

Designing our Tourism Future

Brisbane Airport Response

Action Plan for Tourism Recovery in Queensland

June 2021



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A. INTRODUCTION

Why is the Action Plan for Tourism Recovery Important?

The development of the *Action Plan for Tourism Recovery* comes at a critical time. As the industry faces its most sustained and unpredictable rupture, in a time of broad structural economic upheaval, it is essential that a root and branch review is conducted, and plans developed to 'build back better'.

Whilst Australia's response to the COVID-19 pandemic has necessarily re-focussed the industry on domestic travel to buffer against the impact of closed international and state borders, the dependence of the Queensland visitor economy on international arrivals has never been clearer.

This dependence has been laid starkly bare, not just in terms of visitation, dispersal and expenditure, but also in terms of workforce and aviation capacity. Perhaps most surprising to many has been the realisation too of the inter-dependence of the international and domestic travel segments, and their centrality, in turn, to many other industries.

With the pathway to the re-opening of inbound international travel is still uncharted, though certainly inevitable, this Action Plan must position Queensland, and the tourism and travel industry within it specifically, to not just recover to pre-COVID levels, but to claim a greater share of international travel than it has ever previously enjoyed.

To do this, the Plan must address:

- A highly competitive international market environment
- Driving aviation capacity through sustainable network planning
- Driving consumer demand through brand building and tactical marketing
- Expanding industry capacity across broader range of travel segments – leisure, business, conventions and exhibitions
- Leveraging major events
- Innovation in product development to leverage unique experience propositions
- Diversity in product offering

Queensland has a powerful story to tell in its proven ability to contain the virus and keep its people safe that will serve its reputation well as the global visitor economy recovers. Queensland has shown that it can be a preferred and wonderful host for major domestic sporting events, and on an international stage the 2023 FIFA Women's World Cup and 2032 Olympics and Paralympics have the potential to have a metamorphic effect in terms of global name recognition.

As the state's primary aviation gateway, Brisbane Airport ("BNE") has a critical role to play. BNE is Australia's third busiest and the best domestically connected airport. It is the gateway to and from the world for the people of the city of Brisbane and the rest of Queensland. Further, for many other Australians it is the best option for their travels to points around the world. For travellers from north America, the Pacific, and east Asia, there is no better entry to Australia.

BNE is also more than just an airport. It is a mega-employment hub, a place to do business and a place to visit. It is a small city in itself - a 24/7 'Airport City' that is home to more than 425 businesses, with a working population of around 24,000 people and many millions of visitors a year.

Our contribution to the Queensland economy was just over \$4 billion in 2019, and that is forecast to double by 2040.

BNE also plays a critical role in industries as important to our economy as resources and mining, agriculture, aquaculture, communications, and defence. BNE's connectivity to the world makes all this possible.

WHAT MAKES BNE DIFFERENT?

Brisbane Airport is unique. No other Australian airport boast its extraordinary reach and limitless potential.

At 2,700 hectares, BNE's site is one of the largest landholdings in the city of Brisbane. The fact that this sits just minutes from the central business district, and at the crossroads of the major highways connecting the Gold and Sunshine Coasts, makes its value to economic growth of the State even more important.

The airport itself, with its wide-space parallel runway system, delivers the most growth capacity of any airport in the country. The runway capacity of BNE is roughly the same as major global hubs Singapore Changi and Hong Kong International.

Most importantly of all, BNE is a 24/7 aviation and business hub - the only 24-hour major international airport on Australia's east coast, making it critical to the nation's international export and trade growth prospects.

IMPORTANCE OF QUEENSLAND INTERNATIONAL AIRPORTS TO THE VISITOR ECONOMY

In total, 42 million passengers (34 million domestic and 8 million international) travelled through Queensland International Airports (BNE, OOL, CNS and MCY) across the state in 2019, increasing on average 2% each year since 2015. The aviation sector underpins businesses and communities in Queensland, transporting workers and tourists into and within the state.

Nationally, in 2019, aviation facilitated 23% of domestic overnight trips and 24% of trips by international visitors travelling around Australia.

In Queensland, the share of aviation facilitated domestic traffic was higher, with 29% of domestic overnight trips and 37% of international trips using air as the mode of transport to travel into or within Queensland.

Seven out of every 10 interstate overnight visitors travelled into Queensland by air, and six out of every 10 international visitors flew directly in Queensland.

In 2019, passengers to the Queensland International Airports accounted for 22.2% of aviation passengers in Australia (23.4% of domestic passengers and 18.9% of international passengers).

The Queensland International Airports play an important role in facilitating visitors to the state. These visitors generate tourism revenue (in visitor expenditure), generating economic benefits to the state's economy.

The Queensland International Airports facilitated 9.5 million visitors and 80.3 million visitor nights in 2019, increasing on average 6.0% and 2.9% each year respectively between 2015 and 2019.

These visitors generated around \$10.1 billion in visitor spend of which around 48% was from international visitors, 46% from domestic interstate and 7% from intrastate visitors. Facilitated visitor spending increased 7.8% on average each year between 2015-2019.

