

Towards 2032

Reshaping Queensland's visitor economy to welcome the world

SUMMARY

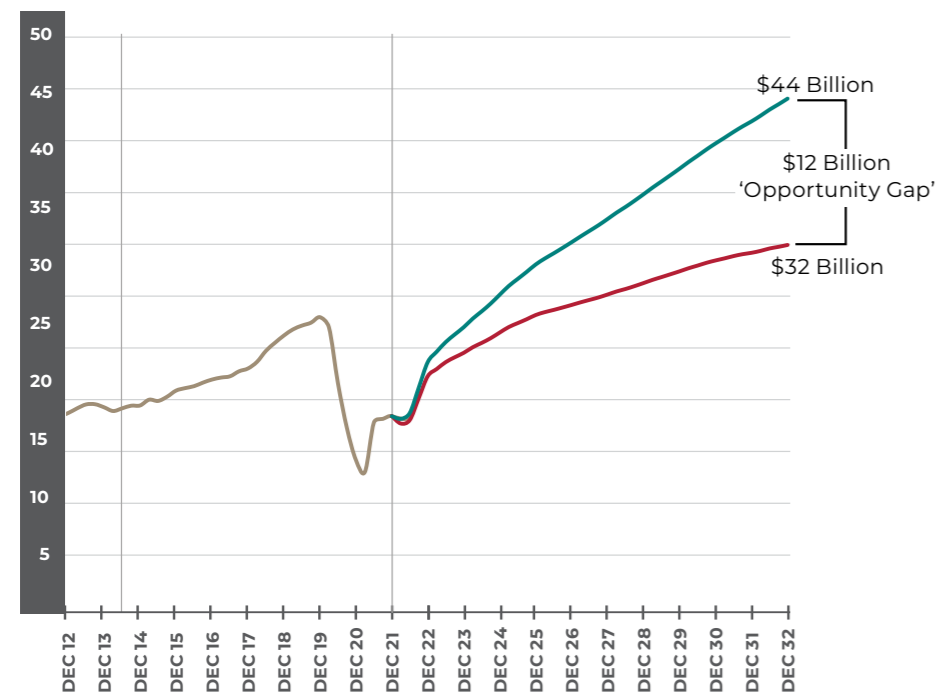
There are clear opportunities ahead of us – the reopening of the world after the pandemic lockdowns; the green and gold runway ahead of the Brisbane 2032 Olympic and Paralympic Games; and the chance to grow Queensland's visitor economy.

The Panel engaged a body of work to be undertaken to look at two key scenarios – maintain 2019 share through to 2032 or restore and maintain the peak market share through to 2032. This presents a difference of \$12 billion in visitor expenditure for Queensland.

The Panel proposes these expenditure figures be adopted as our aspirational growth goals for Queensland's visitor economy.

While expenditure continues to be the primary measure of success, the Panel recommends a balanced scorecard – so community, environment and customer experience support the economic benefit.

Forecast total visitor expenditure to Queensland by growth scenario



VISION

By 2032 Queensland will be Australia's destination of choice for domestic and global visitors seeking the world's best experiences.

MISSION

We'll encourage people to visit again and again by remaining 'cutting-edge relevant' – continuously reimagining and reinventing our offering for the benefit of visitors, our communities and the environment.

