

DESTINATION
GOLDCOAST.

An aerial photograph of the Gold Coast, Australia, showing a wide sandy beach curving along the coast. The ocean is a deep blue with white surf washing onto the shore. In the background, a dense urban skyline is visible under a clear blue sky. The skyline includes several prominent skyscrapers, most notably the Q1 and Q2 towers, which are tall, slender buildings with unique architectural features. Other buildings of varying heights and styles are scattered along the coast. The overall scene is bright and clear, suggesting a sunny day.

**TOURISM
RECOVERY
ACTION PLAN**

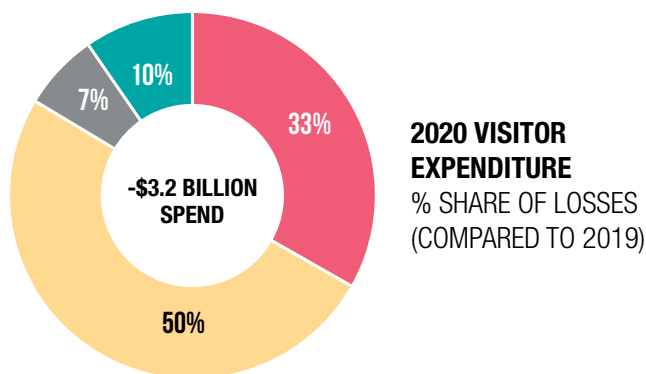
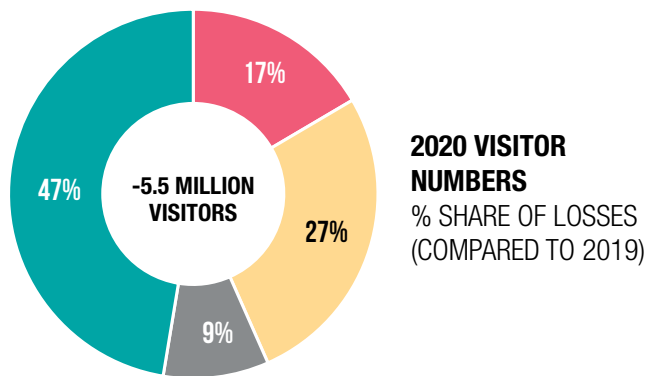
JULY 2021

DESTINATION GOLD COAST RESPONSE: QUEENSLAND'S ACTION PLAN FOR TOURISM RECOVERY

On behalf of the Gold Coast's tourism industry, Destination Gold Coast (DGC) is focused on providing practical advice and thoroughly considered responses to the Tourism Industry Reference Panel to support the recovery and growth of Queensland's tourism future. Based on capacity to deliver, the Gold Coast's visitor economy will play a critical role in supporting the Queensland Government's Economic Recovery Plan to drive sustainable economic growth and investment, create jobs and infrastructure leading our state recovery, resilience, and future prosperity.

COVID-19 has had a devastating effect on our regional tourism sector and has altered Queensland's visitor economy. In 2019 the Gold Coast tourism industry contributed **\$5.9 billion** into the local economy welcoming **14.2 million guests** annually and was responsible for more than **44,000 jobs** across more than **4,600 tourism businesses**. In 2020, COVID-19's impact resulted in the loss of **5.5 million visitors** and **\$3 billion** in expenditure. The Gold Coast accounted for 19 percent of Queensland's domestic overnight spend in 2019 and 24 percent of (spend) losses in 2020 making the region disproportionately impacted by the impacts of domestic border closures.

IMPACT OF COVID-19 ON GOLD COAST TOURISM



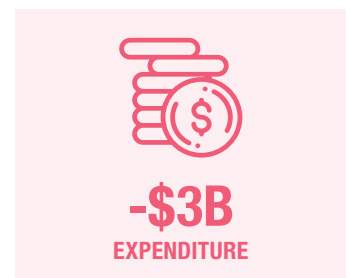
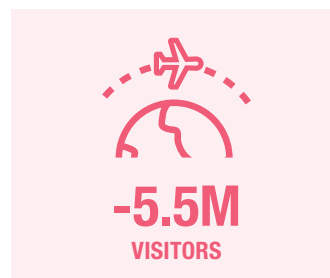
■ International ■ Domestic Overnight - Interstate
■ Domestic Overnight - Intrastate ■ Daytrip

Source: Tourism Research Australia, National Visitor Survey and International Visitor Survey, December 2020.