In 2019, the tourism activity facilitated by the Queensland International Airports contributed \$7.3 billion in value added to the Queensland economy, reflecting average annual growth of 7.9% since 2015.

During the same period, the tourism activity facilitated by the Queensland International Airports supported 54,300 full time equivalent (FTE) jobs, reflecting average annual growth of 5.5% since 2015.

PRE COVID-NETWORK – QUEENSLAND’S INTERNATIONAL SUCCESS STORY

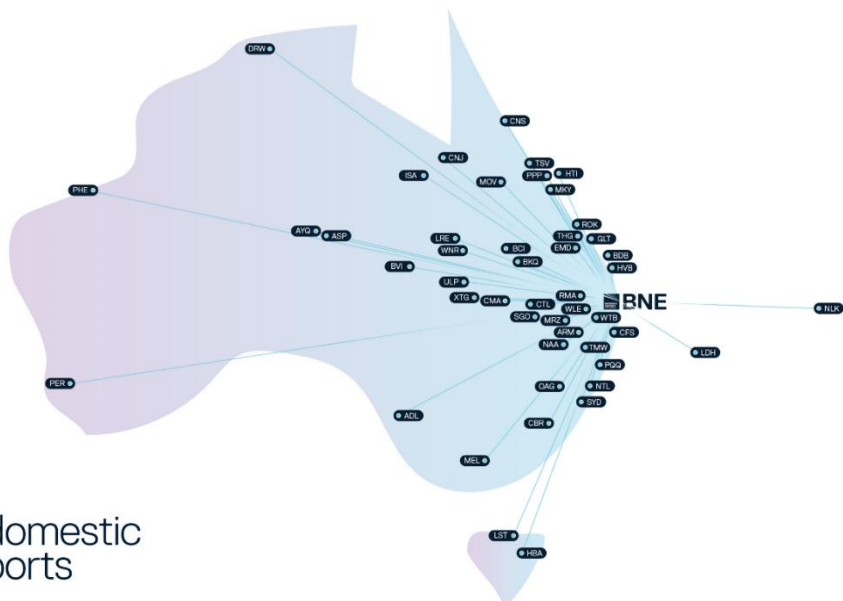
Prior to the global pandemic, BNE was Queensland’s undisputed gateway to the world, with regular passenger services to 34 international ports, and the best-connected airport across Australia with 51 domestic destinations, including the most interconnected intrastate aviation network in Australia.

More than 20 Queensland destinations rely exclusively upon Brisbane as their major connection hub, and visitor dispersal throughout the state relies on the connectivity that Brisbane Airport offers. Brisbane Airport has served as the entry point to Australia for most of the Pacific region, operated well established international routes across the Middle East and Europe, throughout Asia, and more recently, a burgeoning network into the USA. The announcement of services to San Francisco and Chicago in early 2019, utilising Qantas’ Brisbane Dreamliner base, was evidence of the potential for BNE to assume true gateway status between the US and Australia.



34 international ports

Brisbane’s 34 international ports served as the major gateway for the majority of Queensland’s international visitors across leisure, VFR, business, education, and cargo and freight operations.



Brisbane is unique in Australia, serving as the most connected of any domestic Australian port throughout the nation. This has remained consistent throughout the COVID-19 pandemic.

BNE'S ONGOING ROLE AS THE GATEWAY TO QUEENSLAND AND DRIVER OF THE VISITOR ECONOMY

Brisbane Airport remains, and will continue to remain in the future, the gateway to and from Queensland. With 70% of overnight visitors from interstate accessing the state by air, BNE is the front door to Queensland. Critically and yet often not fully understood, however, is that BNE remains the most important connection for all of Queensland's regional airports in developing and growing their access not only the international visitor economy, but also to the domestic interstate visitor economy.

BNE currently supports over 500 weekly services throughout Queensland to 21 interstate destinations with 6 airlines including Qantas, Virgin Australia, Jetstar, Alliance Airlines, Regional Express and Link Airways. Destinations across Queensland serviced via BNE include Barcaldine, Biloela, Blackall, Bundaberg, Cairns, Cloncurry, Emerald, Gladstone, Hamilton Island, Hervey Bay, Longreach, Mackay, Moranbah, Mount Isa, Proserpine, Rockhampton, Roma, Sunshine Coast, Townsville, and Weipa. This extensive network is critical in feeding international to domestic, and domestic to international, connectivity that fundamentally underpins airline performance, and allows Queensland to compete with Sydney and Melbourne on a global scale.

Put simply, without a successful and thriving BNE driving the performance of the state, there is a naturally constrained ability to grow the domestic and international visitor economy.

It is important to note that air services must be supported by a mix of segments (not simply leisure traffic, but a critical mass of VFR, business, FIFO, education, as well as freight and cargo volumes) to maintain long-term operational and commercial sustainability. The capacity of smaller, non-capital city ports to deliver this sustainability is questionable.

Future support for the aviation sector in Queensland must therefore be based on the highest return on investment and deliberately focused on air services that have the proven fundamental economics in place to ensure their longevity.

