



DESTINATION SUCCESS

State of the Industry 2014



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Foreword

Our goal is to make Queensland Australia's leading tourism destination.

The *DestinationQ* partnership between government and industry is the basis for achieving this. This partnership is now in its third year. In the first year we addressed many of the problems facing the industry. Then, in the second year, we reported on the progress made and laid out a vision and strategic directions for the long term. *Destination Success: the 20-year Plan for Queensland Tourism* is innovative and well under way.

It is important that we can report on progress and monitor the outcomes of our efforts. We are very pleased to present this, the first Queensland State of the Industry Report. We propose to use this as the model for annual state of the industry reports which will keep us on track as we near our 20-year target.

This report was a collaborative effort with our industry partners, the Queensland Tourism Industry Council (QTIC), the state's Regional Tourism Organisations (RTOs), and our universities' schools of tourism. Inclusion of contributions from industry, regions, education and government for the first time presents a rounded picture of the tourism sector in Queensland.

We have an ambitious target to achieve together—to increase visitor expenditure to \$30b by 2020. To achieve this, we not only need to look forward, but we also need to take stock along the way, look at what we have done over the year, and celebrate our successes and hard work.

We also need to pause and think about what we could do better, investigate new and emerging priorities, and look at ways we can be more productive as a government and industry in advancing the tourism pillar. Likewise, we need to consider what we need to do going forward. The annual *DestinationQ* forum provides the opportunity to do this.

We achieved a lot together in the past year, and we will achieve a lot more in the years to come.



The Honourable Campbell Newman MP
Premier of Queensland



The Honourable Jann Stuckey MP
Minister for Tourism,
Major Events, Small Business
and the Commonwealth Games



Mr Shane O'Reilly
Chairman,
Queensland Tourism Industry Council

Post Forum Working Group Foreword

The *DestinationQ* partnership between the Queensland Government and the tourism industry is strong.

The first forum gave industry a chance to bring issues and challenges to the table. These were accepted and have been addressed by the partners with detailed actions. Significant progress has been made, and continues. The second forum shifted towards the long term success of the tourism industry. The process of building a vision from the ground up allowed industry and government to co-own the vision—ensuring we work together.

This State of the Industry Report is a significant milestone—it brings together data about our overall performance, reports from regions across the state, and details progress against the action plan.

All actions have been about outcomes, independent of structure. In a genuine partnership model the whole is greater than the sum of the parts. We will always be interdependent in the tourism network and, as partners, we can leverage our collective resources.

The partnership has succeeded in building trust—together, we have made commitments and delivered them, and been able to discuss sometimes difficult issues. This creates a strong basis to move forward.

The 2014 forum builds on the previous two. We have a long-term plan, a vision for success, and a major milestone to reach in 2020. There is renewed optimism and confidence.

Achieving this vision, meeting our target, and our ultimate success requires all of us to stretch, to excel in delivering value to the consumer. Placing the consumer at the heart of everything we do is essential.

Our destination focus sets Queensland apart and our destinations of the future must be defined by the consumer and how they see the experiences within Queensland. Our network must support how we meet consumer expectations.

Achieving our ambition for tourism requires individual commitment from every stakeholder and operator to deliver the best experience and a collective commitment to work together to support our destinations. This is the focus of the 2014 forum.



Dr Richard Eden,
Director-General—Department of
Tourism, Major Events, Small Business
and the Commonwealth Games (Chair)



Mr Shane O'Reilly,
Chairman—Queensland
Tourism Industry Council



Mr Daniel Gschwind,
Chief Executive Officer
— Queensland Tourism
Industry Council



Ms Mary Carroll,
Chief Executive Officer
—Capricorn Enterprise



Ms Laura Younger,
General Manager
— Australian Timeshare and
Holiday Ownership Council



Mr Ron Chapman,
Chief Executive Officer
—Caravanning Queensland



Mr Stephen Gregg,
Chairman—Tourism and
Events Queensland



Ms Leanne Coddington,
Chief Executive Officer
—Tourism and
Events Queensland



Mr Martin Winter,
Chief Executive Officer
—Gold Coast Tourism Corporation

Executive Summary

This is the first State of the Industry Report developed in partnership with QTIC, the RTOs and our universities. The report brings together data about our overall industry performance, reports from destinations across the state, and progress against the *Destination Success* Action Plan.

By focusing on the right markets, focusing on what customers really value and leveraging the power of working together, we are making good progress against the action plan.

Building strong partnerships

Growing tourism requires strong collaborative partnerships between government and industry. Building upon our existing relationships, and finding new ways to work with and support each other is a critical task. Highlights include:

- The Tourism Cabinet Committee (TCC) continued its strong focus on strategic tourism priorities, meeting six times, including two joint meetings with the Board of QTIC.
- Supporting local government in their decision making through the provision of guides such as the Next Generation Tourism Planning Guideline and the Queensland Camping Options Guideline.

Preserve our nature and culture

Opportunities exist to maximise tourism around our heritage, arts, culture, nature and Indigenous tourism experiences. Highlights include:

- launch of the *Queensland Ecotourism Plan 2013–2020* to raise Queensland's profile as a leading ecotourism destination in Australia
- legislative changes to support tourism investment in ecotourism facilities on national parks
- strong private sector interest in delivering innovative ecotourism tourism product due to a commercially attractive investment model
- release of three ecotourism concept master plans to boost investment and visitation
- launch of the *Arts for all Queenslanders Strategy*—which includes strengthening cultural tourism as one of its four priorities
- delivery of events reinforcing Brisbane's reputation as a hub for cultural tourism visitors such as the highly successful *Cai Guo-Qiang: Falling Back to Earth* exhibition at the Gallery of Modern Art (GOMA).

Deliver quality, great service and innovation

Delivering a quality experience to visitors is about a committed and skilled workforce able to provide a 24/7 high-quality customer service. Highlights include:

- \$32.16m state government investment to provide training to 18 034 students in tourism and hospitality
- pilot of a new registered trade skills pathway for 50 students in commercial cookery to support training arrangements for industry's mobile and casual workers
- \$175 000 provided for language and cultural awareness, targeting Asian languages and cultures, and other emerging markets
- Continued industry and government lobbying for federal visa reforms, including expansion of the second-year working holiday subclass 417 visa to include consideration of tourism employment within regional areas.

Target a balanced portfolio of markets

Through targeting a combination of domestic, intrastate and international visitors, Tourism and Events Queensland (TEQ) focuses on a collaborative approach to maintaining existing markets and securing growth from new markets. Highlights include:

- joint domestic campaigns delivered for all Queensland destinations
- targeting emerging international growth market opportunities while maintaining activity in traditional international markets—marketing campaigns were undertaken in the key international source markets of New Zealand, the United States of America, Germany, the United Kingdom, Singapore, China, the Middle East, Japan, India, Korea, Taiwan and Hong Kong
- staging of a highly successful Australian Tourism Exchange in Cairns (ATE14). ATE14 showcased all the region has to offer—590 buyer delegates from 36 countries met with 1200 Australian sellers at the Cairns Convention Centre from 11 to 15 May 2014. TEQ delivered 50 pre- and post-familiarisations within Queensland to enable 339 ATE14 delegates to experience other parts of the state.

Offer iconic experiences

Queensland needs to continue to provide the signature experiences and iconic attractions our visitors expect—and we will also need to exceed expectations. Highlights include:

- development of Destination Tourism Plans (DTPs) with agreed actions and priorities for each region to drive growth towards 2020
- further development of the ‘experiences’ approach to tourism product development and marketing
- maintaining a dynamic calendar of major and regional events that further enhances the appeal of Queensland destinations
- new major events secured include the Rugby League Four Nations ‘Double Header’ being held in Brisbane in 2014, the Bundaberg Cup Touch Football being held annually from 2015 to 2020 in Bundaberg, and the Australian Open Lawn Bowls being held annually from 2015 to 2019 on the Gold Coast
- 85 events supported by the Regional Development Program (RDP) across Queensland in 2013–14 and \$1.9m awarded to 75 events scheduled to take place between 1 April 2014 and 31 March 2016.

Grow investment and access

Encouraging new investment in tourism requires a pro-business environment, red-tape reduction and active work to encourage new projects. Highlights include:

- delivery of three *Tourism investment master classes* in Brisbane, Mackay and Cairns, providing Queensland companies with insights into how investors assess investment proposals and how to work with investors
- improved land tenure arrangements for long-term tourism investment, and faster and more flexible rent calculations for industry during periods of hardship
- a number of major tourism projects declared by Queensland’s Coordinator-General, including Great Keppel Island resort (worth \$600m); the Ella Bay integrated tourism and residential community (\$1.4b); and the Shute Harbour Marina Development (\$252m)

- \$4.8b of planned transport and roads infrastructure investment in 2014–15, which will benefit tourists as they travel around the state
- new airline routes attracted through the \$8m Attracting Aviation Investment Fund, including China Eastern’s seasonal service between Shanghai and Cairns, Air New Zealand’s program of flights operating between June and October from Auckland to the Sunshine Coast, AirAsia X’s service between Kuala Lumpur and the Gold Coast increasing to seven per week, and Emirates’ upgrade to an A380 aircraft on its daily Dubai–Brisbane–Auckland service
- liquor and gaming red-tape reduction, including 50% reduction in processing times, removal of 60 requirements for licensing and compliance, and exempting tour operators from the *Liquor Act 1992*, to the extent they may supply a limited amount of liquor (two standard drinks per client per day) to clients who are part of a tour
- ongoing implementation of the *Queensland drive tourism strategy 2013–2015* (QDTS) including:
 - commitment to a three-year program of investment in tourism signage
 - launch of the *Best practice guide for roadside rest areas*—to provide contemporary ‘best practice’ guidance on the development or upgrading of the state’s roadside rest areas, to enhance the visitor experience for drive tourists.

All of this has been achieved in partnership with industry to grow tourism.

Our state (of the industry)

State of the Industry 2014

Target

Increase overnight visitor expenditure to \$30b by 2020

Vision

Our diverse iconic experiences will be the foundation of our destinations, and our destinations will be the foundation of our tourism success.

Our destinations will showcase the best of Queensland—our people and lifestyle, our culture and heritage, our natural wonders and climate, and our communities.

The tourism industry will be strong and prosperous, fully engaged with governments and the community, and universally recognised as fundamental to Queensland’s economic, environmental and social future.

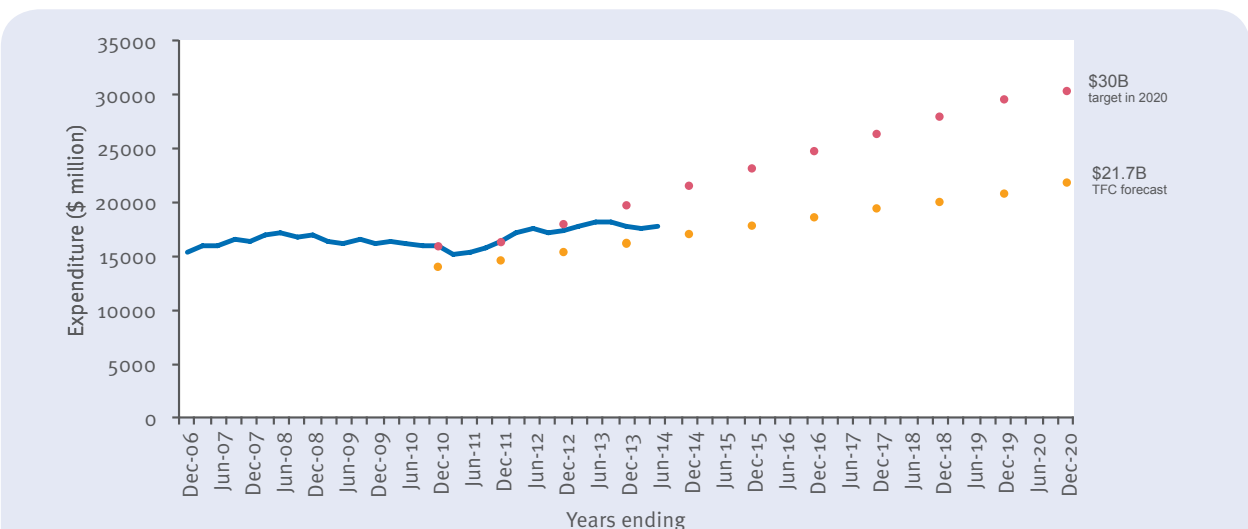
Why tourism matters in Queensland



Source: Tourism Research Australia, State Tourism Satellite Accounts 2012-2013. Australian Bureau of Statistics, Australian National Accounts: State Accounts 2012-2013.