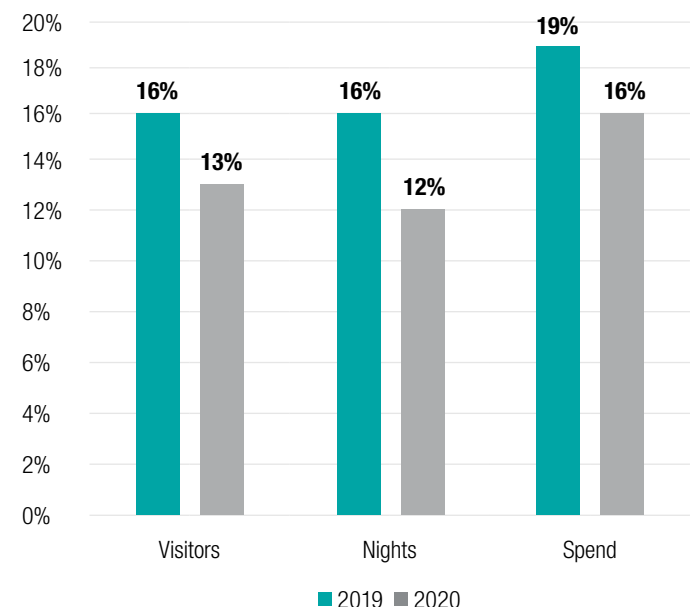
IN 2019 THE GOLD COAST TOURISM INDUSTRY CONTRIBUTED TO:




COVID-19'S IMPACTED 2020 RESULTS WITH THE LOSS OF:



GOLD COAST SHARE OF QLD DOMESTIC OVERNIGHT





 JW MARRIOTT GOLD COAST RESORT & SPA

THE VISITOR ECONOMY & COLLABORATION

Based on the value of the regional and state's visitor economy, and the current focus on recovery and growth, there is an enhanced need for collaboration between key agencies, all levels of government and industry. Through a coordinated approach, connecting and optimising the strengths and roles of our destinations and key stakeholders will position Queensland favourably in what will be an increasingly competitive landscape. Destination management and marketing organisations must align wherever possible, adding value to government-led trade and investment initiatives.

Two overarching priority areas are the distinct areas of destination management and destination marketing. An opportunity to integrate these into all Queensland RTO's as we rebuild visitation exists. This needs to be resourced and funded with skilled experts dedicated to creating new innovative product in line with regenerative tourism practices and customer journey experts, insights, marketers and communicators.


DESTINATION MANAGEMENT PRIORITIES

- Work with local partners on a coordinated approach to maximising the visitor economy's potential to 2030 and beyond.
- Increase co-investment in consumer-centric, sustainable product and experience development activities – showcasing Queensland's natural strengths and Indigenous capacity and connection to country.
- Access and enhance support and business advisory /capacity building services for industry to strengthen our destination's sustainability and resilience.

DESTINATION MARKETING PRIORITIES

- Refine target markets, optimise distribution channels and activation.
- In partnership, acquire, develop, market, and grow events of all kinds.
- Position Queensland for the future drawing on regional, demand-driving strengths, highlighting products or experiences that give Queensland a competitive advantage.
- Position the Gold Coast as a gateway into Queensland, capitalising on the destination's globally recognised status in key source markets.



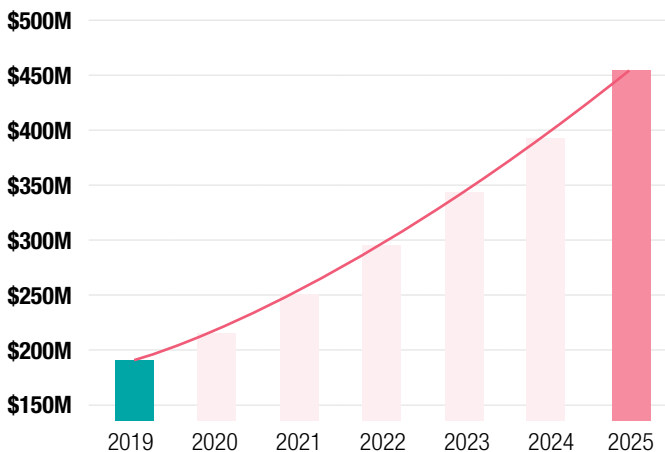
 MIAMI MARKETTA

KEY SECTOR DEVELOPMENT AND ALIGNMENT PRIORITIES

EVENTS

Events play a significant role in showcasing the Gold Coast, growing visitation, and positioning the city as an exciting visitor destination. Events give people a definitive reason to travel whilst providing our city with a great story and imagery that sells the destination as a safe and open place to experience. Destination Gold Coast works collaboratively with state and destination partners to promote events in the region, with a remit of increasing visitor expenditure. The Gold Coast events industry is the largest of any city or region in Australia outside the four major capital cities and benefits from excellent facilities such as world-class sports stadia, and cultural and entertainment infrastructure.