COVID IMPACT ON QUEENSLAND'S MAJOR GATEWAY

The response to the global pandemic including government mandated quarantine and border closures will continue to have an enduring impact on the aviation industry, including airports, and the Queensland visitor economy. International passenger movements - the most important and valuable segment of the overall visitor economy underpinning the majority of OVE and visitor dispersal, and a critical component of Brisbane Airport's operations - have remained negligible for 12 months. Whilst Brisbane's domestic capacity has been supported by a strong network of intrastate air services, the interstate visitor market out of Sydney and Melbourne remains the bulk of the source of domestic visitation. Accordingly, whilst a resilient and free flowing interstate market is critical to maintain, the ability to progressively open to Queensland's international markets is the most essential long-term need for the visitor economy recovery.



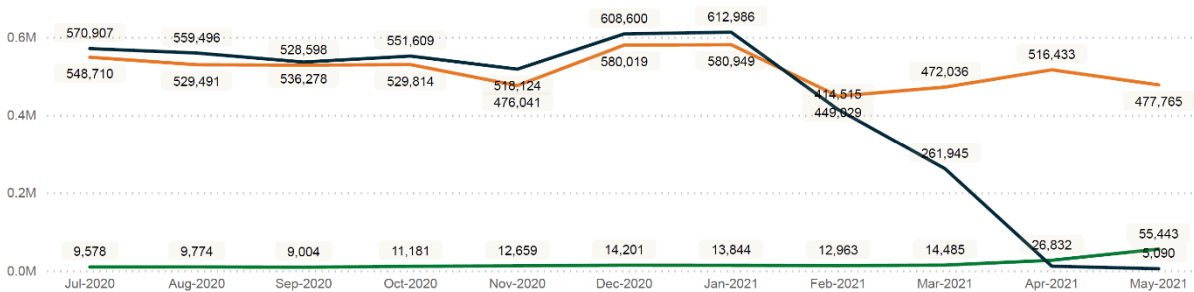
INTERNATIONAL TRAFFIC SUMMARY - FYTD

Pax volumes FYTD and variance to last month, prior year, and preCOVID

May-2021

Total International Pax

● 2021 FYTD ● 2020 FYTD ● 2019 FYTD



As of May 2021, over 12 months into the global pandemic, international passenger numbers through Brisbane Airport remain at record lows, operating at less than 12% of pre Covid levels even with the uncapped Trans-Tasman bubble having opened on April 19th, 2021.



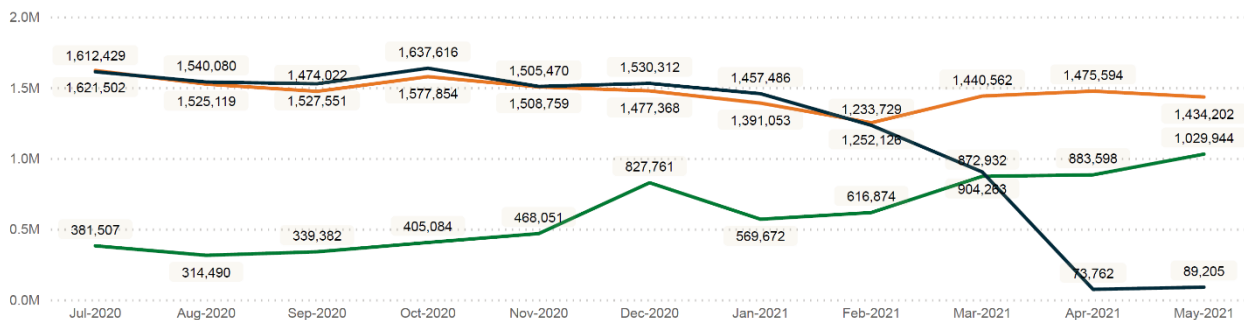
DOMESTIC TRAFFIC SUMMARY - FYTD

Pax volumes FYTD and variance to last month, prior year, and preCOVID

May-2021

Total Domestic Pax

● 2021 FYTD ● 2020 FYTD ● 2019 FYTD



Whilst many of Queensland's regions have begun recovery and are experiencing strong seasonal visitation, Brisbane's domestic passenger data shows that overall passenger numbers remain 20% down on pre Covid levels, even when all domestic borders are open and remain unaffected after several weeks. May 2021 has been the best performing month for domestic recovery to date, but data shows a significant proportion of the domestic market is yet to be returned.

