry-development/indigenous-programs/champions-network/

2.6 RESILIENCE AND SUSTAINABILITY

These related topics are likely to return to prominence and attract much greater attention post-COVID. International agreements that Australia has either endorsed or is a signatory to, including the *Global Sustainable Development Goals*[18] (SDGs) and the highly topical United Nations World Tourism Organisation (UNWTO) *Recommendations for the Transition to a Green Travel and Tourism Economy*[19] report should be considered as relevant reference points for Queensland's strategic direction in relation to these aspirations.

Queensland has largely fallen behind in making the most of its opportunities offered by its natural assets. The *New Zealand-Aotearoa Government Tourism Strategy*[20] offers the best case study for tourism policies relating to environmental sustainability and tourism development.

It appears that a 'cultural shift' needs to be considered that aligns conservation priorities with outstanding visitor experiences. This applies in relation to policy and planning settings and also to very practical, on-the-ground measures such as dedicated park rangers acting as welcoming guides, rather than compliance-focused enforcement agents.

Sustainability in tourism also relies on a wholistic approach across all government policy areas. This in nowhere more evident that in relation to climate change and, for instance the Great Barrier Reef, our most valuable tourism asset. The tourism industry remains committed to work with and support the government in putting in place policy setting that can build Queensland's actions and reputation in sustainability.

Specific recommendations include:

- Statewide support and application of the *Building a resilient tourism industry: Queensland tourism climate change response* plan, developed with the support of the Queensland Government by QTIC in collaboration with Griffith Institute for Tourism, which seeks to engage operators with the challenges emerging from climate change[21].
- Encouraging tourism businesses to engage in climate certification programs, such as those developed by EarthCheck[22] and Ecotourism Australia.[23]
- The recommendations from the *UNWTO Recommendations for the Transition to a Green Travel and Tourism Economy* report, which Australia has endorsed, should form the basis for future policy and legislative reform.[24]

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[18] https://sdgs.un.org/goals
[19] https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2021-05/210504-Recommendations-for-the-Transition-to-a-Green-Travel-and-Tourism-Economy.pdf?wiwmhlGgXT4zwXles_Q8ycdITGIQfaMt
[20] https://www.mbie.govt.nz/immigration-and-tourism/tourism/new-zealand-aotearoa-government-tourism-strategy
[21]
https://qticazure.blob.core.windows.net/crmblobcontainer/Building%20a%20Resilient%20Tourism%20Industry.pdf
[22] https://earthcheck.org/products-services/
[23] https://www.ecotourism.org.au/our-certification-programs/eco-certification-3/
[24] https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2021-05/210504-Recommendations-for-the-Transition-to-a-Green-Travel-and-Tourism-Economy.pdf?wiwmhlGgXT4zwXles_Q8ycdITGIQfaMt

- Consider making available existing crisis management tools for use by tourism operators including those developed by QTIC (*Industry Crisis Ready* Program[25]) over the last few years. There are digital/app resources that are well-tested, online kits, resources, and workshop modules that have been rolled out to various regions and council areas.
- Encouraging nature-based tourism and realising the mutual benefits of natural and cultural values as driving visitation to National Parks and other protected areas. Joint management of national parks, in conjunction with traditional owners presents an ideal opportunity, but this requires a workable model for tourism operators and traditional owners.

The need for sustainability and resilience in the tourism sector must also be reflected in business practices and be supported by commercial sustainability. QTIC recommends state-wide adoption of business accreditation frameworks. Accreditation assists with adherence to industry standards and codes of practice, compliance to regulations, development and implementation of business and marketing plans, and assessing and improving overall business quality and public confidence. Accreditation is increasingly becoming a necessity for businesses operating in the tourism industry. It is valued by operators, government, industry bodies and guests alike.

The *Quality Tourism Framework (QTF)*, owned and operated by the Australian Tourism Industry Council (ATIC), is a national business development program that is suitable for tourism businesses of all shapes and sizes. It provides businesses with the necessary tools and resources to ensure best practice management, customer confidence and the ongoing sustainability. The *Quality Tourism Accreditation* and *Star Ratings* system are also encompassed within the broader QTF structure.

Several thousand Australian tourism businesses

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[25] https://assets.entegy.com.au/documents/0f907953-cca4-4961-8368-582d428183ff.pdf

2.7 INNOVATION AND NEW PRODUCTS

Infrastructure development and access to affordable insurance cover are two of the primary concerns currently being expressed by tourism operators. As such, it would be prudent to review the infrastructure dynamics specifically for tourism and consider the necessity of reform to the insurance industry.