2020 progress

Total Overnight Visitor Expenditure in Queensland against the 2020 target

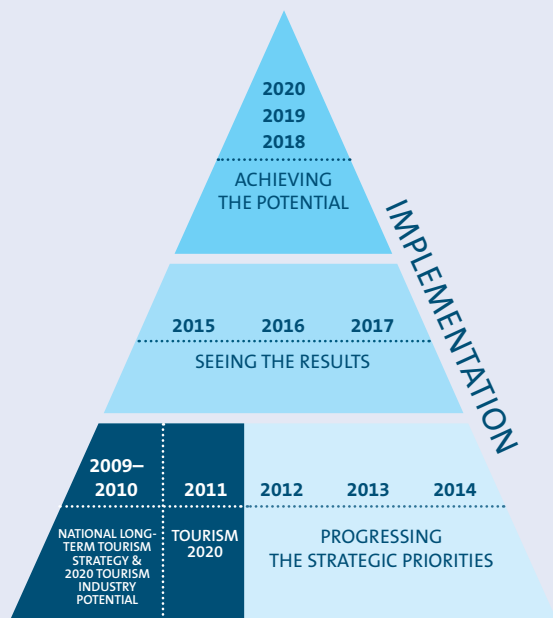


2020 tourism industry target

Total domestic and international overnight visitor expenditure to Queensland, tracking towards Queensland’s 2020 target (year ending) (\$).

Source: Tourism Research Australia (2014), Deloitte Access Economics (2012)

2020 tourism industry target



Queensland’s total overnight visitor expenditure for the year ending June 2014 was approximately \$17.7b, which is between the Tourism Forecasting Committee’s original forecast as at 2010 and the target for that time.

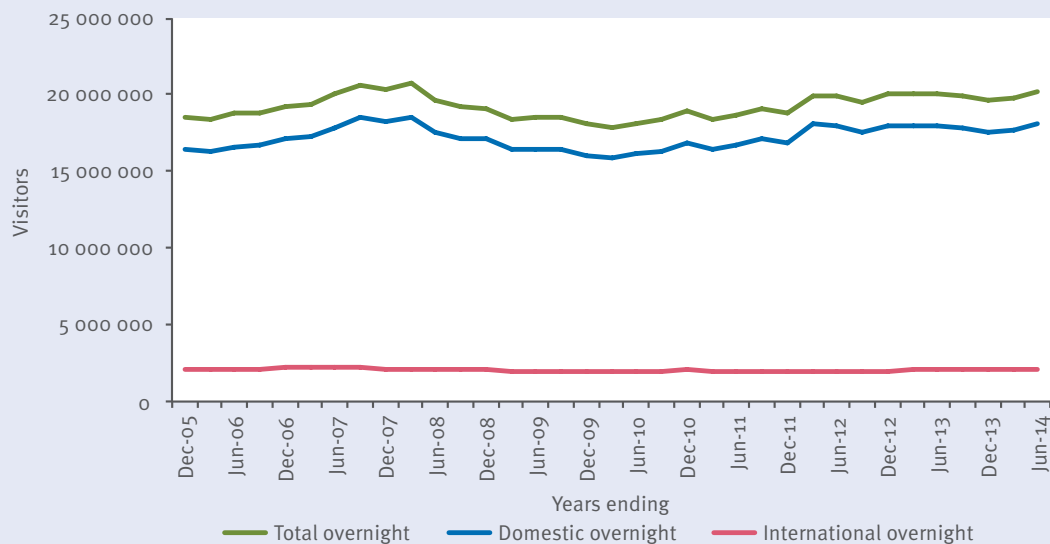
Aligning with Tourism Australia’s plan for reaching the 2020 target, Queensland has been setting the foundation since 2012, and from next year we should start seeing a closer alignment with the target. In the last three years we have established the *DestinationQ* partnership with industry. This agenda has specifically focused on addressing the challenges and opportunities Queensland’s tourism industry faces now and over the next 20 years, including reaching the 2020 target. Joint government-industry action plans and annual forums to track progress and keep working towards our target has led to a more cohesive and accountable tourism industry that is seeing positive change.

For example, we helped to attract \$71 million in investment in 2013-14, exceeding our target of \$25 million. We also now have a new Tourism State Planning Policy and guidance material to reduce the complexity of the planning system for investors, including reduced costs and timelines for proponents and councils for greater certainty and clarity on their proposals. We have also cut red tape to create an environment conducive to investment, including the streamlining of liquor licences and gaming laws, reduced green tape, and simplified and attractive drive tourism signage.

We are building strong Queensland destinations through a suite of 13 world-class destinations each with their own unique brands. In partnership with Queensland’s Regional Tourism Organisations and industry, we are delivering activities that aim to increase a destination’s exposure to its target markets and boost visitation and expenditure across the State, including marketing, publicity, promotions, industry capacity building and experience development. Additionally, we have supported the development of a destination tourism planning framework for outlining tourism and events priorities towards 2020. Together, these efforts will help us achieve *Destination Success*, and our 2020 target.

Visitors

Total overnight domestic and international visitors to Queensland (year ending)



Source: Tourism Research Australia (2014)

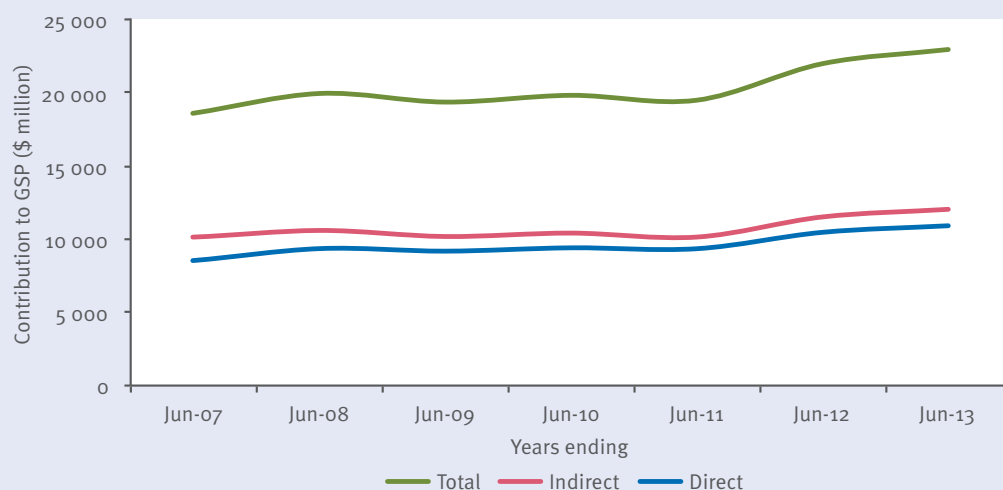
A total of 20.1m international and domestic overnight visitors came to Queensland in the year ended June 2014. These travellers spent a total of \$17.7b on their trip to Queensland.

Our tourism industry is operating in an intensely competitive national and international environment

with a range of influencing factors including global shocks, natural disaster impacts and the strength of the Australian dollar. To meet the ambitious target of \$30b in annual overnight visitor expenditure by 2020 will require a sustained, whole-of-industry effort over the next five years.

Economic contribution

Direct tourism contribution to GSP (year ending) (\$)



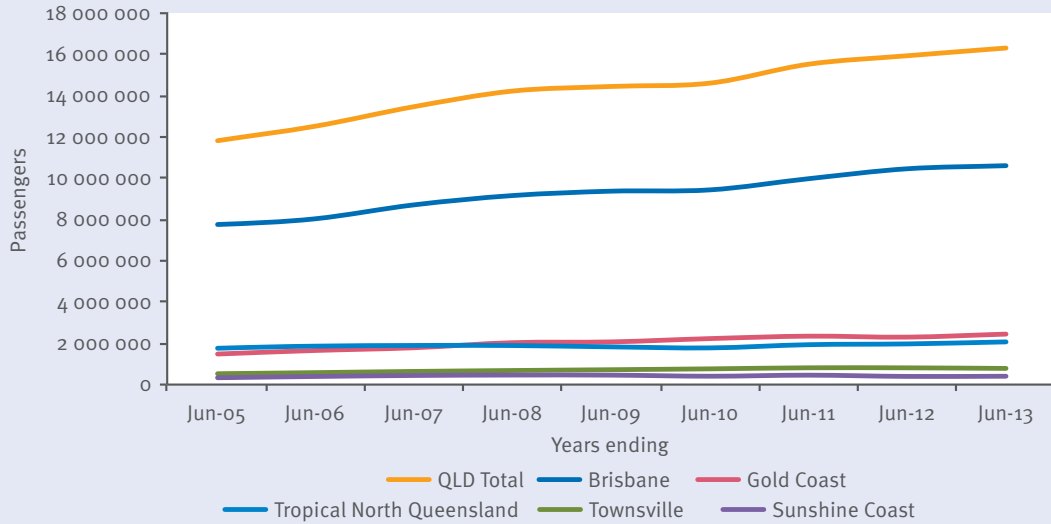
Source: State Tourism Satellite Accounts 2011–12, Tourism Research Australia (June 2013)

In 2012–13 tourism directly and indirectly contributed an estimated \$23b to Queensland's Gross State Product (GSP) or 7.9% of the total, third only to construction and mining (\$26.4b and \$24.9b respectively).

This is made up of \$10.9b direct (3.8%), and \$12b indirect (4.2%) contributions to the Queensland Economy. Over the past 6 years, total tourism contributions to GSP have grown an average 3.7% per annum.

Airline capacity

Total inbound passengers on all domestic and international airlines by major airport (year ending)



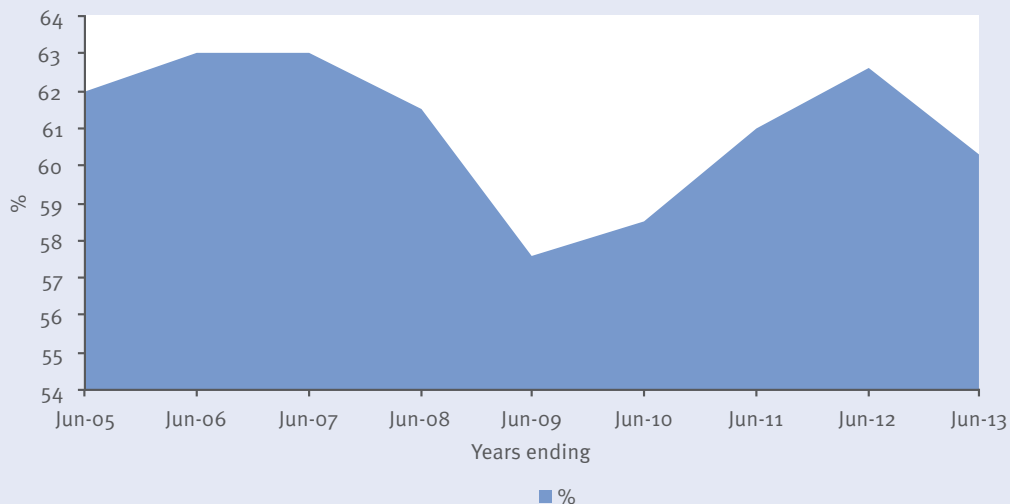
Source: Bureau of Infrastructure, Transport and Regional Economics (2013). Note: major airports are in Brisbane, Gold Coast, Townsville, Sunshine Coast, Cairns (Tropical North Qld), Sydney (NSW), Melbourne (VIC), Adelaide (SA), Perth (WA), Darwin (NT) and Canberra (ACT).

In the year ending June 2013, the number of total inbound passengers on all domestic and international airlines in Queensland was 16.3m. Over the past 8 years, total passenger numbers to Queensland have grown an average 4.1% per annum.

The Gold Coast and Townsville airports have seen higher than average growth rates, with 6.6% and 5.2% per annum respectively. However, Brisbane airport remains Queensland's major airport, with 10.6m passengers in the year ending June 2013.