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

Key Recommendations

	Identified Need	Partners	Timing
Develop a Capital City Visitor Economy Strategy to grow visitation to Brisbane and maximise the benefits of that growth for the broader Queensland Visitor Economy.	<p>The prospect of hosting the 2032 Olympics and Paralympics underpins the need for a revitalised Visitor Economy Strategy for Queensland's Capital City to effectively plan and position the city to attract increased global visitation.</p> <p>Accelerated recovery of Queensland's visitor economy performance is only possible with a future focused Capital City cross-Government Plan for post Covid world</p>	<ul style="list-style-type: none"> Department of Premier and Cabinet Department of Tourism, Innovation and Sport Department of State Development Tourism Events Queensland Brisbane City Council Brisbane Economic Development Agency Brisbane Airport Corporation 	By mid-2022
Review options for enhanced funding models for the Brisbane Destination Marketing Strategy, including greater alignment and collaboration by the State and the City	Brisbane's profile as a global city requires more aggressive international promotion and prioritisation within the context of Queensland's positioning strategy, and the current limited resource pool remains a barrier to future growth and market share gains. Recent performance data shows a strong performing capital city leads to the largest gains in visitor economy market share against other Australian states. A review of options to unlock destination management funding is needed for the future of Brisbane.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Queensland Tourism Industry Council Brisbane City Council Brisbane Economic Development Agency Tourism Australia 	By end 2021
Increase focus on Business Events to drive corporate travel back into the city	Aviation routes rely heavily on business class travel for profitability, particularly long-haul international routes to connecting hubs such as Singapore. Brisbane's ability to host medium to large size business events to draw international business travel to the city will be an important consideration to rebuilding international connectivity.	<ul style="list-style-type: none"> Brisbane City Council Brisbane Economic Development Agency 	Ongoing
Wider recognition of the critical role VFR, business travel, cargo, freight imports and exports and education tourism play in aviation development, in support of leisure tourism growth opportunities	In a post-Covid world, leisure tourism may not be relied upon to underpin international airline route development or capacity expansion. Lesser recognised segments may become critical enablers of capacity that will enable the recovery of leisure tourism. These other segments require recognition in future program management to provide the full picture of aviation route sustainability.	<ul style="list-style-type: none"> Department of Premier and Cabinet Department of Tourism, Innovation and Sport Department of State Development Tourism Events Queensland Brisbane City Council Brisbane Economic Development Agency Brisbane Airport Corporation 	Ongoing

Over the last 12 months, Queensland has gained more people from net interstate migration than any other state or territory, and this growth is set to continue, with South-East Queensland's (SEQ) population forecast to increase by 41.1 per cent by 2041.

Prior to COVID, Queensland's tourism industry was a \$28 billion industry for the state, with more than 20 per cent of domestic traffic coming from international visitors.

The industry has had to refocus over the last year and this period of policy reset should be used productively.

Whilst we have emphasised the overall importance of international visitation, stabilising and growing the domestic market must be the immediate priority, and in particular emphasising sectors that bring both leisure and business travel.

BAC supports the need for a Capital City Strategy for Brisbane to provide a clear pathway for tourism development and growth and allow tailored actions for the region. This strategy would be reflective of Brisbane's role as the gateway to the state for both domestic and international markets and focuses on institutional strengthening to ensure we are capable of and have permission to get on with it.

A reconsideration of funding options for the visitor economy in Brisbane is seen as important and necessary step to ensuring the city realises its aspirations to be recognised on a global stage. In contrast to Sydney and Melbourne, Brisbane has endured a long-standing challenge to elevate itself across key international markets and raise the awareness, consideration, and preference for the city.

But the brand challenge for Brisbane also exists domestically. Queensland is largely identified as a nature-based leisure destination for Australians, meaning the very real attractions of the city for leisure travellers have rarely been properly marketed. The exceptions to this have been major cultural events, including blockbuster art exhibitions, and these should continue to be emphasised and provided with sufficient backing.

Furthermore, an aggressive approach is required to attract large scale business events, conventions and exhibitions in a world emerging from the restrictions of the pandemic. These large-scale international business events bring both corporate and leisure visitors to city, raise the reputation of the city for business travel purposes, and significantly boost visitor nights.

There is a need for greater recognition of the aviation connectivity link between leisure tourism source markets and other key drivers of the Queensland's economy such as international education, cargo, international freight, agriculture, and property development. A wider set of considerations by key stakeholders in a world emerging from the restrictions of covid, particularly in relation to the value and significant placed on aviation opportunities in driving the connectivity of Queensland to global audiences is needed.

As mentioned earlier, the primacy of international visitation as a driver of economic impact means there is an imminent and obvious need to re-establish and grow key international destination points from Brisbane as it will, in effect, bring broader benefits to the economy, including the purposeful re-engagement with both global and international airline partners that have serviced Queensland for many years.

In support of this, there is still work to be done to overcome Brisbane's inadequate international profile and elevate the city to the rightful level you would expect of Queensland's capital city and international gateway.

C. HOW DO YOU WANT QUEENSLAND TOURISM TO BE DEFINED IN THE 2020S?

Key Recommendations

	Identified Need	Partners	Timing
Further investment and elevation of Brand Brisbane within Queensland's Destination Positioning Strategy to grow Queensland's Visitor Economy market share	Queensland's international appeal and competitive advantage will be enhanced with an internationally recognised and globally promoted capital city, which also supports visitor dispersal to regional Queensland. Brand Brisbane requires a greater focus within the prioritisation of Queensland's marketing efforts.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland Brisbane City Council Brisbane Economic Development Agency Tourism Australia 	Ongoing
Improve connectivity between BNE and the CBD, as well as the regions, through inter and cross modal planning	Improved connectivity between BNE the city, and Queensland's regions to create more seamless visitor flows from domestic to regional and international to domestic destinations to improve appeal of the destination for global audiences	<ul style="list-style-type: none"> Department of State Development Department of Transport and Main Roads Department of Infrastructure and Planning Brisbane Airport Corporation 	Ongoing

Queensland is in a unique position to enhance its position as a preferred global tourism destination.