ASPIRATIONAL GROWTH OF MAJOR EVENTS



Major Events Gold Coast was established in 2019 to take a strategic, whole-of-city approach focusing on the delivery and attraction of Major Events whilst building the Gold Coast’s reputation as an events destination hub of significance. Major events’ contribution to the Gold Coast economy pre-COVID-19 is estimated to be more than **\$183 million** annually. The City of Gold Coast, Major Events Gold Coast, and partners such as Tourism and Events Queensland continue to work toward growing the value of major events in the region by **150 percent or \$457 million** by 2025. Destination Gold Coast advocates for increased funding to help realise this aspirational target through strategic acquisition, marketing and delivery of more world class events for the city. Until there is more certainty on domestic and international borders, there is an increased level of risk of losing events. Due to border closures, the Gold Coast Marathon has suffered cancellations in 2020 and 2021 which is likely to impact the ongoing viability of the event. In 2021, the Gold Coast lost the World Surf League event to New South Wales and there is an ongoing threat of losing more events temporarily and permanently to other states. Current performance measures of funding partners are heavily weighted to attracting interstate visitors consequently discouraging investment to defend and grow existing major events in Queensland. While domestic and international border closures remain, it is recommended that criteria for funding is revisited to safeguard the future of these important events.



 RACV ROYAL PINES RESORT

BUSINESS EVENTS

Business events are arguably the most lucrative part of the visitor economy **directly generating over \$35 billion in economic activity in FY19** and employing over **229,000 people** across a broad range of sectors and trades.* In FY19, **43.7 million people** attended more than **484,382 business events** across Australia.* However, the net worth of business events far exceeds the economic contribution to the Queensland economy. There are significant benefits attributed to people meeting face-to-face such as stimulating trade and investment, transferring knowledge, nurturing research collaboration, boosting innovation and productivity, promoting cultural exchange, and attracting global talent.

As our international borders remain closed for an extended period, domestic business events are critical to balance the weekend economy in Queensland to drive visitation from Monday to Friday.

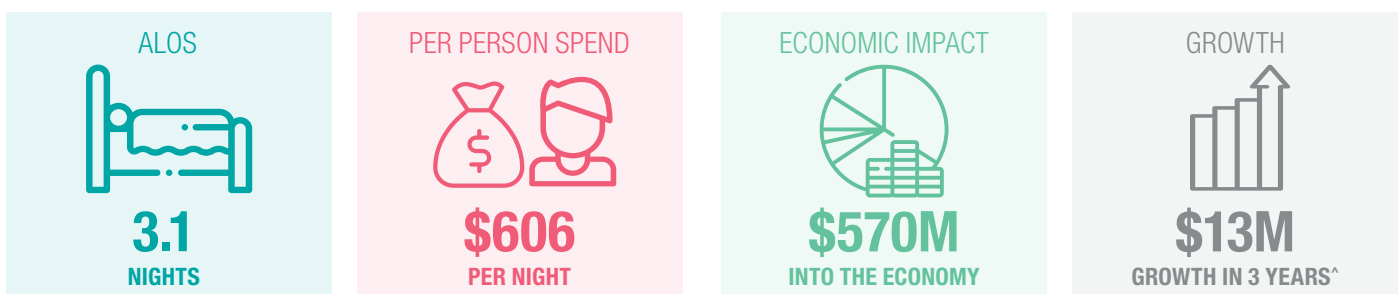
The Gold Coast is Australia's leading regional business events destination offering world-class facilities, convenient access, a portfolio of iconic experiences and the optimum climate. This is a vital sector for the city, ensuring our meeting and accommodation venues, and specialist suppliers can tap into a sector valued pre COVID at over \$570 million and bringing

193,382 delegates** during the week and in traditional off-peak tourism seasons. Prior to the pandemic, Gold Coast achieved a record year, attracting record delegate numbers with one in two conferences being held in Queensland. Historically a domestic business events destination (80 per cent), the Gold Coast is showing positive signs for recovery as restrictions are eased and domestic borders remain open. More appealing than major cities with lower population density, an abundance of green and open spaces, alongside alfresco experiences, the Gold Coast is well positioned to rebound quickly.

The Gold Coast is experiencing increased competition from all Australian cities introducing significant funding offers to attract business events. Cities reliant on international business events are very aggressive in the domestic market with significantly larger budgets so the cost to defend and attract business is much higher. If not managed, this trend will negatively impact Queensland's ability to retain this important and highly coveted business. Our competitors are also able to capitalise and plan strategically for opportunities beyond one year as they have a clear business events government strategy with funding support. Refer to Convention Bureau Funding Table on page 7.

*Value of Business Events to Australia 2018/19, Ernst & Young, March 2020
 **Queensland Business Events Survey (QBES) 2018-19

2019 GOLD COAST BUSINESS EVENTS PERFORMANCE SNAPSHOT



^ From \$557M in 2017 to \$570M in 2019



Additional challenges currently include factors like border closures and business confidence through to risk mitigation for businesses, and financial constraints. Also hybrid events will impact face to face meetings so we need to leverage the virtual conference component to continue to build DGC's profile and reputation. At the same time we need to work with our customers to attract and build events to ensure physical delegate numbers are exceeded.