Hotel occupancy

Room occupancy rates of hotels, motels & serviced apartments with 15+ rooms (quarterly) (%)



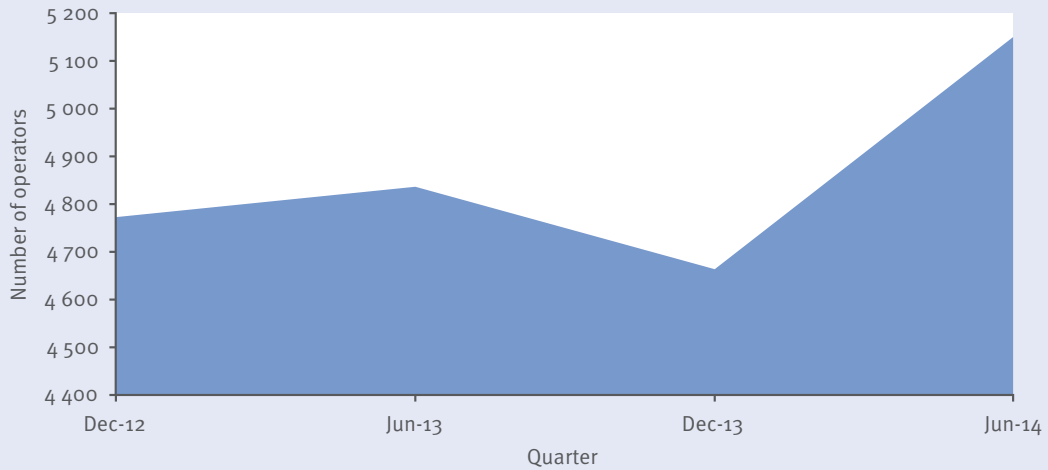
Source: Table generated January 2014 using Survey of Tourist Accommodation, A (years 2000–2013 - latest issue Cat. No. 8635.0) and Survey of Tourist Accommodation - Small Area Data - Queensland, Australian Bureau of Statistics (years 2000–2013 - latest issue Cat. No. 8635.3.55.001).

In the June quarter 2013, the total number of star-graded accommodation establishments in Queensland (hotels, resorts, motels, private hotels, guest houses and serviced apartments) was 1137.

These 1137 establishments had 61 768 rooms available, of which 60% were occupied. Average length of stay was 2.6 nights. Revenue generated from these establishments was \$515.5m (average \$152 per room night occupied).

Digital uptake

There are 5622 Queensland listings on the Australian Tourism Data Warehouse, of these, 2321 are Queensland tourism businesses



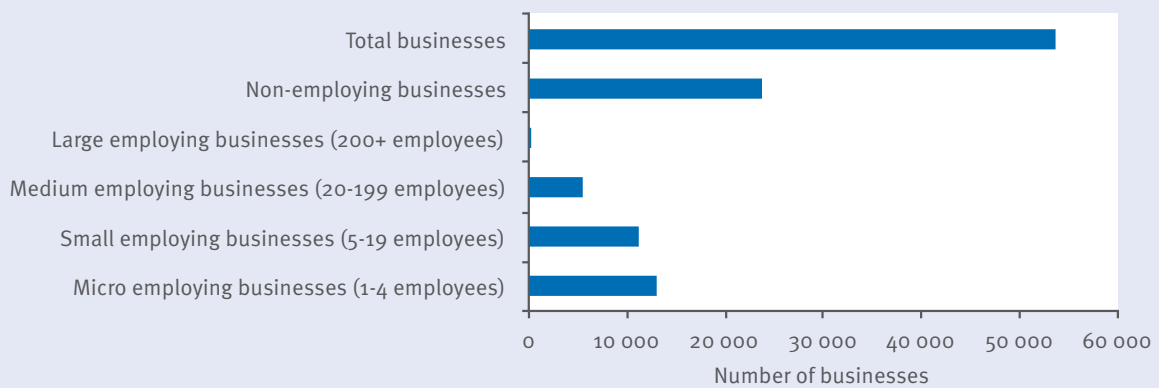
Source: Australian Tourism Data Warehouse (2014).

The number of Queensland tourism products listed on the Australian Tourism Data Warehouse (ATDW) was 5 150 as at June 2014.

This represents an increase of 7.9% from December 2012, and an indicator that an increasing number of Queensland tourism operators are seeing the benefits of the distribution network provided by the ATDW.

Tourism businesses

Number of tourism-related businesses in Queensland



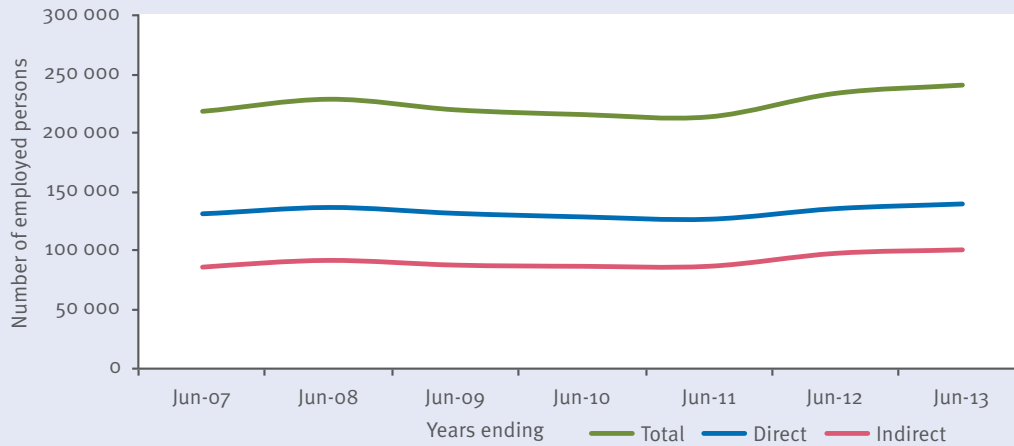
Source: Tourism Businesses in Australia June 2010–June 2012, Tourism Research Australia (2012).

In June 2012, Queensland had 53 647 tourism related businesses representing 12.9% of all registered businesses in the state.

No other sector of the economy has more small businesses, with 9 in 10 tourism businesses employing fewer than 20 persons.

Employment

Direct tourism contribution to employment (year ending) (employed persons)



Source: State Tourism Satellite Accounts 2011–12, Tourism Research Australia (June 2013).

Tourism employed a total of 241 000 Queenslanders in 2012–13, or 10.3% of all people employed in the state. This included 140 000 direct employees or 5.9% of Queensland's total, making tourism a higher direct employer than mining (74 000), and agriculture,

forestry and fishing (66 000). It also indirectly employed 101 000 Queenslanders or 4.3% of the total. Cafes, restaurants and takeaway food services had the largest share of tourism employment (26%), followed by retail trade (18%) and accommodation (13%).



Our industry

State of the Industry 2014



'There is a renewed sense of optimism in the industry and greater confidence showing for tourism investment' – Shane O'Reilly, Chairman, Queensland Tourism Industry Council

The voice of our industry

QTIC has been a key partner in leading, coordinating and supporting activities under *Destination Success*. With its membership, QTIC has committed itself to a partnership approach with government and with all parts of the industry.

As the industry's voice, QTIC has been representing the interests of Queensland's tourism businesses at every opportunity, and has actively engaged in countless issues affecting the industry. The core focus has been to support the directions set out in *Destination Success*. Coordination of the industry's contribution and fostering a spirit of common purpose is critical for successful, sustainable development of the industry and to achieve lasting growth. The greater focus on tourism across all areas of public policy and the well-coordinated and consistent approach to business and destination development has started to show results.

Industry providing leadership under *Destination Success*

QTIC has taken on extensive lead-responsibilities in 31 of the actions in the *Destination Success* 18-month action plan. A further 24 actions list QTIC in a support capacity. The action plan provides a detailed approach to the priorities identified by industry under the six agreed themes of *Destination Success*.

QTIC's investment in delivering these actions on behalf of and for the industry is significant. Many of the actions rely on extensive research and state-wide industry collaboration. Some have long lead-times to be completed and will remain on the agenda well into the next 12 months.

QTIC's actions under *Destination Success* are included under the reports for the *Destination Success* themes: Build Strong Partnerships, Deliver Quality, Great Service and Innovation, and Grow Investment and Access.

QTIC has had thousands of interactions with tourism-related businesses in Queensland over the past 12 months:

- lodged 46 submissions on behalf of the industry, directly influencing key *Destination Success* priority areas such as planning and development; ecotourism; liquor and gaming; industrial relations; the Great Barrier Reef and ports; drive tourism; Indigenous tourism and land management and tenure
- engaged with over 7000 tourism- and hospitality-related businesses in Queensland through direct membership networks and partnership organisations
- facilitated the delivery of 139 000 hours of quality training through registered training organisations throughout Queensland
- been involved in 34 committees, councils and boards of various organisations, representing the interests of Queensland's tourism and hospitality industries
- engaged with industry through leading industry networking events, boardroom lunches, and training and innovation awards
- brokered \$1.85m of funds for training and assessment services for tourism and hospitality workers, and businesses in Queensland.

Other activity has included:

Industry partnerships

The solid membership structures of QTIC, particularly the partnership with the 13 RTOs which nominate two members to the QTIC Board, and QTIC's partnership with 20 sector associations which nominate one member to the QTIC Board, gives the industry an effective collective strength. Industry unity, combined with a multi-portfolio approach to tourism by the government, has allowed an unprecedented partnership model to emerge for the Queensland industry. In partnership with Queensland's RTOs and sector associations, QTIC has delivered many state-wide and regional programs, including the Workforce Futures Program, QTIC Young Professionals Program, Seasonal Workers Program, Tourism Employment Plans, Welcome to Pilot, Chinese Language Program, and the QTIC Prize for Innovation.

Tourism reform roadmap

Perhaps the most challenging action item QTIC is charged with is the Tourism Reform Roadmap. At the first *DestinationQ* forum two fundamental challenges were raised. The first was for the industry to consider the best arrangements that could support efficient, inclusive and comprehensive structures for marketing, industry development and representation. The second challenge was to identify and promote a model of sustainable funding for collective industry purposes. The two issues are interrelated and highly complex, given the regional diversity of Queensland and significant investment in existing structures. Various attempts for substantial reform have been made in the past but have generally failed.



The challenge remains and QTIC is committed to facilitating the process of evolution for industry. QTIC will continue to engage with industry stakeholders to shape an opportunity for tourism to be one of the great and leading industry sectors of this state, an industry with a strong collective business model that can support innovative and competitive businesses.

Advocating for change

Building a better business environment by reducing red tape, improving land tenure and land-use planning, and supporting road infrastructure development remains a critical area for the tourism industry to improve competitiveness and achieve 2020 targets.

Consultation with QTIC's members and other stakeholders revealed that the land tenure environment and landuse planning for tourism businesses, particularly those that rely on access to protected areas, was proving complex, inflexible and costly for operators. A large number of submissions to the parliamentary committees over the past 12 months were followed by QTIC's attendance as a public hearing witness for these matters. With the support of industry, QTIC successfully advocated for reduced development assessment timeframes and potential costs for developers, supported tourism business opportunities on more land zones, gained clarity on the planning and development process, and assisted with legislative reform on the fast-tracking of tourism developments contributing to economic growth. QTIC's strong interest in state land reforms has been recognised and advocacy on such matters will remain a priority for industry.

Improving our road infrastructure along key drive routes is central to the QTIC Drive Alliance committee, established to inform the implementation of the *Queensland Drive Tourism Strategy 2013–2015* and address other Queensland drive tourism issues. The QTIC Drive Alliance is a sub-committee which sits under the QTIC Board and has representation from RTOs, association and industry partners. QTIC has worked with industry to reduce red tape for the caravan sector, including on-site sewage treatment plants, development and approvals processes, matters relating to long-term residential tenancies, halved fees payable for on-site small sewage treatment plants, and streamlined and simplified licensing requirements and facilitated work on the free camping options for local governments.

Our workforce

Tourism in Queensland is a significant employer – directly and indirectly employing 241 000 Queenslanders.

In 2012–13, tourism directly accounted for 140 000 jobs (5.9%) and indirectly accounted for 101 000 jobs. In total tourism accounted for 10.3% of employment in the state. This is substantially more than the mining sector (74 000 direct jobs), and agriculture, forestry and fishing (66 000 direct jobs). Cafes, restaurants and takeaway food services had the largest share of tourism employment (26%), followed by retail trade (18%) and accommodation (13%).

(Source: Tourism Research Australia—State Tourism Satellite Accounts 2012–13, Queensland Government Office of Economic and Statistical Research.)

Unlike most sectors, tourism is represented by many industries classified in the national accounts and in the Australian Bureau of Statistics (ABS) Australian and New Zealand Standard Industrial Classification (ANZSIC). Tourism’s full presence in terms of employment, economic expenditure and business numbers is dispersed over a number of classified sectors. The following table represents the contribution of gross value add, employment and number of businesses in each industry sector that can be attributed to tourism activity.

Profiling our workforce

Labour supply and skills shortages have been identified as potential major challenges to achieving Queensland’s 2020 tourism expenditure growth target and feature prominently in the 18-month action plan. In order to meet the target, better information is needed, including a stronger evidence base to support tourism workforce development.