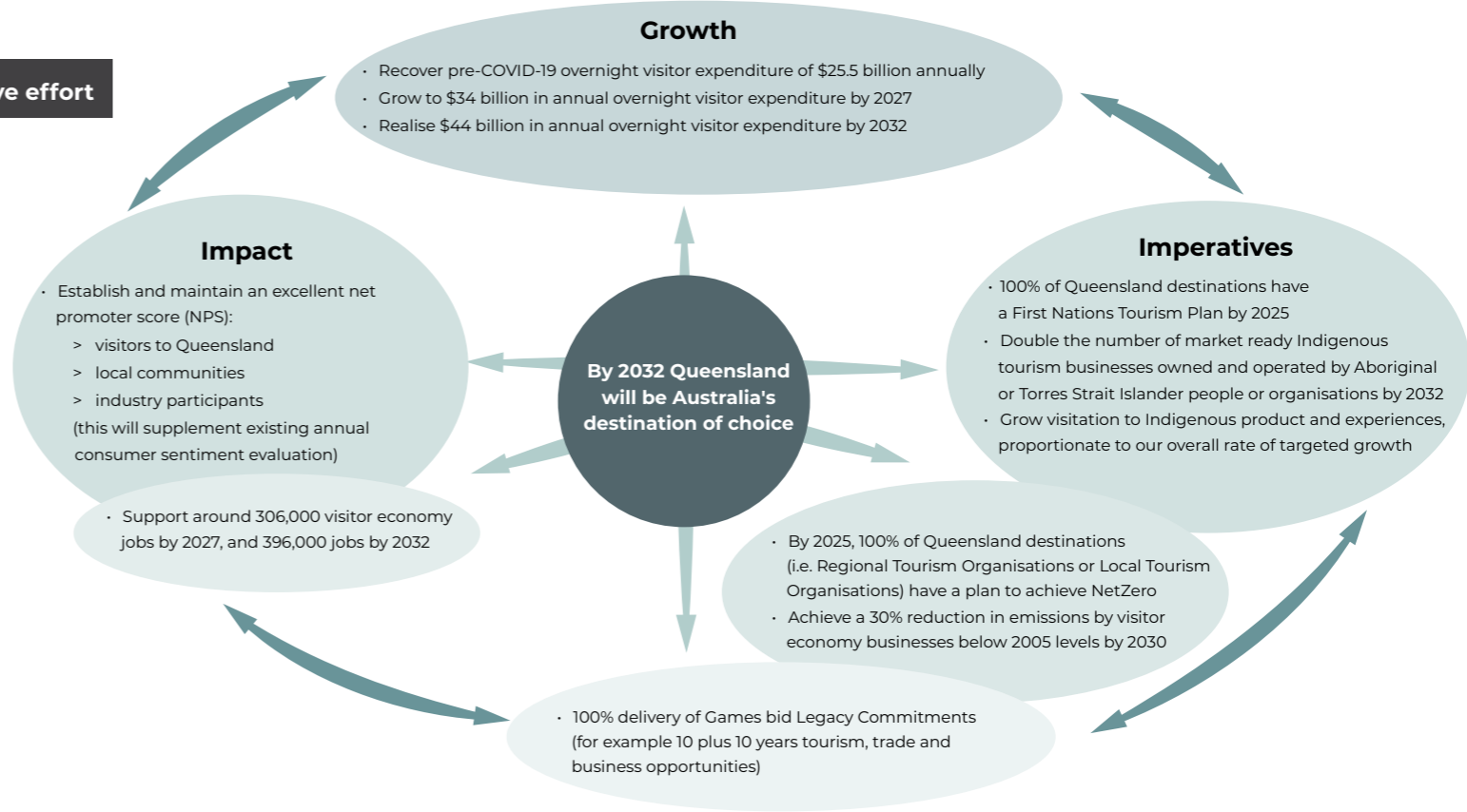
TOP 10 GAME CHANGERS

- Reimagine our Coast, Beach and Island offering
- Enhance our appeal to families, couples and students
- Deliver tech-wonderment
- Create more touring opportunities
- Own tropical and marine adventure
- Become a regenerative tourism leader
- Refresh and develop our places to stay
- Hero authentic culture, including via new venues
- Visitor-first mindset
- Enabled via sustainable funding

Within the Plan, the Panel recommends 75 actions across three key areas:

- Demand, Supply and Connectivity
- Catalysts for Change
- Enablers of Change

Goals to focus our collective effort



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RECOMMENDATIONS SUMMARY

Panel recommendations

Demand, supply and connectivity

Experience Development Fund

1. Establish a new \$140 million fund to develop significant new and visionary products and experiences, including a contemporary refresh of existing iconic products and experiences, to meet tomorrow's visitor expectations

2. Co-fund projects in line with the opportunities set out in this plan that meet economic, community impact and sustainability criteria

3. Fund to be governed by an independent commercial entity with a skilled and diverse Board, including First Nations representation

Growing Tourism Infrastructure Fund

4. An injection of \$50 million into the Growing Tourism Infrastructure Fund to enable critical tourism infrastructure investment, including in accommodation as a priority

5. Deliver amenities, improve accessibility and deliver built assets that improve the 'lived experience' of the visitor

6. Future-proof our infrastructure, particularly with regards to sustainability credentials and climate resilience

7. Funding to be available to upgrade and overhaul existing critical tourism-related infrastructure as well as new projects

Events and marketing investment

8. An \$80 million increase in contestable funding for events and destination marketing

9. Grow the year-round events calendar with distinct funding for the development of homegrown events including to promote dispersal and off-peak visitation

10. Maximise the so-called "green and gold runway" opportunity for enhancing tourism and trade in conjunction with culture, lifestyle, business and sporting events, in the long lead-time to the 2032 Games