Queensland operates five convention bureaus – Gold Coast, Brisbane, Cairns and Great Barrier Reef, Sunshine Coast and Townsville and has three state owned Convention Centres – Gold Coast, Cairns and Brisbane. This structure is unique compared to other states that have one convention bureau and one state owned convention centre. Funding is provided on a one-year allocation annually based on estimated economic contribution per bureau. With the average length of a bid taking up to 4 years to research, bid and deliver this funding structure makes it difficult to build up a pipeline when uncertainty of bureau and bid funds is unclear.

To increase Queensland's share in the lucrative yet highly competitive business events market the Queensland Government is encouraged to:

- When international borders reopen, it is essential Queensland is well positioned to aggressively reset aviation connectivity, securing additional capacity so the Gold Coast is accessible to delegates.
- Invest in more robust business events metrics, to drive strategic direction, providing research that is current to maximise our finite resources and to provide a platform to consider investment and growth. Research to include:
 - **Visitor Expenditure** – Broadening the scope of the Queensland Business Events Survey (QBES) to capture all event costs including venue hire; audio visual; theming; functions; accommodation; additional spending in the local area – transport; restaurants; attractions; retail and accompanying guests expenditure.

- **Beyond tourism/economic benefits** – Knowledge expansion; networking; relationships and collaboration; investment and business attraction; future research capacity and industry development.
- **Market Position** – To determine Queensland's unique value proposition, performance, reputation, areas of specialty and opportunity.
- **Social impact** – On the benefits to the local community of business events.
- Support the five current independent convention bureaus in Queensland, as each region has its own distinctive attributes, infrastructure, knowledge sectors, and value proposition. This structure is critical to be competitive, leveraging local knowledge and aligning to local industry sectors to provide the best possible commercial outcomes. The convention bureaus in Queensland deliver \$1 billion** economic impact for Queensland per year which is dispersed into each community through the local network access each convention bureau has.
- In consultation with industry develop a State Government Business Events strategy as part of the Tourism 2030 initiative underpinned by a five-year convention bureau funding commitment. Funding to be allocated via TEQ in proportion to the economic contribution of each convention bureau determined by research and reassessed every year. Funding to be allocated to domestic and international marketing initiatives, trade engagement, and event attraction. Key performance indicators to be determined and reported quarterly. DGC seeks \$1 million annually for five years for Gold Coast Convention Bureau Funding.
- Based on the significant success of the Business Events Investment Program, DGC advocates for the Queensland National Business Events Program (NBEP) and International Acquisition and Leveraging Fund (ALF)

**Queensland Business Events Survey (QBES) 2018-19



 GOLD COAST CONVENTION AND EXHIBITION CENTRE

to be made permanent in addition to TEQ’s annual appropriation. These programs increase conversion of new business in the bidding stage, delivering more events, delivering increased economic impact and allowing Queensland to be more competitive nationally and internationally. The NBEP introduced earlier this year, has attracted six events worth \$4.5 million of economic impact for Gold Coast. In the last three years, the ALF has assisted Gold Coast to secure 9 international events worth over \$29 million economic impact, attracting 10,000 delegates. DGC seeks a Business Events Investment Program, operated by TEQ with a total amount of \$5 million each year, over 5 years to allow for long term planning.

- Continue to invest in expansion and development of hard and soft supporting events infrastructure. Gold Coast Convention and Exhibition Centre (GCCEC) is our largest business events venue with a maximum capacity of 6,000 delegates. This capacity is restricting event growth over time (e.g., Gartner Australasia Symposium – EI \$9 million, 3,000 delegates p/y and Australian Pharmacy Professional Conference - EI \$5 million, 2,000 delegates p/y need to use additional temporary infrastructure to host their event at GCCEC). DGC advocates for the extension to GCCEC to retain and attract large events. Infrastructure support is also needed to ensure that the Gold Coast business events offering remains competitive, e.g. hotel and business event venue development; transport upgrades e.g. light rail extensions and digital connectivity throughout the city

- Initiated Conference Program Development: Identify, cultivate, and deliver (owned) conferences aligned to core capacities or destination assets – regional examples could include Higher Education, Gold Coast Health & Knowledge Precinct / innovation sector linked conferences or Marine industry and/or Ocean Beaches Management related events. To do this we need to have access into government with clearly defined Key Performance Indicators for all parties.
- Pursue opportunities to incentivise decision makers to host their events in regional destinations, to disperse and increase overall economic benefits of business events beyond cities throughout Queensland.
- Build equity with conferences and events through increased longer-term investment versus one-off subvention measures to attract and retain events. Developing a strategic approach recognising that business events are the catalyst to future proofing our economy and workforce. Creating a vision that leverages existing assets beyond tourism, link government as a key state holder and local business innovation and expertise.
- Queensland has the attributes to be Australia’s leading incentive destination state. A stronger incentive – focused reputation needs to be further developed domestically and internationally. With greater resourcing, the incentive market has the capability to accelerate business events recovery as part of a future Queensland Business Events Strategy.