As demonstrated above, unlike most sectors, tourism is not treated as a discrete industry in the national accounts and the ABS ANZSIC Code classification for data collection. This makes planning for the industry difficult, and while there is a great amount of available workforce data on labour, skills and training, there is a lack of reliable data on employment profiles that are specific to the tourism industry at the state and regional levels. Through the Department of Tourism, Major Events, Small Business and the Commonwealth Games’ (DTEBSB’s) ‘Workforce profile project’, government is building a clearer understanding of the employment characteristics of Queensland’s tourism industry at the whole of state and regional levels.

Tourism contribution by industry sector

Industry sector contribution	Total GVA (\$M)	Employment	Businesses
Accommodation	3 728	17 900	3 217
Holiday rentals	868	NP	NP
Cafes, restaurants and takeaway	3 054	36 600	10 793
Clubs, pubs, taverns and bars	1 214	8 200	1687
Rail transport	279	1 000	6
Taxi transport	233	Total 7 000	3 410
Motor vehicle hire	352		NP
Other road transport	472		NP
Air, water and other	4 321	10 400	1 280
Travel agency and tour operator	902	10 000	1 104
Cultural services	291	2 600	2 494
Casinos and other services	212	1 100	276
Sports and recreation services	510	6 600	2 514
Fuel	174	NP	776
Retail trade	2 256	24 900	27 819
Education and training	636	8 200	NP
All other industries	710	6 000	NP
TOTAL QUEENSLAND	\$20m	140 000	55 688

NP = Not publishable. Source: Tourism Research Australia, State Tourism Satellite Accounts 2012–2013.

Our destinations

State of the Industry 2014



‘Strong partnerships between Government and the State’s Regional Tourism Organisations, alongside the development of strategic Destination Tourism Plans has resulted in clear direction and positive progress to support Tourism as a major pillar of the Queensland economy. Enhanced industry collaboration and collective investment by Government and the private sector will enable Queensland to maintain a competitive advantage. To facilitate this, all parties must remain open to industry reform and new sustainable funding mechanisms to augment the existing Queensland Government’s investment in tourism.’ — Mary Carroll, Chair Queensland RTO Network

Destinations planning for growth to 2020

Destination tourism plans deliver a shared vision for each of our 13 destinations—providing a clear direction for tourism development and identifying opportunities and strategies to create a sustainable and competitive tourism and events industry.

The DTPs build upon government’s *Destination Success: the 20-year Plan for Queensland Tourism* and its key themes: build strong partnerships; preserve our nature and culture; deliver quality, great service and innovation; target a balanced portfolio of markets; offer iconic experiences; and grow investment and access. Over the past 12 months, our RTOs have led development of the DTPs for their respective regions—setting out their destination tourism priorities to 2020.

Each DTP was developed in partnership with the local tourism organisations (LTOs), local government, key regional stakeholders, TEQ, QTIC and key state government agencies.

While the DTPs outline the tasks needed to build regional visitation to collectively achieve our 2020 tourism expenditure growth target, the following regional reports show our RTOs are already focused on the task at hand.

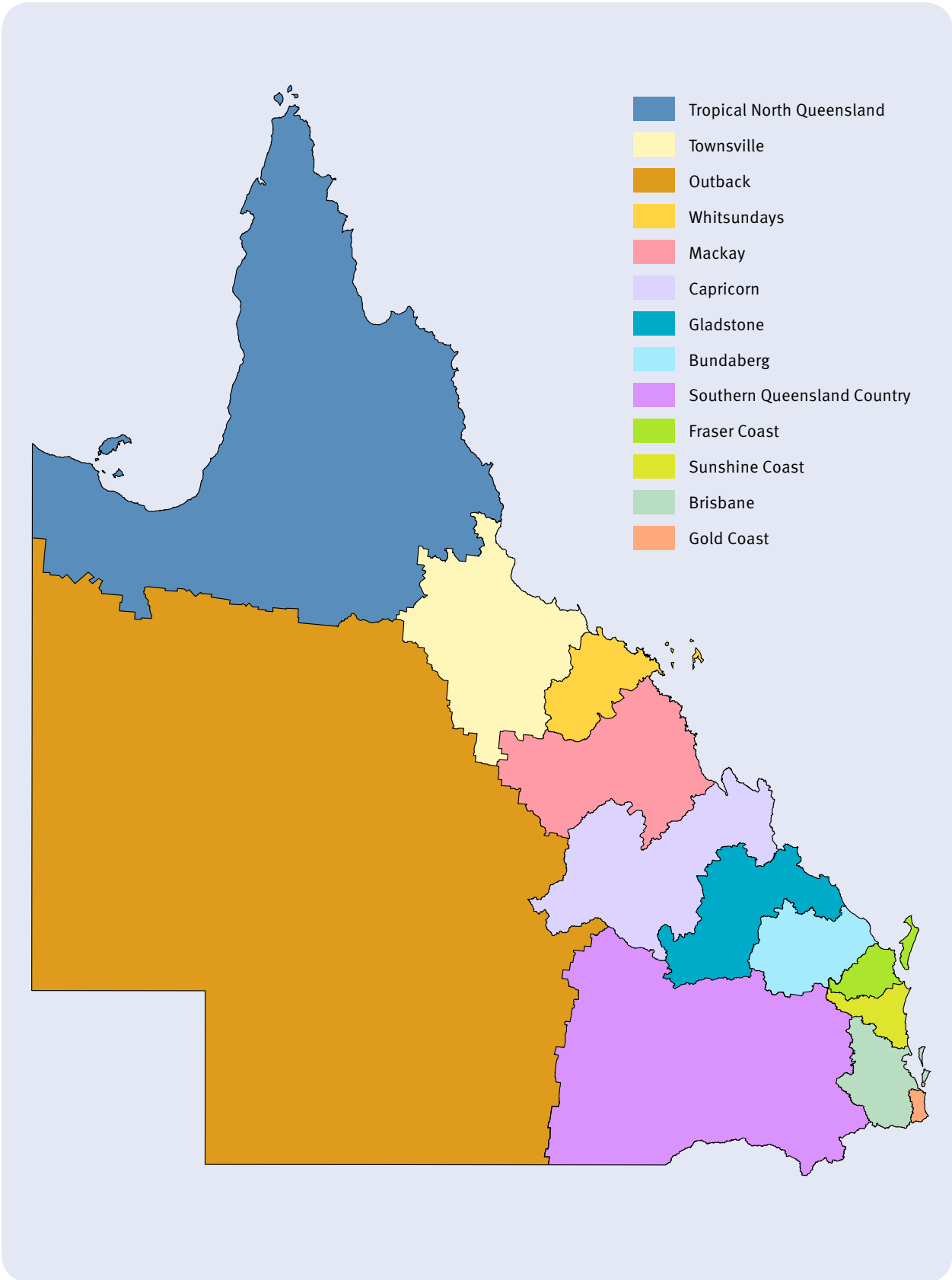
Regional data has been provided by TEQ. Regional Snapshots for all Queensland destinations are available on the TEQ Research website, www.teq.queensland.com. Overview snapshots are also available for both Domestic and International visitors.

In reading the data note:

- **Annual change** refers to the percentage change between the year to the date covered by this report compared to the same period one year prior.
- **Trend change** refers to the percentage change between the average of the three years to the date covered by this report, compared to the average for the same period one year prior.
- **‘n/p’** indicates the data has not been published.

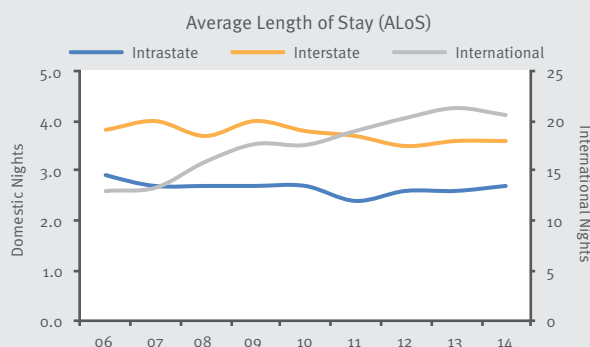
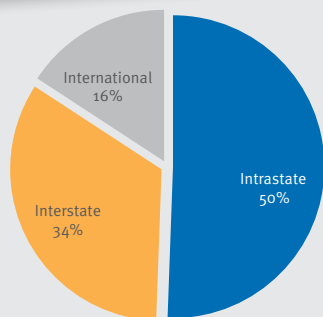


Queensland's 13 tourism destinations



Brisbane

State of the Industry 2014



In 2014 holiday visitation to Brisbane continued to increase, with the intrastate market growing significantly. International holiday, and visiting friends and relatives markets also continued to grow due to strong visitation from China.

Brisbane's tourism landscape will change significantly in the coming years with the announcement of plans for major new infrastructure such as the BaT Tunnel, Queen's Wharf Precinct, Howard Smith Wharves, and the Cultural Precinct master plan.

Brisbane Marketing (BM) launched its 'Give me Brisbane any day' campaign, encouraging locals and visitors to be advocates for the region's attractions by sharing their holiday experiences online. This was the first unified marketing campaign for the Greater Brisbane area, which covers Brisbane City and seven other local government areas. Funding for the campaign was provided by the RTO Contestable Grants Funding Scheme, eight councils and industry. BM and TEQ also executed two Give Me Brisbane Any Day campaigns in the interstate markets, in February and June 2014, in addition to two campaign activations in New Zealand.

Major events continue to drive increased visitation to Brisbane. The 'Brisbane Weekends' strategy was launched to promote Brisbane's 2014 events calendar and encourage visitors from Queensland and northern New South Wales. Cultural organisations, event partners and major sporting bodies were the catalyst to drive visitation to Brisbane, particularly during traditional low-season and low-occupancy periods. Successful events included the Brisbane International Tennis Tournament and the Bolshoi Ballet at the Queensland Performing Arts Centre (QPAC).

Brisbane's China Partnership Strategy rolled into its second year with continued development work being delivered through: engagement with inbound tour operators and partnership strategies, industry development programs, an in-market online consumer campaign and resultant famil, and a partnership with GOMA's blockbuster Cai Guo-Qiang exhibition: *Falling back to Earth*.

The second edition of the *Guide to Hotel Investment in Brisbane, Australia* was launched at a 'Tourism outlook' breakfast in April, hosted by the Property Council of Australia. The bilingual guide, which targets prospective investors, developers, operators and financiers, aims to attract more hotel investment in Brisbane by providing information on market fundamentals and presenting a business case. The guide enables BM and DTESB to strategically engage with the domestic and international investment industry. At the launch, the Lord Mayor Graham Quirk and Minister Jann Stuckey MP reported that while the guide was showing early signs of success, Brisbane continues to forgo 278 000 room nights and 121 000 visitors, equating to \$140m in lost visitor expenditure from the undersupply of hotel rooms.

Another key focus for Brisbane is the G20 Leaders Summit being held in November 2014. A 'Brisbane welcomes the world' program has been launched in advance of the summit and a high volume of international media famils have already been undertaken with many more expected. This media attention will also be leveraged for the Brisbane Global Café which will create an epicentre of global thought leadership, including a focus on the future of tourism.

	Visitors	Expenditure (\$m)
Domestic Overnight	5 156 000	\$3214.5m
Annual % change	▲ 1.0%	▼ -1.7%
Trend % change	▼ -0.1%	▲ 4.7%
International Overnight	967 000	\$1515.3m
Annual % change	▼ -1.5%	▼ -5.4
Trend % change	▲ 1.4%	▲ 1.5
TOTAL	6 123 000	\$4729.8m
Annual change	▲ 0.6%	▼ -3.0%

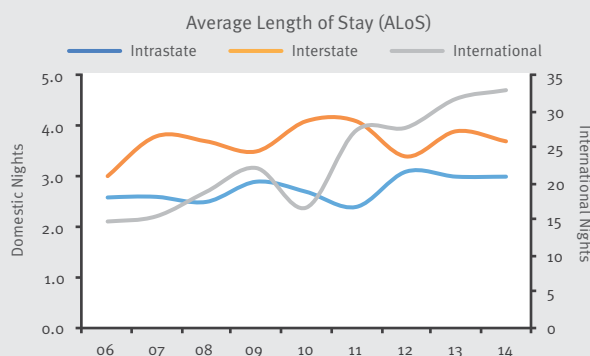
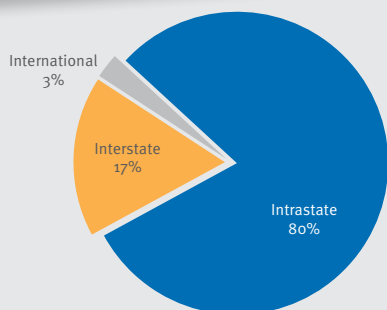
BM's Convention Bureau has exceeded its \$60m target of bid wins in Brisbane for the 2013–14 financial year. These bid wins represent over 110 000 room nights generated through national and international conferences, many secured in partnership with the Brisbane Convention and Exhibition Centre.