11. Ensure the domestic visitor opportunity is fully captured through new campaign and partnership activities – pivoting to international opportunities when the time is right

International education and training

12. Build a more competitive position for Queensland's various study destinations with international students and their networks of influencers, by better aligning state, commonwealth and local government efforts

13. Leverage Queensland's research, innovation and industry strengths including appealing new fields in which Queensland has a compelling advantage, like sports science in the lead-up to Brisbane 2032, or marine science on the Great Barrier Reef

14. Develop tourism experiences and career pathways that appeal to international students and their influencers and promote available travel options to students

Aviation Fund deployment

15. Maximise the \$100 million government investment to rebuild aviation access to Queensland

16. Apply a new, "whole-of-plane" assessment criteria for deploying the fund

17. Secure new, direct international routes, ensuring that our targeted visitors can access Queensland's destinations. Promote regional dispersal.

18. Recapture and then maintain or exceed our pre-pandemic peak market share of domestic and international aviation seat capacity

Improve access throughout Queensland

19. Align aviation route priorities with other modes of transport (for example, accelerating the rebuild of the cruise industry) to support the flow of visitors into and throughout Queensland

20. Further develop a Queensland Touring Strategy, including better promotion of established drive routes

Business Events Strategy

21. Create a shared Business Events Strategy to position Queensland to leverage our state's diverse offerings and competitive strengths to build on the doubling of investment

22. Better align Queensland's industry and research strengths and trade and investment activities to improve the value proposition for event organisers

23. Longer term funding commitments to better support the bidding cycle

Catalysts for change

Accelerate ecotourism

24. Investment to establish and maintain world-class National Park and protected area infrastructure (including, walking/hiking trails, mountain bike trails, trailhead facilities, wayfinding, signage, interpretation, expert guides, and other facilities)

25. Through First Nations consultation, seek to open more areas of National Parks to overnight public stays (and infrastructure) including reasonably limited access in partnership with private operators as accepted in other states

26. A funding stream specific to incentivising ecotourism projects (with increased gearing for projects which are regenerative) as part of the Destination Development Fund to be managed by Destination Development Queensland

27. Consideration of new category of protected area when adding to protected estate

28. Continued realisation of opportunities in areas adjacent to National Parks

29. Review Queensland's legislative and policy framework and approvals process in the context of national and international competitors and progress changes to position Queensland as an ecotourism leader and capture market share

30. Ensure all on-country tourism involves deep First Nations consultation and results in financial and non-financial benefits accruing to Traditional Owners

31. Enhance transparency and build a sense of urgency in approval processes, including with clear KPIs to guide agency consideration and reduce wait times

Sustainability and Climate Adaptation Plans

32. Develop Sustainability and Climate Adaptation Plans for Queensland's visitor economy (and local variations) that encompass:
 - actions on climate change adaptation and transition
 - actions to reduce carbon emissions to net-zero by 2050
 - social impact and governance (such as diversity, equality, and wellness),
 - energy, plastics, water and waste management
 - circular economy operations and biodiversity management.

33. Funding for regions to ensure capability to develop and implement plans

34. Establish guidelines to deliver the Plan including:
 - metrics and criteria for Environment, Social and Governance (ESG) outcomes
 - alignment with the United Nations Sustainable Development Goals (SDG) for new product development.

35. Communications to explain the industry pathway to visitors, residents and investors

First Nations leadership

36. Support regions to develop and implement a First Nations Tourism Action Plan, led by First Nations people, to map a practical way forward

37. Support the creation of new Indigenous-owned and operated businesses through programs identified and led by First Nations people

38. Extend cultural understanding via, for example, similar programs to those run during the Year of Indigenous Tourism

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RECOMMENDATIONS SUMMARY (continued)

39. Continue to create access to opportunities for Indigenous peoples in the tourism industry

40. Maintain commitment to Destination IQ, an initiative of QTIC hosted by the QTIC Indigenous Champions Network, which has grown to become a stunning annual showcase of First Nations Tourism activity in Queensland

Brisbane 2032 Olympic and Paralympic Games

41. Create a plan to maximise the Brisbane 2032 opportunity for Queensland's visitor economy

42. Leverage the 10-year runway to the Games to deepen relationships within key international source markets, especially India, which has a population of 1.3 billion people, 60% of whom are under 35

43. Appoint a representative tourism industry panel to engage with a united voice on material opportunities of development, legacy and impact