2.7.1 Infrastructure

Various other states are in the process of planning or implementing a series of catalytic infrastructure projects that are publicly funded or jointly funded with private investors. It is critical to assess the most impactful potential tourism developments that can drive further investment and visitor demand. A location-specific approach to such assessment is necessary and a clear understanding of what other supportive elements, such as visitor experiences, will be required for any project to succeed.

There are some instructive examples of government co-investments in tourism infrastructure, including in Queensland, that continue to demonstrate the catalytic benefits and returns from such investments. The returns manifest not just in increased tourism expenditure but also result in jobs growth, community revitalisation and additional investment and activity in other sectors of the economy. It is worth pointing to the success of a range of state government-funded tourism infrastructure projects across Queensland, such as the Capricorn Dinosaur Park, O'Reilly's Green Mountain Campground, Gold Coast Artificial Dive Attraction, Australian Age of Dinosaurs, and many more.

The current absence of new programs to support tourism infrastructure suggests a major gap in the plan for Queensland's tourism recovery. This extends to the aviation sector (including airlines and airports), which represents an *essential* infrastructure not just for tourism but for the entire community. An efficient, comprehensive, and competitive market for air services to both capital and regional destinations must be a high priority for both government and industry. A strategic and collaborative approach between service providers, the broader industry, regulators, and other government agencies must be encouraged and appropriately supported. This is to support both international and domestic market growth. While the $10 million, two-year commitment to aviation as part of the *Aviation Route Support Package* in the 2021-2022 State Budget is promising, this program should be extended in direct consultation with the tourism industry.

2.7.2 Insurance

The tourism industry, associated stakeholders and experts have reach a consistent conclusion that the insurance market is now failing in terms of the affordability and accessibility of insurance for the sector. No particular party is responsible for the current state of the market failure, which is complicated by global factors, state and federal regulation, natural disasters, and increased litigation. International markets, federal and state government policies and legislation, the insurance industry, and the business community as well as consumers, all have a part to play in change towards a more viable state-of-play for tourism-orientated insurance.

Some of the necessary steps can be taken locally, others are part of the global financial cycles, and it is only through collaboration with all parties that a long-term solution will be identified and delivered. The ongoing market failure requires a combined, nation-wide, consumer, industry, and government solution, overseeing the following:

- Reform to insurance for tourism operators should build on the recommendations from the ACCC report[26] and ASBFEO report[27].
- QTIC, in collaboration with ATIC, has developed an *Insurance Cover for the Tourism Industry* report[28] on how to best respond to the difficulties faced by tourism operators in securing appropriate insurance, including three key recommendations.

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[26] https://www.accc.gov.au/publications/northern-australia-insurance-inquiry-final-report
[27] https://www.asbfeo.gov.au/sites/default/files/Final Insurance Report_0.pdf
[28]
https://qticazure.blob.core.windows.net/crmblobcontainer/Insurance%20Cover%20for%20the%20Tourism%20Industry_ATIC%20FINAL.pdf

3. CLOSING REMARKS

QTIC welcomes the Tourism Industry Reference Panel's commitment to develop a strategic and long-term plan for the industry and the Queensland government's support for this process.

The COVID-19 crisis has created a dramatic backdrop to this process, with acute and significant challenges for operators. Balancing short-term measures with more strategic needs and opportunities is not easy. It is particularly difficult for the industry at this state to engage in longer-term issues when, for some, their very commercial survival is under threat.

Nevertheless, we strongly support the process and are fully committed to working with the panel to distill useful action items out the work. We strongly recommend building on any existing program or structure that lends itself to continued use. However, where necessary and opportune, 'brave' and innovative steps must be considered. COVID-19 is not just a health crisis, it is also a disruption. Past disruptions, albeit less global, have always yielded opportunities for those most adaptive and innovative. The Queensland tourism industry is ready to turn its capacities and its mindset to this approach, as is QTIC.

We expect this process will be somewhat iterative in nature and we look forward to a dialogue with the panel as the final document is prepared. We are ready to help with any arrangement for further discussions.

For any further questions or clarification, contact QTIC via email at policy@qtic.com.au or phone on (07) 3236 1445.