BM also partnered with TEQ to deliver industry development workshops such as digital masterclasses, international ready mentoring, China ready mentoring and an events boot camp. In addition, hero experience workshops for local government association partners and tourism industry operators were conducted to identify local hero themes and signature experiences that complement regional hero experiences.



Southern Queensland Country

State of the Industry 2014



While holiday visitation to Southern Queensland Country remained relatively stable, there was a downturn in the ‘visiting friends and relatives’ market. Strong growth continued in the business market, created mainly by the resources sector. While Brisbane is the primary domestic market for the region, connectors and social fun seekers are likely to now become key domestic markets. The new Brisbane West Airport at Toowoomba due to open in October 2014 provides opportunity for increased interstate travel; and New Zealand continues to be important for the international visitor market. However, focus is on the opportunities being created by Singapore and Indonesia, with significant collaboration needed to raise the quality and depth of visitor experiences.

During the past 12 months, Southern Queensland Country Tourism (SQCT) has focused on the following strategic priorities:

- developing new hero experiences and strengthen existing ones to attract new visitors and increase their expenditure
- growing overnight visitor expenditure by 5% each year
- enhancing positioning of the region as a destination that delivers on its brand promise: ‘Slow down, breathe deep and enjoy a taste of life in the country’
- building a strong, unified industry that works collaboratively to achieve sustainable growth
- using tourism to strengthen the region’s commitment to safeguarding and celebrating its cultural and natural heritage.

SQCT, TEQ and local industry collaborated to host the region’s largest marketing activation—‘Autumn on James’. The three-day event, which was held at James Street in Brisbane, showcased the regional flavours that Southern Queensland Country is renowned for, in order to tempt city-dwellers to visit Queensland’s premier country destination. The integrated marketing campaign for the event featured television, print, outdoor and digital advertising, and generated comprehensive publicity. SQCT also partnered with influential, Brisbane-based lifestyle journal *The Good Guide* to produce a customised Southern Queensland Country edition. Up to 30 000 copies of this special edition were distributed throughout Brisbane’s Central Business District (CBD) and inner city suburbs.

From March to the end of June, a Western Country campaign was implemented, targeting connectors in the long-haul drive market. It featured both print and digital activity, and generated over 1m impressions and 1586 clicks.

The ‘Southern Queensland Country Club’ is a three-year strategy using a digital communication platform to create relationships with primary and secondary markets. In its first year, the project attracted more than 32 000 subscribers, exceeding its target by more than 20 000 subscribers.

An extensive program of industry development initiatives was delivered in the region, including Yield Management Workshops, the International Ready Mentoring Program, Hero Experiences Mentoring Program and the Digital Ready Program.

	Visitors	Expenditure (\$m)
Domestic Overnight	1 778 000	\$744.4m
Annual % change	▼ -2.8%	▲ 11.2%
Trend % change	▲ 4.4%	▲ 16.0%
International Overnight	48 000	\$61.1m
Annual % change	▲ 1.1%	▼ -7.7%
Trend % change	▲ 0.7%	▲ n/p
TOTAL	1 826 000	\$805.5m
Annual change	▼ -2.7%	▲ 9.5%

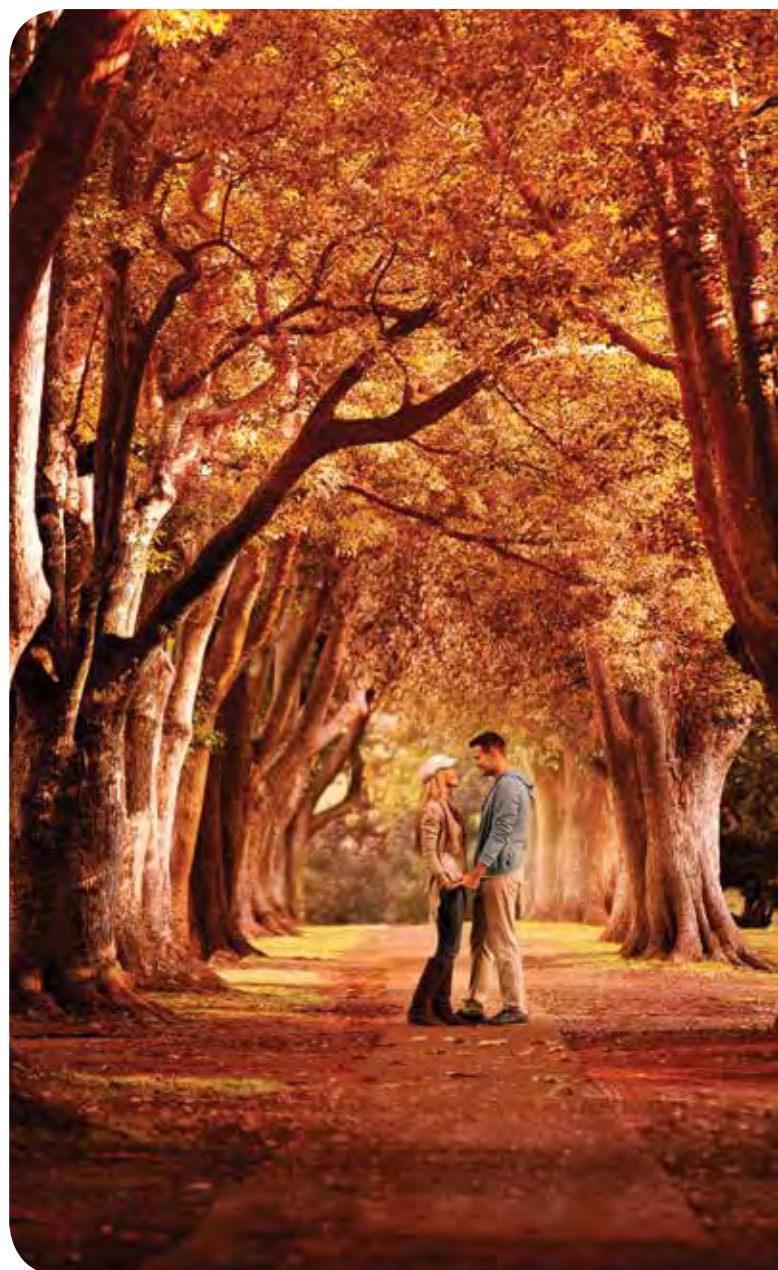
For example, in May SQCT and TEQ hosted an events boot camp, giving local event organisers an opportunity to hear from experts in grant writing, sponsorships, events and social media, and engage with local government representatives about support and promotion of their events.

For the second year running, SQCT and TEQ also delivered a product development roadshow showcasing Daylesford and the Macedon Ranges of Victoria. The roadshow provided local tourism operators an opportunity to learn from, and be inspired by, similar products in competitor destinations.

As part of the Southern Queensland Country Digital Ready Program, local operators were invited to participate in a 'Maximise your online investment in marketing campaigns' workshop. Participants were given tips on optimising their investment in marketing campaigns, writing compelling campaign advertisements, converting potential bookings into actual bookings and measuring campaign effectiveness. This workshop led to a measurable increase in industry participation.

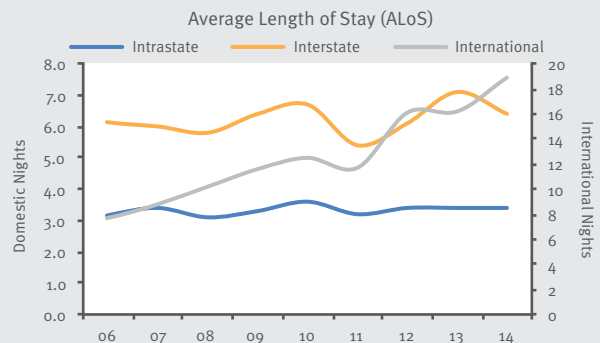
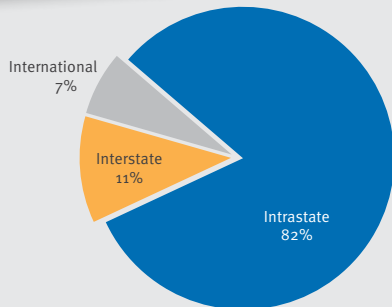
Other activity in the region that has been led by SQCT includes:

- facilitating industry engagement through hosting the Southern Queensland Tourism Industry Conference
- successful uptake by regional councils of the SQCT branding as reflected by the growing suite of destination guides including South Burnett, Bunya Mountains, and Warwick and surrounds
- representation by SQCT at consumer travel shows nationally.
- Facilitation of a series of 'think tanks' to discuss and inform the development of the Southern Queensland Country DTP.



Bundaberg North Burnett

State of the Industry 2014



Over the past three years, the Bundaberg North Burnett region experienced two major natural disasters that affected infrastructure and visitation. However, the region rebounded well with an influx of visitors during the Christmas, New Year and Easter holidays, and a significant increase in the average length of stay. Travel for the purpose of visiting friends and relatives also increased visitation to the region.

Bundaberg's positioning as a regional leisure centre continues to play a significant and increasing role in attracting day trippers and overnight visitors, and the brand name 'Bundaberg' continues to attract visitors. The destination's key drawcards include the world-class Mon Repos Turtle Rookery and the nearby Great Barrier Reef, which establish Bundaberg as Australia's most accessible destination for observing nesting sea turtles and as the southern gateway to the reef. As the global reputation of the Mon Repos Turtle Rookery continues to grow, the opportunity to witness turtles nesting and hatching is making overnight and extended stays in the region a must for both domestic and international visitors. Bundaberg's 2013-14 marine turtle nesting season was highly successful, attracting 28 483 visitors to the Mon Repos Conservation Park. This was supported by a joint campaign between Bundaberg North Burnett Tourism (BNBT), TEQ and industry promoting Queensland's signature natural experience of turtles at Mon Repos.

The drive market is a core business representing the majority of visitors to the region. It consists of families travelling from South-East Queensland and Central Queensland, as well as Grey Nomads and Baby Boomers from Australia's southern states who head north during the colder months. BNBT has developed a fully integrated, digital information system for the region, comprising a destination website, mobile website, new travel applications for tablets and smartphones, and a

network of strategically located, state-of-the-art, touch screen kiosks. The system aims to engage visitors and connect them during pre-planning, en-route, on arrival and while travelling throughout the region.

The international drive market is an area of focus with visitation from Europe, Singapore, Malaysia and New Zealand. International visitation is being boosted by work opportunities, such as fruit and vegetable picking, for working holiday-makers in the region.

Sporting and cultural events are also driving visitation, as the region has excellent facilities to cater for state, regional and local events.

While the region's coastal towns and highway communities of Childers, Bundaberg, Bargara and Woodgate have a particularly strong economic reliance on tourism, the entire region is focused on tourism development, as it provides significant opportunities and benefits for all its communities.

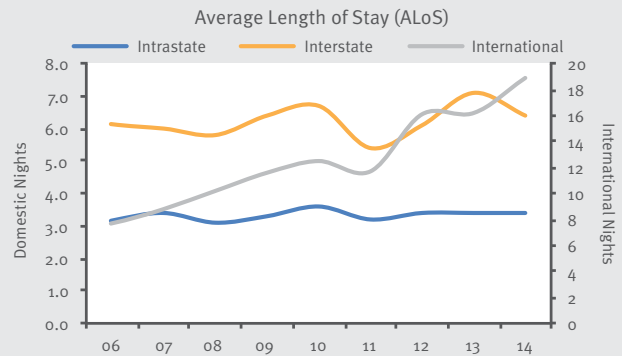
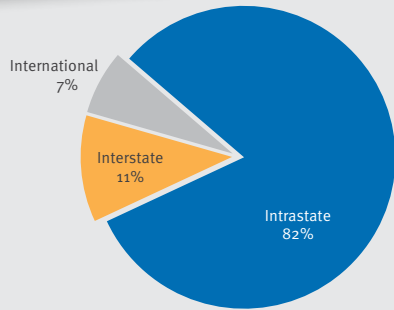
	Visitors	Expenditure (\$m)
Domestic Overnight	1 670 000	\$930.8m
Annual % change	▼ -2.4%	▼ -8.5%
Trend % change	▲ 1.3%	▲ 5.8%
International Overnight	123 000	\$81.5m
Annual % change	▼ -7.9%	● 0.0%
Trend % change	▼ -3.1%	▲ 7.2%
TOTAL	1 793 000	\$1012.3m
Annual change	▼ -2.8%	▼ -0.5%

The above visitor data for Southern Great Barrier Reef covers the three destinations of Bundaberg, Gladstone and Capricorn.