CONVENTION BUREAU FUNDING

REGION	FUNDING PER YEAR
VICTORIA	\$8 million
NEW SOUTH WALES	\$10.6 million
SOUTH AUSTRALIA	\$2.1 million
PERTH	\$6.6 million
NORTHERN TERRITORY	\$2.2 million
TASMANIA	\$1.3 million
AUSTRALIAN CAPITAL TERRITORY	\$2.1 million

Reference: Association of Australian Convention Bureau (AACB) Comparison Report 19-20

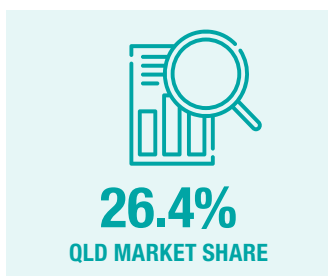


 BURLEIGH HEADS

EDUCATION SECTOR AND THE GOLD COAST VISITOR ECONOMY

The education sector is a major contributor to the Gold Coast's visitor economy and has enormous potential to grow. The International Education Association of Australia named the Gold Coast as the top regional student location in the country. International education has both short and long-term benefits, from immediate economic growth, brand and profiling to a more sustainable economy driven by the best and brightest minds, as well as city diplomacy and trade opportunities. With three world class universities and over 200 quality education and training providers the Gold Coast is a unique education destination. Nowhere else in Australia is there a city that offers access to two international airports within 1 hour; world famous beaches and rainforests; and an education industry that operates year-round.

In 2018, the sector was worth \$1.7 billion to the Gold Coast's economy through direct and indirect expenditure. In 2018, there were 28,423 international enrolments (students studying on a student visa) plus a further estimated 4000 non-student visa holders. This represents 26.4% of the Queensland market share. Total export revenue from student expenditure on fees and goods and services equalled \$640 million.



Destination Gold Coast is committed to working in collaboration with Study Gold Coast and Study Queensland to recover and grow this high value sector both internationally and domestically. Through a coordinated approach, various cooperative activities are being explored and executed in partnership based on merit.

2032 BRISBANE & SOUTH EAST QUEENSLAND OLYMPIC GAMES

With South East Queensland firming as the favourite to host the 2032 Olympic Games, there is a once-in-a-lifetime opportunity for Australia to use the next 10 years as a runway to optimise the benefits of this mega-event. Investment in infrastructure to deliver the 2032 Olympics will stimulate the economy in the lead up. Conservatively, South East Queensland is expected to be home to **4.4 million people by 2031**. Hosting the Olympics would accelerate urban transformation, address increasing demands on our supporting infrastructure and will position the collective bidding regions to compete in the events space on the global stage for decades to come.

With our strategic partners, the Gold Coast will seek dedicated marketing, events, and sports investment attraction funding in the lead up to the 2032 Olympic Games. This games-focused activity will be aimed at attracting major and mass participation sporting events, visitation, students, longer term talent and targeted business events.

With the Gold Coast's existing infrastructure, it has been proven that the region can attract sporting code peak bodies on a permanent basis, training camps or acclimatisation programs as well as major and mass participation sporting events. To maximise this opportunity in the lead up to the 2032 Olympic Games, Destination Gold Coast recommends more strategic alignment with local and state government to strengthen our network, identify potential events and candidates for permanent attraction. An opportunity exists for a dedicated government resource between Destination Gold Coast/City of Gold Coast and Queensland Government combined with new funding for marketing and investment attraction activities.

DRIVE DEMAND - PARTNERSHIPS AND ACCESS

Robust funding models and taking a cross-sector approach to refining of remits of our peak marketing and management entities will be vital to a resilient visitor economy of the future. Through strategic partnerships, relentless pursuit of new markets, enhanced distribution, recovery, defending and growing market share is essential. In the short term, travel bubbles, and vaccine passports should be prioritised. Infrastructure to support tourism is also in need of significant and continuing investment. Destination assets such as airports, convention centres, hotels, attractions, improved ground transport / access and facilitation of more seamless international arrivals will all be key factors to success.