Our response to COVID-19 makes our state the envy of the world and allows a unique selling point of what our state has to offer.

A Queensland where the icons of Gold Coast and the Great Barrier Reef, as well as the opportunity of the Olympic and Paralympic Games, benefit the whole of the state as well as espousing the regional links between destinations.

The opportunity is to position Queensland as the most welcoming state, accessible to all visitors. It is essential that there is a model where public private cooperation is encouraged whereby the state's attractions feel supported and championed by state and regional tourism's organisation for raising their profile around the world.

This is the time to truly define Brand Brisbane and Brand Queensland.

Over the next decade we need to enhance our connectivity from our key ports. Brisbane Airport is already the primary gateway to Queensland and connected to the most domestic locations.

South-East Queensland now needs to build on this and ensure seamless connectivity to from Brisbane to the Sunshine and Gold Coast.

D. HOW DO WE MAKE THE BEST USE OF OUR TOURISM ASSETS? IN YOUR OWN WORDS, WHAT IS MISSING?

Key Recommendations

	Identified Need	Partners	Timing
BAC supports the development of appropriate new tourism infrastructure and visitor focused assets in the city of Brisbane that are consistent with Brisbane EDA's 2031 Visitor Economy Plan	Brisbane city is evolving, with new precincts, inner city venues, and improved experiences along the Brisbane River enhancing the appeal of the city and directly leading to increased visitation from interstate and international markets. Further development of major tourism attractions connected to the river to support developments like Queen's Wharf and Howard Smith Wharves are seen as critical drivers of future demand.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Department of State Development Tourism Events Queensland Brisbane City Council Brisbane Economic Development Agency Brisbane Airport Corporation 	Ongoing
Explore options for future Tourism Infrastructure Development on Airport	The BNE Auto Mall serves as an example of innovative developments that complement the airport's traditional role as an airline related development hub. The BNE Auto Mall itself will be an Australian first and provides an indication of the types of land use that could be unlocked that are attractive to new visitor segments and potential new visitor markets. Future assessment of BNE tourism infrastructure possibilities requires ongoing Government engagement and support.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Department of State Development Tourism Events Queensland Brisbane City Council Brisbane Economic Development Agency Brisbane Airport Corporation 	Ongoing

Fundamentally, we need to give people new reasons to come to Queensland. Raising the profile of the capital city to be aligned with the worldwide awareness of the Gold Coast, Cairns and Great Barrier Reef in different markets will help ensure a new segment of visitor is attracted upon the existing layers of segments that already display a high level of intention and interest to come to Queensland. Hollywood has discovered Queensland to film movies and television, and this should be leveraged in the future to create tourism experiences.

Enabling Brisbane to grow destination attractions and experiences as a destination in its own right, as well as a gateway and transit point to arrive, experience stay and spend in Queensland, is critical to lifting the overall performance of the Queensland visitor economy. The BNE Auto Mall and experience centre has the potential to be a unique global attraction.

Elevating the inherent strengths and assets of Brisbane, including river experiences, inner city experiences, indigenous culture integration, along with the inherent natural environment of Brisbane's bay and surrounds will serve to provide Queensland with a strong capital city experience to complement the existing assets and world-famous icons across the state.

E. WHAT PRACTICAL MEASURES CAN AND SHOULD BE TAKEN TO ENSURE TOURISM HELPS REGENERATE NATURAL ENVIRONMENTS, AND BRING GREATER AWARENESS AS WELL AS ECONOMIC BENEFIT?

Key Recommendations

	Identified Need	Partners	Timing
Enhance narrative on sustainability of Queensland's world heritage assets	Confidence to be reinforced in global tourism markets of the sustainability of Queensland's World Heritage Areas	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland RTOs 	Ongoing
Elevate prominence of Queensland's First Nations people in marketing the state	Queensland's First Nations are the oldest continuing culture in the world. Their stories and connection to land need to be elevated and promoted on a world stage.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland RTOs 	Ongoing

Queensland's natural environments, from the lush rainforests to the Great Barrier Reef are the envy around the world.

Queensland is home to diverse, pristine environments including five World Heritage sites. We have a duty of care to preserve and protect our environment so it continues to underpin our lifestyle and economy. Once international borders are lifted, and lockdowns come to an end, Queensland's natural beauty will be a major attraction for exploration.

Recent reports on the threats to the Great Barrier Reef have the potential to erode confidence. Providing reassurance on the sustainability of the reef is key.

Institutional coordination is required with the State Government working with the Councils and RTOs to create well-designed and well-maintained access to natural attractions.

Tourism experiences that showcase our indigenous heritage should be a priority and have a more prominent role in global marketing. The demand for culturally based tourism will continue to grow and our First Nations people connection to land and the stories handed down through generations provide a unique learning experience unrivalled anywhere in the world.