Capricorn

State of the Industry 2014



The Capricorn region stretches from the Central Highlands to the Keppel Islands. It boasts the iconic natural attractions of Great Keppel Island, the southern Great Barrier Reef, Carnarvon Gorge, Sapphire Gemfields, Capricorn caves, Blackdown Tableland and Byfield National and State parks. The Capricorn region incorporates the major towns of Yeppoon, Rockhampton and Emerald.

Existing tourism product continues to be upgraded with the addition of an outdoor movie theatre, animal petting area for children and a waterslide at Big4 Capricorn Palms Holiday Village. Other upgrades include the opening of a \$3.5m waterslide at the refurbished Cool Waters Holiday Village and the multi-million dollar upgrade of Great Keppel Island Hideaway—which was officially opened in July 2013 as an affordable, 300-bed island resort.

Accommodation stock has increased in the region. A total of more than 200 new rooms have become available in the region during the past 18 months, due to Quest in Rockhampton, Oshen in Yeppoon and Dooleys in Springsure. There will also be an additional 100 rooms at Empire in Rockhampton by the end of 2014. In May 2014, construction began on Salt, which is a 50-room beachfront complex in Yeppoon due for estimated completion in August 2015.

A Great Keppel Island Revitalisation Plan was approved in 2013, which will see the first Great Barrier Reef island resort to be constructed in 25 years. In August 2013, the Queensland Government offered long-term tenure to Sydney-based Tower Holdings, who teamed up with foreign investment partner, JLL and Moelis & Co. (a New York Investment bank), to deliver a \$600m project.

The plan involves development of a 250-room resort set among 575 hectares of environmental protection area, featuring eco-villas, apartments and conference rooms, and a day spa, golf course, marina and upgraded airstrip. Greg Norman—a famous Australian professional golfer—will be the ‘face’ of the resort.

In December 2013, the Coordinator-General declared the \$600m Capricorn Integrated Resort in Yeppoon, ‘a coordinated project’. Capricorn Integrated Resort will be a 300-room, five-star resort with a golf course, air strip and a residential community of 8000 dwellings.

The Southern Great Barrier Reef partnership between the Capricorn, Gladstone and Bundaberg regions, TEQ and regional operators continues to gain strength and momentum and increase exposure to the region through the annual campaign, ‘Where great begins’.

‘Dig the tropic geo-tourism trail’, an initiative of Capricorn Enterprise, Central Highlands Regional Council and Outback Tourism, is a successful multimedia campaign funded through the RTO Contestable Grants Funding Scheme. Other campaigns in the region include the ‘Summer of Capricorn’ and the Easter campaign which showcased the talents of local singer and songwriter Kate Leahy.

In March 2014, a comprehensive tourism blueprint was released for the Capricorn region, outlining immediate, medium- and long-term activities. One of the major road infrastructure projects identified in the DTP has been successful. In April 2014, the Deputy Premier announced \$15m would be spent funding 50% of the Panorama Drive construction at Pacific Heights in Yeppoon. Panorama Drive will provide an alternative travel route between the northern suburbs and coastal road—which has been frequently impacted by storms.

	Visitors	Expenditure (\$m)
Domestic Overnight	1 670 000	\$930.8m
Annual % change	▼ -2.4%	▼ -8.5%
Trend % change	▲ 1.3%	▲ 5.8%
International Overnight	123 000	\$81.5m
Annual % change	▼ -7.9%	● 0.0%
Trend % change	▼ -3.1%	▲ 7.2%
TOTAL	1 793 000	\$1012.3m
Annual change	▼ -2.8%	▼ -0.5%

The above visitor data for Southern Great Barrier Reef covers the three destinations of Bundaberg, Gladstone and Capricorn.

In early February 2014, for example, Tropical Cyclone Oswald caused major beach erosion along the Capricorn Coast and on Great Keppel Island.

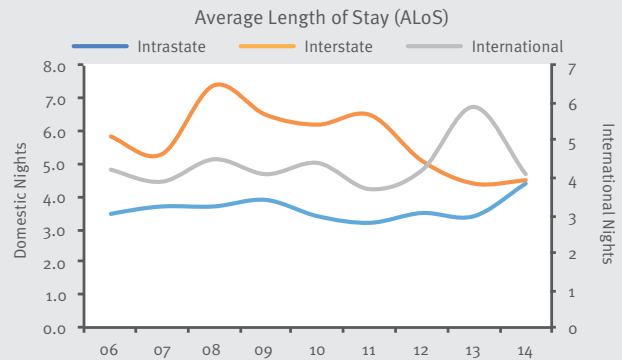
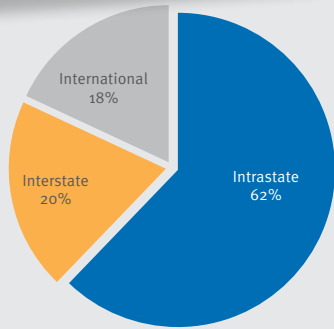
Successful product development in the trade distribution network has resulted in operators using more third-party, online booking systems. Trade mentoring programs, digital mentoring programs, and yield management and experience development workshops have also been extremely helpful for operators wanting to increase their bookings and profit.

The National Caravan Rally is a ten-day event held triennially in Australia. Each state and the Australian Capital Territory are given turns to host the event. The 15th National Caravan Rally was held in Rockhampton from 24 September to 2 October 2013, and was hosted by the Combined Caravan Clubs of Queensland (CCCQ). This is the first time the rally has been held in Queensland. The Queensland Government contributed a \$20 000 grant for the event. Over 1200 people attended the rally in approximately 700 vans. Capricorn Enterprise sold \$80 000 worth of group tours and coordinated all group tours for the rally. The event is estimated to have generated an economic benefit of approximately \$561 000 for the region.



Fraser Coast

State of the Industry 2014



Over the past two years, the Fraser Coast has experienced a decrease in its domestic visitor market. Although the intrastate market has been decreasing, the interstate market has been significantly increasing. A key priority of the Fraser Coast DTP is to increase its interstate marketing efforts, with a particular focus on Sydney and Melbourne, while still maintaining and increasing intrastate activity.

The Fraser Coast has also seen significant decline in its international visitor market over the past five years, but is now experiencing a return to some growth. To facilitate continued growth, Fraser Coast Opportunities (FCO) has partnered with Sunshine Coast Destination Ltd and local tourism operators to implement Australia’s ‘Nature Coast International Product Building’ initiative, which focuses on both traditional international markets and new and emerging markets.

During the past year, FCO has emerged as a reinvigorated RTO for the Fraser Coast region. It has been involved in marketing, tourism, events and investment attraction—functions that were previously performed by Fraser Coast Regional Council. As a result, FCO has increased its staff, funding and resources.

Whale-watching tour numbers have been declining for the past five years. The Fraser Coast has also lost considerable market share to Rainbow Beach. In response, FCO has worked in partnership with TEQ and Industry to differentiate and enhance existing and new tourism product and experiences, as well as initiating reinvigorated marketing effort in both traditional and new market segments.

A ‘swim with whales’ trial period is being implemented, along with a new marketing campaign showcasing the high-quality personal natural encounters with whales guaranteed only in Hervey Bay. Recreational fishing has also been identified as a key opportunity. Fraser Coast Opportunities recently announced that the Fraser Coast will host the made-for-television Australian Fishing Championships (AFC) series for the next three years, which will be broadcast nationally and internationally. As well, it will host several Australian Bass Tournament (ABT) qualifying event rounds annually and the inaugural Asian Fishing Championships series.

To help boost the region’s tourism offering, FCO has been working with local tourism operators and the Queensland Government to reduce red tape and increase access to national parks. Access regulations have been relaxed for the west coast of Fraser Island, enabling whale-watching tour operators to operate throughout the whole year, not just during whale season.

FCO is now delivering ten significant events each year in the region for the very first time and providing support services to community and sporting event organisers. Specifically, FCO is working with TEQ and the Queensland Government to deliver a series of high-quality, high-yielding events that benefit the local tourism industry through increased expenditure and length of stay. These events will play a significant role in helping the region reach its 2020 target.

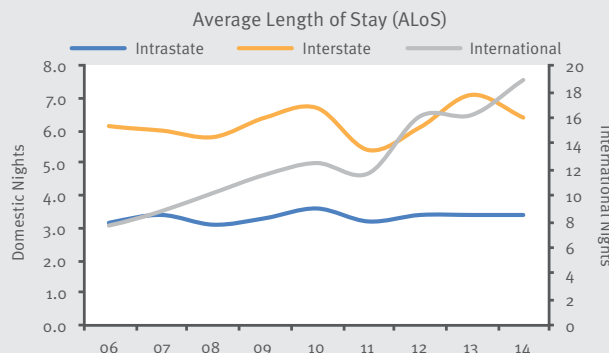
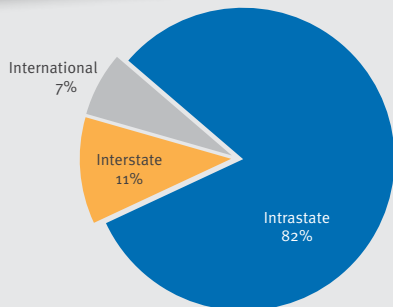
	Visitors	Expenditure (\$m)
Domestic Overnight	531 000	\$294.2m
Annual % change	▼ -2.7%	▼ -9.9%
Trend % change	▲ 2.9%	● 0.0%
International Overnight	117 000	\$38.5m
Annual % change	▼ -1.5%	▲ 11.1%
Trend % change	▼ -8.3%	▼ -21.3%
TOTAL	648 000	\$332.7m
Annual change	▼ -2.5%	▼ -7.9%

Over the past five years the region has struggled to develop accessibility through increased aviation routes, and to encourage investment in key projects such as the Urangan Boat Harbour precinct. With FCO's additional investment attraction resources, it is now in a stronger position than ever before to pursue these opportunities. FCO has worked with QantasLink and Fraser Coast Regional Council to increase the number of flights between Brisbane and Hervey Bay, and introduce direct flights from Sydney to Hervey Bay. FCO also acts as the 'link player', facilitating collaboration between key regional business leaders and council to advance the 'game-changing' Urangan Boat Harbour Precinct project.



Gladstone

State of the Industry 2014



GAPDL has increasingly focused on Grey Nomads, Visiting Friends and Relatives (VFR) and the travelling visitor market. This includes encouraging travellers to divert from the highway to Gladstone, Agnes Water, 1770 or Banana Shire, by using interpretive signage at key points along the Bruce Highway and at local attractions such as Lake Awoonga. An additional tool to encourage travellers to visit ‘off the highway’ destinations in the region is the ‘Mobile I’ project, which was delivered in partnership with one of Gladstone’s liquefied natural gas (LNG) projects, QGC. Off the highway destinations in the region include the towns of 1770 and Agnes Water, Boyne Island, Tannum Sands, Gladstone City and rural hinterland destinations such as the Boyne Valley and Banana Shire. Gladstone Area Promotion Development Limited now has the ability to take information services to visitors, which has been a positive and constructive addition to its existing services.

Over the past two years, GAPDL has been working hard to attract visitors to Kroombit Tops National Park by developing basic public amenities, enhanced road access, 4WD guides and travelling routes.

Significant resources have been allocated to the Southern Great Barrier Reef (SGBR) partnership to target the domestic and New Zealand markets, and to increase SGBR brand recognition, and the Gladstone Region and Banana Shire’s market share to position the region as a viable alternative to other Queensland destinations for local, national and international travellers.

The Gladstone region boasts 14 largely pristine and undeveloped national parks. It offers a unique and diverse range of national park experiences, from unspoiled coastline through to lush hinterland gorges and rugged mountain ranges. This untapped market has enormous potential to generate tourism in the region.

Adverse weather events over the past few years have impacted tourism due to negative media coverage and ongoing road repairs. Many travellers believe that Queensland’s entire east coast was underwater and that it continues to experience ongoing adverse weather events. Gladstone Area Promotion Development Limited has been trying to change this perception, but it has been challenging. Additionally, the unexpected closure of Heron Island from 23 December 2013 to early February 2014 due to a facility fire further negatively impacted the region’s visitation during this important holiday period.

Gladstone Regional Council invested heavily in redeveloping the Gladstone Entertainment Centre, which has since emerged as a world-class entertainment and conference venue, with the capacity to host major events, concerts, conferences and expos. The centre’s evolution has enabled Gladstone to host major events and has positioned the city at the forefront of an emerging events market. Development of new accommodation in the region has also boosted the events industry in Gladstone.

GAPDL and tourism operators are working together to develop new products and marketing initiatives, and provide a higher level of customer service. They aim to meet the changing needs of visitors and the changing tourism market, as many accommodation providers transition off long-term contracts to diversify their offering and target market.