 GOLD COAST BROADWATER

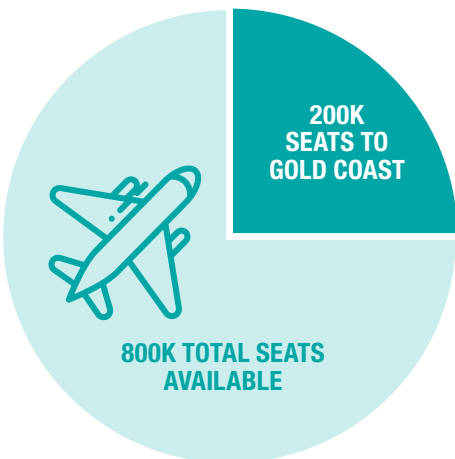
AVIATION

The importance of Queensland’s aviation growth as a driver of increased tourism, visitor expenditure, foreign investment, export and trade, and employment outcomes cannot be understated. The federal Government’s highly successful Tourism Aviation Network Support (TANS) resulted in a massive injection of domestic bookings (more than **200,000 of the 800,000 seats** in the program) into the Gold Coast. Whilst a full recovery will not be achieved until the Gold Coast can again welcome international visitors, TANS has helped to mitigate further losses over the softer winter period. It should be noted however that despite the strong performance of seat sales into the Gold Coast, due to COVID outbreaks and subsequent border management, heavy revenue losses continue to impact the effectiveness of the current TANS initiative.

efforts. The multiplier effect of state and federally supported programs extends beyond the aviation sector to include many elements of the tourism ecosystem.

Although not considered a capital city, the Gold Coast has shown potential as a high performing regional gateway airport servicing many destinations. This is an aspect that can be further developed utilising the Gold Coast’s capacity as a tourism hub to serve as a key access point for other regions. Recent and ongoing upgrades to Gold Coast Airport’s terminal operations worth an estimated \$500 million will enable growth and would be an area for state government to support through future aviation attraction and investment activities.

GOLD COAST SHARE OF AUSTRALIA'S 800,000 TOTAL SEATS BOOKED



PRODUCT AND EXPERIENCE DEVELOPMENT

Investment in new, sustainable tourism experiences or catalytic infrastructure projects should be pursued. Such demand driving projects will deliver increased visitor numbers, expenditure, and jobs for Queenslanders and should be prioritised a legacy outcomes post COVID-19. To succeed, we must partner with all levels of government and the private sector, expanding our tourism offering to meet and exceed consumer demand into the future. The fully subscribed Queensland Government \$48.6 million Attracting Tourism Fund (ATF) established in 2018 stimulated the development of products and experiences in some parts of Queensland from an infrastructure perspective. The Gold Coast benefited from the aviation component (AAIF) however, there was a disproportionately low level of catalytic tourism infrastructure projects funded for the region. In the current economic climate, an increase in quantity and quality of candidate projects is likely to arise if another funding opportunity of scale is offered by the Queensland government. In addition to existing product and experience development initiatives, Destination Gold Coast advocates for significant government funding to stimulate catalyst infrastructure projects and will commit to working with our partners to build business cases based on tourism merit and return on investment.

Coupled with federal incentives, to be competitive in the aviation sector, programs to the scale of the Queensland Governments **\$33 million Connecting with Asia Strategy** and the **\$10 million Attracting Aviation Investment Fund** (AAIF) should be funded in the future to bolster recovery



 ADVENTURE MORETON ISLAND

WORKFORCE, GUEST EXPERIENCE & REPUTATIONAL RISK

Staffing and managing tourism workforce requirements within the fluctuating nature of our visitation cycle remains an ongoing issue. For perspective, during heights of the pandemic’s impact on the Gold Coast’s visitor economy, the Government’s JobKeeper scheme provided support for more than **100,000 staff** equating to **\$150 million** in payments each fortnight. The cessation of the program in March 2021 saw an estimated **49,200 registered Gold Coasters** come off the program. Faced with skills shortages in other sectors, many of these workers have migrated to other industries and are unlikely to return in the short term. Based on our current trend of workforce shortages, the entire sector faces an increased risk of compromising our guest’s experiences and causing long-term damage to our reputation. As evidence, **Tourism and Events Queensland’s Best of Queensland Experiences Program’s (BOQE)** 2021 results revealed that of all experiences assessed state-wide, there was a year-on-year **decline of 10 percent** of (BOQE) qualifiers, importantly, there was also an overall decline in the state’s cumulative online reputation score or **Global Review Index (GRI)**. According to Review Pro, there is a directly attributable increase in revenue to accommodation or experience providers who maintain a higher Global Review Index score.



* According to Global Review Index (GRI)

Attracting talent interstate to fortify Queensland’s tourism workforce may offset some immediate issues however it risks simply moving the issue to another region. More sustainable measures to address the skills shortages need to be explored. Further relaxation of visa and employment restrictions around extended-stay international travellers who are already in Australia and for skilled internationals could fortify the supply of talent.

Some additional measures to build capacity for our tourism workforce include:

- Skilling locals
- Invest in attracting and retaining labour to the industry - career pathways
- Invest in vocational training
- Dispersal of talent

REGENERATIVE TOURISM

Through the World Economic Forum (WEF) and International Business Council (IBC) over 61 global multinational organisations valued at \$6.2 trillion have pledged to measure and report to their stakeholders, investors, and employees on Environment, Social and Governance (ESG’s) along with economic outcomes in their annual reports. To support this in October 2020 the World Economic Forum (WEF) issued a white paper defining common metrics for sustainable value creation based on ESG’s and aligned to the SDG’s.