F. DO YOU SEE ANY ADDITIONAL TRENDS OR EMERGING CHANGES THAT WE MUST ALSO CONSIDER?

Key Considerations

	Identified Trend
Bilateral air service agreements between countries requiring renegotiation including greater complexity for two way onwards connections; more involvement from Government, Health Authorities, and airports in the planning process for international border openings; increase pressures and requirements for local planning and regulatory guidelines to meet each other's reciprocal needs	Current regulations surrounding international travel bubbles suggest that opening international borders will require far greater involvement from a variety of authorities and a more complex set of regulations to comply to in order for bilateral agreements to be reached. Evidence already shows that multiple layers of Government, and stakeholders at the airport-to-airport level will require involvement for bubbles to open. This places greater pressure on all stakeholders to resource and coordinate sufficient forward planning to accommodate the added requirements that come with border reopening can be accommodated. Governments will need to work in close partnership with airports to ensure international travel bubbles are enabled on an airport-to-airport planning framework level.
Escalation of competition forming aggressive partnerships to support route restart and route development, offering generous direct aviation recovery support programs, airline incentives and destination marketing support	Evidence of early movement of other countries, states and regions mobilising new aviation and tourism policies to position themselves for a post Covid world to attract airline partners as a matter of priority
Traditional global connecting hubs may be less desirable in a post Covid world, providing greater challenges for re-establishing Queensland's previous international aviation network	Potential for Queensland's historic key international airline legacy carriers to experience headwinds in recovery as consumer preference and regulatory restrictions lead to more point-to-point travel on long haul international routes; erosion of the viability of some traditional long-haul markets based on the inability to funnel connecting traffic from other onward in inward destinations (i.e., via Singapore or Dubai)
International travel bubbles not translating to a full passenger recovery profile or stimulating demand in themselves	In contrast to expectation, the actual and perceived risks of international travel for consumers are having a striking effect on short term international bubble performance. Passenger recovery trajectories in those zones where bubbles have occurred have been modest, and the bubbles themselves have proven to be fragile with short term closures and changing policies leading to a future where travel bubble creation does not necessarily translate to visitor recovery at the levels experience pre Covid
Rise of the environmentally conscious traveller and the reality of the carbon cost for flying	Air travel and its air emissions is a growing issue of global consciousness. Carbon footprint of flying may impact holiday choice for future visitors. BAC has committed to net zero emissions by 2050, and will be partnering with industry to develop strategies to progress toward this goal.

As the Queensland economy recovers in a post-COVID environment it is important to be mindful of a range of trends that may influence policy makers.

Central to the aviation sector will be a proactive, rather than a reactive, approach to the bilateral and regulatory environment, that will determine the potential flows of passengers between states and other countries. Governments and health authorities will need to work closely with airline partners and airports to implement clearly defined and clearly communicated practices that will underpin how international travel and arrivals are managed in the state. These practices will require collaboration with a multitude of stakeholders and the governance of these practices will directly determine the state's aviation capacity.

Within the global and local context, Australia is not immune to climate change and global warming. There is a risk of growing concerns regarding the carbon footprint of the aviation industry. The contribution of aviation to emissions is undeniable, and Queensland will need to respond to that through the transparent communication of sustainability measures and accurate information regarding the contributions of aviation to global emissions. Brisbane Airport is committed to this, and we have adopted a commitment of net zero emissions by 2050.

G. WHAT ARE YOUR IDEAS FOR THE FUTURE OF QUEENSLAND'S TOURISM INDUSTRY?

Key Recommendations

	Identified Need	Partners	Timing
Establish new Aviation Capacity Expansion Program (ACE) to replace the Aviation Attraction Investment Fund (AAIF)	Airports recommend the consolidation of previous aviation attraction programs into a single program of \$100 million over four years commencing July 2022 to be renamed the Aviation Capacity Expansion program (ACE), for the purpose of both domestic and international airline route retention, development, and expansion.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland Brisbane City Council Brisbane Economic Development Agency 	By end of FY22
Maximise recovery of Brisbane's International aviation network to drive the international visitor economy to Queensland	Brisbane has served as Queensland's primary gateway to the world with 34 international ports prior to the pandemic. Recovery of the international visitor economy to Queensland required priority long term support for BNE to re-establish the international network for the state.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland Brisbane Airport Corporation 	By end of FY22
Queensland Government to support an 'early mover' strategy for aviation recovery	Fierce competition for airline routes, already experienced between NSW, VIC and Queensland pre pandemic, is anticipated to intensify as international borders re-open. Governments that are quick to partner with airports and state tourism organisations to support previously loyal airlines to destinations will be the best placed to capitalise upon the international visitor economy recovery.	<ul style="list-style-type: none"> Department of Tourism, Sport and Innovation 	As borders open
Invest in enhanced funding for Tourism and Events Queensland's global destination marketing activity	All airports agree that existing or enhanced baseline funding for Tourism and Events Queensland should be secured to provide ongoing international marketing activity to support airlines operating into Queensland.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland 	Ongoing
TEQ and TIQ international office network reactivated and resources expanded to drive recovery of international source markets	Competition amongst Australian states for international source market visitation across leisure, education and business segments is anticipated to increase in a post Covid world. Increased resources in overseas offices representing the interests of Queensland and fighting for market share in recovery seen as an important priority for recovery.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland 	As borders open
		<ul style="list-style-type: none"> 	

The importance of aviation access - as a facilitator and enabler of tourism, visitor expenditure, investment, trade, education, and employment outcomes - is well documented within tourism and aviation research. There are a number of existing Government and industry documents that highlight the value of improved aviation access in stimulating economic growth, illustrating the importance of an ongoing review of current Government aviation attraction policies, support structures and funding programs which aim to attract and sustain aviation services into key destinations.