44. Use our hosting of the Paralympic Games as a driver for the State to become a leader in accessible tourism

Enablers

Attract and facilitate investment

45. Review investment processes, including cross-government approvals, with the objective of increasing transparency, reducing complexity and speeding up approval gateways

46. Embed an 'industry-as-a-customer' approach to government service delivery, including actively pursuing and supporting investors and proponents

47. Annual investment conference to showcase opportunities, including to superannuation fund managers and other private sector participants

48. Maintain a prospectus for investment in Queensland's destinations, and proactively promote visitor economy investment opportunities

49. Continue to urgently advocate for a national approach to insurance to ensure that critical tourism businesses have access to affordable commercial property and public liability insurance

Enable priority developments

50. Government creates a pathway to prioritise approvals for tourism infrastructure projects, potentially drawing on disaster recovery legislation, priority economic development legislation, including the Economic Development Act and/or the Planning Act

51. Government consider simplifying lease conditions or offering freehold title to attract renewed investment and enhance the viability of island reports

52. A priority pathway should be available for at least the first three years of recovery as a trial with the aim of reducing hurdles, increasing speed and creating transparent conditions of approval for developments

Grow talent and skills

53. Extend funding to enable proven Business Capability Programs to continue and scale

54. Form a working group of government, universities and private sector organisations skilled at identifying emerging talent to design and facilitate short and long term-solutions including:

- Accelerate skills pathways (professionalising careers in the visitor economy), including funding unaccredited training and micro-credentials to enable rapid, 'on-the-job' pathways to roles in industry
- Future skills mapping to inform future education and training requirements for the industry and to highlight the role tourism can play as part of the solution in the state's skills transition, particularly in remote and regional areas
- Establish new programs specifically designed to ensure world-best practice in the delivery of customer service.

55. Maintain and create new mentoring opportunities to accelerate know-how and talent readiness

56. Establish a Queensland Tourism Knowledge Hub in conjunction with our universities to coordinate visitor economy research and development activities

57. Incentivise supply of worker accommodation in visitor hotspots – e.g. Noosa/Airlie Beach, potentially accompanied by packaged-up 'job plus accommodation' for workers

58. Advocate to the Australian Government the relaxation of visa and employment restrictions around extended-stay international travellers, including right-to-work after studying, to fortify the supply of talent

Deploy innovation, technology and data

59. Incentivise technology adoption and data use with seed funding and grants

60. Encourage tourism businesses to apply for innovation grants and secure funding via the Advance Queensland initiative

61. Pilot automation and other disruptive technologies, to unlock industry productivity and enhance the visitor experience

62. Establish a design group (government, industry and universities working together, including via innovative partnerships), to explore:

- the application of open-source data for predictive demand, distribution and planning
- the use of data to understand and personalise engagement with future visitors - putting the visitor at the centre.

63. Consider specific tourism applications and needs when fostering digital skills and capabilities in the Queensland workforce at large

64. Support tourism businesses to use and deploy technology, and transition to digital through capability programs

Funding the future

65. Legislative change to provide local governments with the ability to implement a visitor levy guided by the following principles:

- Visitor pays
- 'Line-of-sight' expenditure – revenue raised is hypothecated for tourism purposes
- Locally (by destination) determined charging basis and amount/rate.

66. Levy, where appropriate, fees and charges to recoup running costs and re-invest in our national parks and protected areas (e.g. similar to existing park use fees and marine park visitor fees)

New ways of working

67. Expand representation of 'tourism' in planning and decision-making forums to include a wider range of aligned industries working in the visitor economy

68. Pursue strategic delivery partnerships, common user infrastructure platforms and accelerate engagement with newer partners (including those that cross traditional industry boundaries)

69. Develop new mechanisms for sharing knowledge and information and working collectively to realise opportunities, in particular:

- mentoring (industry peers and outside sector leaders)
- knowledge-sharing events
- think tanks and advisory panels, including a Youth Council and International Markets Panel of representatives from target international source markets.

Coordinating delivery across the tourism network

70. Confirm the roles and responsibilities of organisations within the visitor economy ecosystem and align operations to best meet the needs to industry and visitors

71. Ensure sustainable funding for regional and local tourism organisations

72. Build stronger relationships between the STO, RTOs and LTOs with the aim of having regional resources working as closely together as possible

Staying on Course

73. Adopt a balanced scorecard of goals and measures to guide collective action and behaviour

74. Review and present progress against this plan annually, at *DestinationQ Forum*

75. Establish a 'Towards 2032' Cabinet Committee with relevant Queensland Government Ministers to fast-track implementation of the plan