For instance, companies that have taken the pledge have agreed to report publicly on greenhouse gas emissions, water consumption, and single-use plastics (the Environment pillar). For the social pillar, metrics include numbers on diversity and inclusion, a pay equality ratio, and employee well-being rates. The economy pillar involves economic contribution and total tax paid; and the governance pillar includes information on anti-corruption initiatives.

Queensland and the Gold Coast is ideally positioned to capitalise on the growing demand for purposeful travel highlighting our regions ease of access, pristine climate, growing reputation as a centre for and active and healthy lifestyle, wellbeing, and proximity to remarkable natural assets.

Queensland Government can lead this by establishing metrics and criteria based on standard Environment Social and Governance (ESG) and aligned to the United Nation’s Sustainable Development Goals (SDG) for new product development, guidelines on moving existing product into the system, a positioning and marketing piece to attract visitors, residents, and investors. This can be done in a stepped approach to build Queensland’s credentials in this space.

These qualities that attract our guests have legitimate potential of enticing longer term investment and talent. The city of Gold Coast positions itself as an innovation incubator, attracting venture capital from those who choose the destination based on merit and the ability to operate globally through technology. The City of Gold Coast is the first council in Australia to invest in a carrier-grade fibre optic network. The fibre optic network provides some of Australia’s fastest internet services and accelerates wide-spread installation of 5G. This investment in digitalisation will help prepare for and improve services for residents and guests of the city. Based on this significant regional investment in digitalisation, it is recommended that the state government aligns the Gold Coast’s assets such as digital infrastructure, Global Health & Knowledge precinct, Universities, our industry priority sectors and talent and investment attraction initiatives. Additionally, leveraging core strength areas of the Gold Coast such as the marine, film & screen sectors should continue.



 RICK SHORES

BUSINESS SUSTAINABILITY / CAPACITY ISSUES

For many operators, the cost of doing business is not sustainable in the long term, particularly in terms of the food and beverage offering under fluctuating COVID requirements for the sector. Food and beverage are being well patronised but is counterproductive in terms of the labour costs. Recent news of the relaxation of some COVID-safe measures is welcome however, in the interest of commercial viability, with public health as the guiding principle, it is vital that capacity constraints and the impact on the guest experience and operators are regularly monitored, communicated, and managed. Based on feedback from constituents and ongoing issues with retaining talent in the tourism and hospitality industry, there is a growing concern for our existing industry award rates. The current regulatory environment also presents many operational challenges for the sector which should be reviewed.

BUSINESS SOLVENCY

After sustaining ongoing challenges brought on by the global pandemic, business solvency is an escalating issue facing the entire visitor economy. Under threat are numerous defining and supporting assets that make our destinations unique and accessible to our guests. Instilling investor confidence

in the next few years will be vital to maintaining our tourism portfolios. This applies to all operators of all sizes and in particular, small operators who make up the fabric of much of the sector. It is important that services to assist business are tailored appropriately and are easily accessible. It should be noted that the uncertainty with domestic border closures and associated travel restrictions has resulted in an industry – wide relaxation of cancellation policies to offset a declining consumer confidence. This has been welcomed by consumers however it has the potential of exposing operators to further revenue losses.

According to many of our key tourism operators who are enduring the effects of the pandemic, some have also been directly exposed to the impacts of natural disasters. As a result, property insurance costs have risen exponentially or are unavailable entirely. With support from a state level, advocacy for a national approach to ensuring that critical tourism businesses have access to affordable commercial property insurance needs actioned immediately. It is highly recommended that Australia adopts the National Injury Insurance Scheme (NIIS) model (or similar program) implemented in New Zealand. Such a system would provide affordable and accessible liability insurance for small and medium businesses.

On the following page, the responses to consultation questions have been informed by Destination Gold Coast's internal insights and interaction with our key stakeholders.



RESPONSE TO QUESTIONS

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

Although largely recognised as a built, man-made environment, the Gold Coast's credentials as a sustainable destination should not be underestimated. Unlike many other comparable destinations, the region's economic pillars do not include the unrenovable resources sectors or other unsustainable practices. As the world places more emphasis on solving some of the problems of our society and our planet, the emergence of organisations and entrepreneurs presents an opportunity to embed an agenda that defines South East Queensland and through the visitor economy, attracts investment and people who advocate for sustainable development on a globally recognised scale.