Aviation is directly related to increased tourism and visitor expenditure. As the world begins to re-open from a COVID, Queensland will need to be an early mover to re-establish itself as an international travel destination of choice.

Re-establishing direct flights to international destinations that were in place pre Covid and establishing new connections where possible must be a high priority for any visitor economy recovery plan. Airline attraction will be significantly more competitive as the result of COVID-19 impacts and staged. The key is to learn from the range of aviation attraction programs which have been delivered and deliver a model that achieves desired outcomes and learns from previous programs. Brisbane Airport must be supported to be an early mover in there-establishment of international airlines routes and supported by a 4-year funding program available to all of Queensland's International Airports beginning in July 2022. Funding support for airlines must be front weighted in the early recovery years and provide for carriers that have both previously served Queensland, as well as new entrants.

Funding support will be critical in supporting these services, not only in the development of business cases, but also in the implementation of demand generation activity across tourism, education tourism, business travel, freight and cargo import and exports, is the effective operation of Queensland's international network of professional representatives across both Trade and Investment Queensland and Tourism and Events Queensland. The need for improved resourcing and effective representation in key international markets where international borders have reopened, at the appropriate time, is a necessary step to ensuring the sustainability and effective operations of Queensland's international airline network in recovery.

H. WHAT DO YOU SEE AS THE MAIN OBSTACLES TO PROGRESS?

Key Obstacles to Visitor Economy Recovery

	Identified Need	Partners	Timing
Absence of a staged and coordinated international border re-opening plan with clearly identified guidelines for key stakeholders in the passenger journey across different bilateral agreement scenarios	At the appropriate time, in-advance communicated plans that allow the industry, in particular airports and airlines, to prepare for the facilitation of international travel bubbles when and how they occur	<ul style="list-style-type: none"> Department of Premier and Cabinet Department of Health Department of Immigration and Foreign Affairs 	In advance of borders opening
Inactive or inflexible Government engagement and support for critical airline partners	Government must work with airports and airlines in order to ensure adequate recovery strategies are in place and support is provided for airlines that commit to rebuilding services to the state of Queensland.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland 	Ongoing
Lack of commitment to long term policy program for aviation in Queensland	Case by case specific funding programs, or single year programs do not allow the forward planning required to rebuild airline services over a period of time. A forward leaning 4-year funding program will be critical to allow negotiations with airlines for long term incremental growth.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland 	As borders open
Lack of awareness of competitor State strategies with airline and aviation partners, and inability to respond where necessary	Government must be alert to aggressive programs in place and new programs that may be announced by other states that may affect Queensland's ability to rebuild and rebound in the visitor economy recovery phase once international borders open. State Governments willing to form partnerships with airports and airlines and respond to competitor activity will be best placed to grow market share in the future.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland Brisbane City Council Brisbane Economic Development Agency 	Ongoing
Missing the opportunity to enhance Brand Brisbane to Grow Queensland's Share of Visitors	The performance of Brisbane in recent years began to underpin market share gains for Queensland against other states in Australia, showing that a strong capital city leads to better overall performance of the state's visitor economy. Prioritisation of Brand Brisbane and consideration of a standalone strategy for the city is a key to stimulating future performance of the state.	<ul style="list-style-type: none"> Department of Tourism, Innovation and Sport Tourism Events Queensland Brisbane City Council Brisbane Economic Development Agency 	By end FY22

The Action Plan for Tourism Recovery must be an important blueprint to reset the State Government policy priorities. For a sector highly reliant on overseas visitation, agreed arrangements between state and federal government around how international borders are to be opened and managed is critical.

Furthermore, a strong focus is required on public and private coordination between tourism and travel infrastructure and attractions. In other words, the private sector requires the confidence it can create and establish product and the State's tourism bodies are enabled to engage and promote in key markets.

For too long Queensland as a state has suffered from overt parochialism and a dispersed focus when targeting international markets. Greater leadership is required to focus strategic marketing investment on those destinations and experiences that underpin the overall performance of the Queensland visitor economy and that have a history of performance in attracting international visitor markets.

To achieve this there needs to be clearly defined and optimised institutional arrangements, funding pathways and policy settings that provide clarity and can stimulate tourism recovery.

Aviation capacity support policies are critical in their ability to cut through the noise generated by industry and focus strategy and investment where returns are the greatest for the Queensland visitor economy.

Whilst historically it was only low cost carriers that sought significant reductions in airport charges and vast Government support for destination marketing promotions, this has become the standard approach taken by all carriers, resulting in a highly competitive environment where airlines, airports, Destination Marketing Organisations and Governments from across the world all compete to offer favourable agreements to attract growth, ensure sustainability of new routes, and reduce the risk of failure.

This trend of competition for airline services is only likely to increase in a post Covid world as economies and Government all fight for the return of the visitor economy dollar. Queensland must be well prepared and well placed to meet the task ahead.