GAPDL worked closely with stakeholders from throughout the Gladstone Region and Banana Shire to develop a Gladstone Region– Banana Shire DTP which was released in July 2014 and has been well received by operators and industry stakeholders—it is readily available on GAPDL’s website.

	Visitors	Expenditure (\$m)
Domestic Overnight	1 670 000	\$930.8m
Annual % change	▼ -2.4%	▼ -8.5%
Trend % change	▲ 1.3%	▲ 5.8%
International Overnight	123 000	\$81.5m
Annual % change	▼ -7.9%	● 0.0%
Trend % change	▼ -3.1%	▲ 7.2%
TOTAL	1 793 000	\$1012.3m
Annual change	▼ -2.8%	▼ -0.5%

The above visitor data for Southern Great Barrier Reef covers the three destinations of Bundaberg, Gladstone and Capricorn.

GAPDL is also diversifying the region's hero experiences and attractions. In 2014, it began working with Benaraby Motorsportz Complex Inc. and the local motorsport fraternity to develop the high-profile Benaraby Motorsports Complex. This will position the region as the premier Central Queensland destination for recreational motorsports, driver education and events and competitions that meet state, national and international standards.

Banana Shire Council has been working with GAPDL to enhance existing attractions and develop new offerings within the Banana Shire that highlight the region's unique experiences and promote its proximity to the SGBR. The Gladstone Region and Banana Shire has been actively promoted at various regional and interstate events, such as caravan, camping and 4x4 shows, Brisbane Tinnie and Tackle Show, Agnes Water Captain Cook 1770 Festival, Callide Valley Show, Ecofest and Gladstone Multicultural Festival. Under the SGBR brand, Gladstone, in partnership with Capricorn Enterprise and BNBT, attended the Australian Tourism Exchange (ATE), and numerous famils, including a pre-ATE famils which featured many of the unique and spectacularly beautiful areas of the Gladstone Region.

During the past three years, Gladstone's regional landscape has changed significantly as the coal seam gas industry hired 12 000 staff to construct three liquefied natural gas plants on Curtis Island. A strong focus has therefore been on engaging these new residents with harbour and industry tours and events like 'Celebrate the Sea'—a family fun day attracting more than 12 000 people to Gladstone Marina parklands.

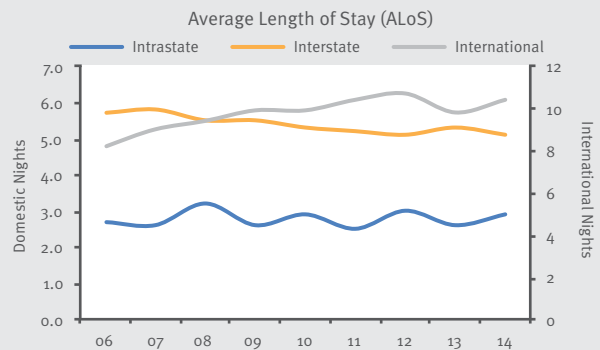
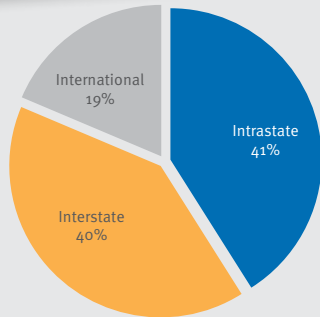
The future is bright for the Gladstone Region; November 2014 will see the revival of the Gladstone Seafood Festival—the Gladstone region has long had a reputation as producing some of Queensland's finest fresh seafood and GAPDL is working hard to ensure continued positive growth in this important sector.

GAPDL is bringing in a new era in positive promotion of the Gladstone Region / Banana Shire with collaborative engagement from tourism operators, business, government and major industry ensuring continued strong growth across the important tourism sector in this unique and diverse part of Queensland with strong potential for attracting diversity of tourism services and experiences.



Gold Coast

State of the Industry 2014



Gold Coast Tourism (GCT) delivered 20 domestic destination marketing campaigns in 2013 that helped generate consumer demand and attract visitors to the Gold Coast. These campaigns contributed an additional \$135m in total visitor expenditure in markets where the campaigns were most active. This improvement raised confidence in the industry, resulting in increased engagement and investment in market activity and product development. Completion of the G:link light rail and major upgrades to the Pacific Fair Shopping Centre and Jupiter’s Hotel and Casino have been drawcards to the region.

Over the past 12 months, direct air access to the Gold Coast through Scoot Airlines and AirAsia X has increased visitation from Singapore and Malaysia. Since the introduction of AirAsia X in 2007, visitors from Malaysia increased by 89% to more than 28 000 visitors, while visitor nights increased by 13% to 160 000 nights—worth approximately \$18m in direct visitor expenditure in 2013. Similarly, since the introduction of Scoot Airlines in 2012, visitors from Singapore increased by 95% to 40 000 visitors, while visitor nights increased by 136% to 222 000 nights—worth an estimated \$26m in direct visitor expenditure in 2013. These figures indicate that direct air access from key source markets not only delivers a one-off boost but also a long-term, sustained benefit. In 2014–15, GCT will work with a number of new aviation partners, particularly carriers from China and South-East Asia, to secure new routes for major international markets.

The GCT China Consumer Direct Strategy has generated increased visitation and created unrivalled awareness and engagement in Tier 1 and Tier 2 markets. Between 2010 and 2013, visitors from China increased by 63% to 186 725 people, while visitor nights increased by 58% to 977 514 nights.

The Chinese visitor market is now worth an estimated \$113m in direct visitor expenditure. The VisitGoldCoast.com website continues to attract up to 275 000 unique visitors each month and the VisitGoldCoast Sina Weibo profile is the most popular non-Chinese destination profile on the social network, with approximately 575 000 highly-engaged followers. In 2014–15, GCT will continue its presence in China and will more closely align with industry under the City China Plan highlighted in the Gold Coast DTP.

GCT is committed to being an industry leader in the use of digital technologies to increase destination awareness, engagement and conversion. In 2013, traffic to GCT’s leisure website, VisitGoldCoast.com, increased by 98% to 110 000 unique visitors per month. An average of 3.5 million pages of regional content is published each year, making it the third highest performing destination website in Australia. The VisitGoldCoast app for smartphones and tablets continues to meet the needs of the mobile and multi-device travel consumer, with 70 000 downloads since its launch in July 2013. These two digital channels alone have generated more than 200 000 consumer leads for Gold Coast tourism operators in the financial year to date, which is worth an estimated \$2.4m in converted sales. In 2013, the VisitGoldCoast Facebook page also grew by 130% to 570 000 followers, making it Australia’s third most popular destination profile, behind Sydney.com and VisitQueensland. Throughout 2014–15 GCT will continue using these digital technologies.

Business events are the highest yielding segment of the region’s visitor markets, with an average expenditure of \$554 per day—more than five times the spend of an average leisure visitor. In 2013, the Gold Coast attracted 964 000 business visitors, which was up 15% or 122 000 business visitors compared to the previous year. The number of business events in the city also increased by 28% to 1 584 events.

	Visitors	Expenditure (\$m)
Domestic Overnight	3 536 000	\$3194.3m
Annual % change	▼ -3.5%	▲ 2.9%
Trend % change	▲ 1.7%	▲ 6.1%
International Overnight	810 000	\$968.9m
Annual % change	▲ 5.5%	▲ 13.4%
Trend % change	▲ 2.8%	▲ 6.0%
TOTAL	4 346 000	\$4163.2m
Annual change	▼ -1.9%	▲ 5.2%

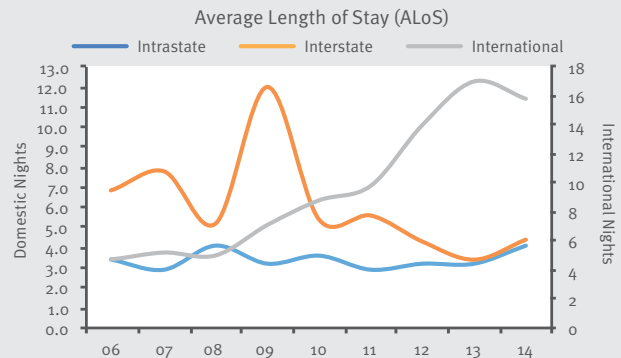
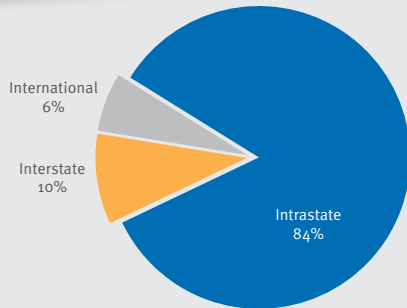
This increased share of the business events market demonstrates the destination's successful positioning, conversion and yield in that space. The Gold Coast secured a 42% share of Queensland's entire business event delegate market, which is an increase of 6% on the previous year. In the half-year reporting period from July to December 2013, GCT won 44% of business event bids it competed for and those events are expected to deliver more than \$20m.

A 'Theme Park Capital' campaign raised unprecedented awareness of the region's theme park offerings in key domestic source markets. The Theme Park Capital campaign will be a contributing factor for the increased overnight visitor expenditure witnessed on the Gold Coast in the 12 months to June 2014. The campaign has also contributed to an increase in visitation to the Gold Coast's individual theme parks (compared to previous corresponding periods). This has been particularly evident for the smaller parks. The campaign's greatest success has been in the consumer awareness which was achieved. Given the awareness raised, it is anticipated the campaign will continue to influence consumer decisions for some time.



Mackay

State of the Industry 2014



While visitor expenditure softened in the Mackay region over the past 12 months, it is expected to improve over the next 12 to 18 months. In light of this expected upturn, the tourism industry is striving for a 2020 target of \$563m, which is \$100m above its current target. In 2013, tourism revenue reached \$451m, then began to decline. While this volatility was largely caused by reduced construction-related travel due to the resource sector transitioning from construction to production, the transition is expected to result in new investment in the resources sector and an increase in leisure tourism opportunities.

Business travel has always been strong for the region, so a large focus has been on increasing leisure travel to balance the portfolio. Leisure travel was encouraged through a series of campaigns targeting the visiting friends and relatives segment, and camping tourers and active travellers. Regional Queensland continues to be the mainstay market for the region as it is where most of the traditional types of travellers come from, including those travelling to visit friends and relatives or travelling for business. However, new markets are also being targeted interstate.

The Mackay region is renowned for wildlife and nature experiences such as platypus spotting in the wild and wallaby spotting on the beach. This makes it a popular destination and keeps international visitation stable. A new brand has been created to promote awareness of the region's natural attractions and emotionally target travellers who seek unspoilt natural experiences.

As the region is a destination of choice for explorers and discoverers, the new brand will capitalise on those audiences to increase visitation.

In 2014, focus for the region has been on:

- packaging experiences to provide a compelling proposition
 - Workshop and networking events were held to encourage operators to package the diverse experiences the region has to offer.
 - The *Mackay Region and Whitsundays Visitor Guide* is scheduled for release in September 2014. It will be the first combined visitor guide in decades and will demonstrate the benefits of collaboration between neighbouring tourism regions.
- helping operators generate revenue during traditionally non-peak periods
 - An issue facing tropical and outback tourism destinations is the inevitable lull during summer. Workshops have been targeted towards tourism businesses to help them increase visitation in non-peak periods.
- growing awareness of the destination interstate
 - An expo stand was hosted at various camping and outdoor shows on Australia's east coast to give drive markets (caravan and camping travellers) an understanding of the travel products available in the region.
- helping tourism businesses with low- and no-cost methods of marketing and advertising to grow the destination's profile
 - Tourism operators attended social media and DIY marketing workshops and were given free marketing advice. They were also offered free involvement in social media initiatives.
- renewing the focus on business and leisure events
 - Business event products were audited to better target the business events sector. The new Mackay region branding will be adapted for business events to help local event organisers generate more bookings.