PRIORITIES

1. Establish outcomes-focused measures based on social impact that can be profiled globally. e.g., Corporate Social Responsibility (CSR) as part of leisure and business events activities e.g., unique Australian wildlife and other conservation focused initiatives.
2. Set environmental goals aligned to local, state, national and global targets, e.g., Global: UNESCO's Sustainable Development Goals. Local: City of Gold Coast's Nature Conservation Assistance Program (NCAP)
3. Establish new product / business protocols and robust criteria around regenerative tourism.
4. Articulate authentic, meaningful connections to community and country – respectful, compelling amplification of Indigenous linkages.

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

As a holistic world leading destination that shaped its own future while prioritising its community and protecting its environment for future generations. Queensland fostered innovation by investing in its sustainable industries, attracted visitors with a purpose and delivered defining legacy projects.

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

Altruistic behaviour and protection of natural tourism amenities should be

embraced now and in the future. Although not necessarily missing, particularly since the inception of Queensland's commitment in 2020 & 2021 to the Year of Indigenous Tourism (YOIT), the Gold Coast region has an immense opportunity to build capacity, consistently deliver high-quality experiences and exceed expectations in the Indigenous tourism and events sectors. Already, despite a relatively recent start, some notable successes of Queensland's YOIT include various experience development initiatives including mentoring programs, significant upgrade of marketing assets, enhanced programming of first nations content in existing festivals, and increased funding to support engagement of specialised, Indigenous talent to deliver experiences. Awareness and opportunity of Indigenous tourism has been heightened in Queensland however, certainty beyond 2021 has not been confirmed. Acknowledging the great work and momentum instigated by Queensland's YOIT, and ongoing experience development – focused partnerships between the state and regions should be formalised. This could be achieved through a suite of incentive-based initiatives.

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

- Consolidate Indigenous connections to country that will protect the assets and resonate with all communities and visitors by developing and delivering high-quality, sustainable guest experiences that demonstrate the cultural significance and value to the people and the destination.
- Set benchmark in Queensland for environment, social and corporate (ESG) standards.
- Where practical, establish and monitor best practice environmental standards for existing and emerging products and experiences aka TEQ's Best of Queensland Experiences Program.
- Stimulate new, sustainable infrastructure products through government incentives for joint venture activity.
- Establish an investment attraction program aimed at purpose-led organisations.
- Further refine and leverage Queensland's gold standard safety and hygiene reputation.



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

- Regional, Asia Pacific source markets will be the foundation for the short to medium term, therefore given our collective finite resources, return on investment should be carefully considered.
- The seismic shift in behaviour towards working remotely and meeting virtually.
- Permanent change in the way people will travel, much of the world has evolved from over tourism to minimal or no tourism. Significant portion of locals and potential source markets have embraced conditions without crowds and reduced negative impacts on the environment – aspirations of purposeful travel will continue to grow.
- Based on pressure placed on the economy by the pandemic, visitors are looking for value for money experiences.
- Shorter booking lead times, for both leisure and business events travel.

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

- Nurture more multi-generational, purpose-led, community building activities by region.
- Commit to a consultative, meaningful, respectful first nations interpretation of significant nature-based experiences / places such as walking circuits, bodies of water and other iconic demand-driving tourism assets.
- Immersion programs into the Indigenous community supporting education, cultural development, and connections to (Queensland) country.
- Showcase Queensland's rich agricultural history and capacity and develop knowledge of sustainable farming for the future
- Consistently refine the regulatory environment to accommodate contemporary, practical application.
- Embed a culture of digitalisation of tourism businesses across the state.

7. WHAT DO YOU SEE AS THE OBSTACLES TO PROGRESS?

- Generally, tourism is not perceived as an economic driver or career aspiration for younger generations.
- Capacity of workforce and cost to service the industry.
- Government's appetite and capacity to commit to long-term change
- The Regulatory Environment.
- Agility to implement new ideas to market quickly.

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

- In consultation with Queensland peak industry bodies, identify and support critical tourism products and experiences through resilience / recovery grant funding programs – this includes small to medium businesses and major, demand-driving attractions.
- In consultation with peak bodies and industry, boost investment through a formalised tourism experience design and capacity development (including Indigenous) multi-year funding program centred on robust criteria and return on investment.
- Position Queensland as the destination of choice for meaningful travel and raise the profile of Queensland's Indigenous culture, World Heritage listed areas and walking trails.
- Partner with National Parks to enhance supporting infrastructure to meet continued demand.
- Significantly enhance investment in new, environmentally compliant catalyst tourism projects that will drive demand.
- Recover and grow market share through consumer-centric informed strategic partnership activities transcending interregional, interstate, and international borders.

From a global standpoint, Australia's management of COVID-19 has been the gold standard. From a state perspective, it is imperative that we embrace the opportunity for our economy to capitalise on the sacrifices endured to protect Queenslanders. On behalf of the Gold Coast's tourism industry and the more **than 44,000 supported local jobs**, we table these considerations and look forward to working with the Government and our industry to pave an exciting and innovative pathway forward.