The closure of international borders has also highlighted the weaknesses of a skilled workforce for the sector. Greater encouragement is required to ensure the sector is considered an industry of choice for graduates. Queensland should be aspiring to have the most qualified, competent and agile tourism workforce that is recognised globally.

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

Recommendation	Comment
Funding for existing TEQ International Offices is sustained into the Future	TEQ's international offices are extremely important in sourcing local information and intelligence as well as relationship facilitation for industry. These essential services must be funded into the future.
Undertake an audit of data collection and sources to assist better decision-making and planning of industry	Review data collection and sources and consider better ways to link tourism expenditure reporting directly to aviation performance

The competition for the tourism dollar in a post-COVID environment will be immense.

Queensland needs to be an early mover in re-establishing connections to international destinations and developing new ones. The Queensland Government needs to develop an aviation attraction model with industry support that achieves desired outcomes and learns from previous programs.

Essential to this approach is that Queensland's overseas tourism bodies play an important role in providing local information and intelligence as well as relationship facilitation for industry. BAC strongly recommends these essential services are sustained and funded into the future.

Moving forward, good quality data will be essential for decision-making. BAC supports a recommendation for a review for better data collection and sources. Consideration should be given to linking tourism expenditure reporting directly to aviation performance to demonstrate the critical relationship that aviation has in driving the overall visitor economy.

J. SUMMARY AND RECOMMENDATIONS

A summary of Brisbane Airport Corporation's key recommendations and comments to the Action Plan for Tourism Recovery are:

Consultation Questions	Comments / Recommendations
What could be done at a local level to increase the benefits of tourism?	<ul style="list-style-type: none"> BAC Supports the Development of a Capital City Visitor Economy Focused Strategy to Enhance Brisbane's role in growing the overall Queensland Visitor Economy Review Options for Enhanced Funding Models for Brisbane Destination Marketing Strategy, including Greater Alignment and Collaboration by the State and the City Recovery of Business Events to drive Corporate Travel back into the city Wider recognition of the critical role VFR, business travel, cargo and freight imports and exports and education tourism play in aviation development, in support of leisure tourism growth opportunities
How do you want Queensland tourism defined in the 2020s?	<ul style="list-style-type: none"> Further Investment and Profiling of Brand Brisbane within Queensland Destination Positioning Strategy to Grow Queensland's Visitor Economy Market Share against other states Improve connectivity between BNE and the CBD, as well as the regions, through inter and cross modal planning
How do we make the best use of our tourism assets?	<ul style="list-style-type: none"> BAC supports the development of appropriate new tourism infrastructure and visitor focused assets in the city of Brisbane that are consistent with BEDA's 2031 Visitor Economy Plan Explore Options for Future Tourism Infrastructure Development on Airport
What practical measures can and should be taken to ensure tourism helps regenerate natural environments, and bring greater awareness as well as economic benefits?	<ul style="list-style-type: none"> Enhance narrative on sustainability of Queensland's world heritage assets Elevate prominence of Queensland's First Nations people in marketing the state
Do you see any additional trends or emerging change that we must also consider?	<ul style="list-style-type: none"> Escalation of competitors forming aggressive partnerships to support route restart and route development, offering generous aviation recovery support programs, airline incentives and destination marketing support Traditional global connecting hubs may be less desirable in a post Covid world, providing greater challenges for re-establishing Queensland's previous international aviation network Bilateral air service agreements between countries requiring renegotiation including greater complexity for two-way onwards connections; more involvement from Government, Health Authorities, and airports in the planning process for international border openings; increase pressures and requirements for local planning and regulatory guidelines to meet each other's reciprocal needs International travel bubbles not translating to a full passenger recovery profile or stimulating demand in themselves
What are your ideas for the future of Queensland's tourism industry?	<ul style="list-style-type: none"> Invest in enhanced funding for Tourism and Events Queensland's global destination marketing activity

	<ul style="list-style-type: none"> • TEQ and TIQ international office network reactivated and resources expanded to drive recovery of international source markets • Maximise recovery of Brisbane's international aviation network to drive recovery of the international visitor economy to Queensland in the 2020s • Establish new Aviation Capacity Expansion Program (ACE) to replace the Aviation Attraction Investment Fund (AAIF) • Queensland Government to support an early mover strategy for Aviation Recovery
<p>What do you see as the obstacles to progress?</p>	<ul style="list-style-type: none"> • Absence of a staged and coordinated international border re-opening plan with clearly identified guidelines for key stakeholders in the passenger journey across different bilateral agreement scenarios • Inactive or inflexible Government engagement and support for critical airline partners • Lack of commitment to long term policy program for aviation in Queensland • Lack of awareness of competitor State strategies with airline and aviation partners, and inability to respond where necessary • Missing the opportunity to enhance Brand Brisbane to Grow Queensland's Share of Visitors
<p>What should Queensland be doing to re-set, transform and embrace the opportunities a post COVID-19 world presents?</p>	<ul style="list-style-type: none"> • Funding for existing TEQ International Offices is sustained into the future • Undertake an audit of data collection and sources to assist better decision-making and planning of industry