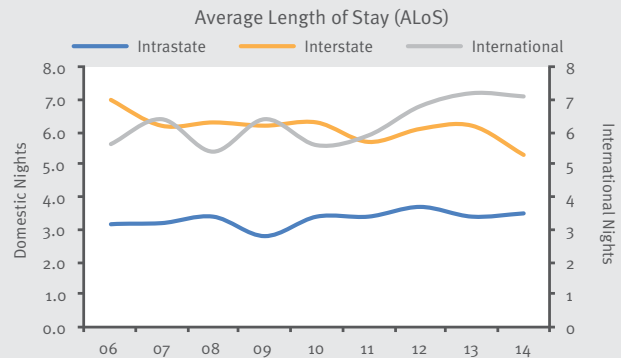
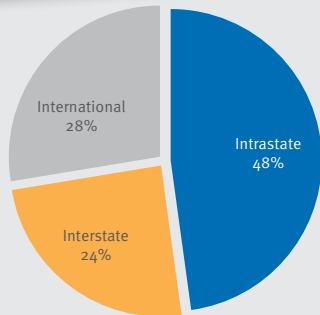
	Visitors	Expenditure (\$m)
Domestic Overnight	674 000	\$315.4m
Annual % change	▼ -9.9%	▼ -24.3%
Trend % change	▲ 3.7%	▲ 6.0%
International Overnight	45 000	\$27.3m
Annual % change	● 0.0%	▼ -18.8%
Trend % change	▼ -2.7%	▲ n/p
TOTAL	719 000	\$342.7m
Annual change	▼ -9.3%	▼ -23.9%

- increasing new hotel stock
 - Hundreds of new rooms were opened during the past 12 months, with hundreds more expected throughout the year. Approximately 230 rooms have come online, with an additional 310 rooms scheduled to be built.
- developing new tourism products that capitalise on natural attractions in the region
 - New tourism operators and attractions during the year included Jet Storm Mackay Pty Ltd (jet boat adventures), Eagle Rider Australia (Harley Davidson tours), Flyboarding Mackay, and GoWake Cable Park.



Whitsundays

State of the Industry 2014



The goal for Whitsundays Marketing Development Limited (WMDL) is to achieve \$1.242b in visitor expenditure in the region by 2020. Strong industry engagement at events such as the Airlie Beach Tourism Summit in May 2013 has informed the strategic priorities for meeting that goal. The strategic priorities include:

- engaging consumers directly to increase awareness and appeal of the destination and grow visitor expenditure, dispersal and duration of stay
- increasing the awareness and appeal of the Whitsundays as a premier choice of wedding destination
- increasing the awareness of the Whitsundays in key domestic and international markets as a business events destination for conferencing and incentives
- engaging directly with domestic trade
- developing and growing existing events and new events that will drive visitation and expenditure
- identifying and developing new market opportunities
- building the region's reputation for delivering quality products and services.

The Whitsundays region has been focused on improving market performance. While the business events market is a key priority for the region, over the past 12 months focus has also been on increasing awareness and converting business, in particular to stimulate the mid-week market.

In 2013–14, WMDL also developed its first China Tourism Strategy and worked closely with TEQ international directors on public relations and trade education in key markets.

WMDL has been working with industry, TEQ and Whitsunday Regional Council to achieve the outcomes outlined in the Whitsundays DTP. This partnership has resulted in the strongest collaborative marketing approach for the region in recent years, with specific focus on promoting the destination for events, weddings and short breaks, and the regional drive market which targets communities within 400 kilometres of the region.

Due to an increased emphasis on event acquisition in the *Whitsundays Events Innovation Strategy*, WMDL developed new events for the region and helped local event managers build capacity. Over the past 12 months events in the region have included the Whitsunday Reef Festival, Airlie Beach Race Week and Airlie Beach Music Festival.

Regional campaigns targeting audiences in Brisbane, Sydney and Melbourne include: 'Every shade of perfect', 'Whitsundays season of sailing' and a major online retail campaign partnering with WOTIF.com. Each of these campaigns involve partnerships with Virgin Australia, Jetstar and Tiger airlines, as all three airlines service the region's two airports.

WMDL partnered with Weddings Whitsundays to promote the region for destination weddings and honeymoons by launching the inaugural Whitsundays Wedding Expo in March 2014, which generated publicity and media famils.

There was also focus on building industry capacity in travel trade and increasing the number of internationally ready operators in the trade development space, with opportunities to capitalise on the growing cruise market—which receives approximately 48 visiting ships to the region annually.

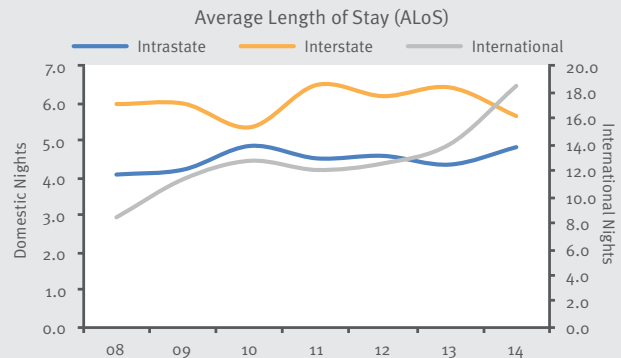
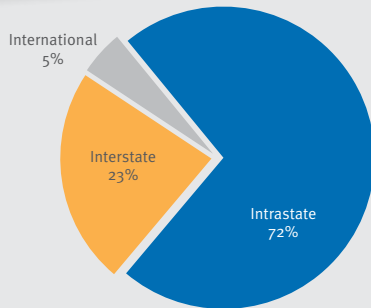
	Visitors	Expenditure (\$m)
Domestic Overnight	495 000	\$586.5m
Annual % change	▲ 4.7%	▲ 1.6%
Trend % change	▼ -0.6%	▲ 5.2%
International Overnight	189 000	\$127.1m
Annual % change	▲ 2.1%	▼ -2.6%
Trend % change	● 0.1%	▲ 3.5%
TOTAL	684 000	\$713.6m
Annual change	▲ 3.9%	▲ 0.8%

The inaugural Whitsunday Tourism Exchange was held in February 2013, and was attended by local industry operators, wholesale product managers, and frontline trade and online travel agencies. Participants not only increased their product and destination knowledge, many formed direct commercial partnerships with local businesses to boost distribution of local products through the travel distribution system nationally. The Whitsunday Tourism Exchange was followed by a combined leisure and business events east coast roadshow in March 2014.



Outback Queensland

State of the Industry 2014



Queensland's Outback is a vast, rugged and unspoilt destination, offering a variety of natural, cultural and historical attractions. National parks and the natural features of the landscape cater for a range of special interest activities, including inland fishing, dinosaur 'digs', fossicking, birdwatching and four-wheel driving, as well as some of the world's best stargazing and rural experiences. The destination boasts numerous authentic heritage attractions and vibrant country towns that bring the legends and the stories of the Outback to life.

Despite its population, the Outback plays an essential role in Queensland's economic growth and Gross Regional Product, with its predominant farming and agricultural industry, and the support of a fast-growing mining and resources industry.

Although there has been a slight decline in visitors to the Outback during the past year, there has been an increase in yield, which suggests visitors are willing to pay for a quality experience. The Outback industry has been wary of pricing its product out of the market, but if increase in yield continues, the region is likely to see a positive approach to product renewal and development.

'Outback Queensland Eventures' will continue to be the region's primary marketing campaign. During 2013-14, the campaign was incredibly successful and received financial support from 17 local government organisations. In addition, the campaign also attracted more than \$150 000 from private sector investors. In as little as 18 months, the campaign enticed more than 30 100 fans, and the 'I kept my promise' t-shirts continue to be popular with travellers attending events in the region. The media and PR attention, which focused on quirky stories, characters and events, exceeded all expectations and is estimated to have generated over \$7m.

While many challenges exist for the region, there are also endless opportunities. The region has embraced the *Queensland Drive Tourism Strategy* to position itself as a welcoming destination for caravan and camping tourists looking for an experience that can combine bush camping with commercial facilities. According to the Recreational Vehicle (RV) Manufacturers Association of Australia, production of vehicles remains at an all-time high, with approximately 20 000 new recreational vehicles produced each year for the past three years. RV production is one indicator that caravan and camping tourists should remain a key focus for the region, with another positive sign revealed through the VFR market which, as at June 2013, had increased 7%.

Opportunities for the region include providing new eco-experiences within national parks, restoring iconic pubs, increasing station-stays and upgrading the standard of accommodation in small towns. There is also an opportunity to develop unique, boutique-style accommodation in remote and naturally beautiful locations, providing high-end experiences, superb facilities and first-class hospitality. As the product offering in Outback Queensland advances, so does the need for effective trade partnerships—which is a focus area for further development.

The Outback Queensland Education Tour Subsidy Program was very successful during the year as industry embraced the program wholeheartedly and some local governments even developed their own promotional material for schools. Local government may also provide further subsidies in addition to existing arrangements to entice schools to host school camps in the region. Changes to the national education curriculum have enabled the program to expand into secondary schools, with links between Outback products and curriculum topics for school years 5, 6, 7 and 8.

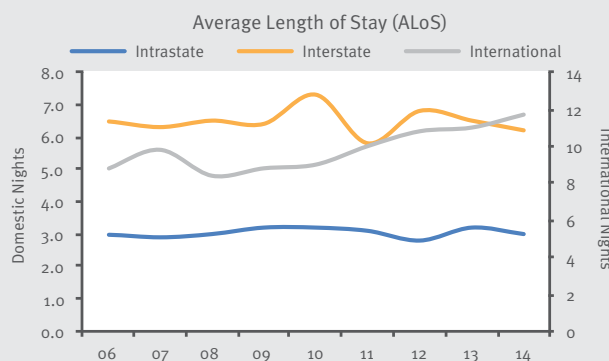
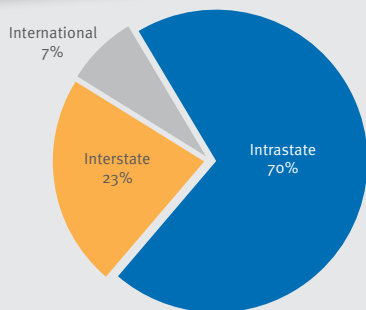
	Visitors	Expenditure (\$m)
Domestic Overnight	366 000	\$240.4m
Trend % change	▲ 5.2%	▲ n/p
International Overnight	18 000	n/p
Trend % change	▼ -7.8%	n/p
TOTAL	384 000	n/p
Annual change	▲ 4.5%	n/p

There are discussions between industry, local government organisations and the Outback Queensland Tourism Association (OQTA) about renewing the program for another three years.



Sunshine Coast

State of the Industry 2014



Tourism is a major economic activity and lifestyle driver for the Sunshine Coast region, and visitor expenditure impacts a number of key regional economic sectors. The visitor economy is predominantly made up of domestic holiday makers. Visitors such as VFR travellers, attendees at major events and business travellers are predominantly from Australia, with a large share of visitation generated by the intrastate drive market. International visitors make up 8% of total visitors to the region. Visitors spend an average of \$6.5m each working week and support over 42 000 jobs directly and indirectly. The Sunshine Coast’s 2020 target is to generate \$3.93b in overnight visitor expenditure.

During 2013–14, industry confidence significantly increased, with many operators reporting that the September school holidays, the lead-up to Christmas, the New Year’s break and Easter have been the best in many years. Similarly, Sunshine Coast Airport experienced consistent growth in arrivals, despite Tigerair withdrawing its Melbourne–Sunshine Coast service.

In 2013–14, Sunshine Coast Destination Limited (SCDL) worked with TEQ on the ‘Make the most of the moment’ campaign, which was focused on increasing destination awareness in Sydney, Melbourne and Brisbane. It was one of the largest marketing campaigns ever implemented in the region. The campaign’s theme, ‘disconnect to reconnect’ targeted the universal problem of overusing technology, moving the region from a traditional attribute-led approach to one focused on the emotional benefits a holiday on the Sunshine Coast can deliver. Tourism Australia’s domestic research indicates that technology overuse is an increasingly important motivator in the Australian holiday travel decision-making process.

In 2013–14, there were three bursts of activity under the ‘Make the most of the moment’ campaign in the interstate markets, in September, February and May.

Direct flights from Auckland to the Sunshine Coast have grown substantially. Air New Zealand has signed a three-year commitment to increase the original 12-week season (from June through October) to a 30-week season by 2016–17. It is estimated this will inject \$54m into the Sunshine Coast economy. SCDL, in partnership with Air New Zealand, TEQ and Sunshine Coast Airport, continued to raise awareness of the region to New Zealand through targeted marketing campaigns, niche marketing (with a strong focus on golf) and ongoing trade engagements between March and June 2014—in line with New Zealand’s peak booking period. Air New Zealand flights to the region have almost been at full capacity throughout the season.

In 2013–14, SCDL focused on its western markets (particularly the United Kingdom and Germany) through ‘Australia’s Nature Coast’ (ANC) partnership with FCO, which culminated in the development of an integrated German tactical campaign. The campaign has already reached more than 10 million consumers in Germany. SCDL also focused on South-East Asia, particularly Singapore, Hong Kong and China, through its Business Events International Strategy.

SCDL and TEQ partnered to deliver industry development programs such as digital workshops and master classes, digital coaching sessions, website reviews, domestic-ready mentoring and an international-ready mentoring program. A yield management and packaging program was also introduced to encourage tourism operators to package their products and work together. It included a workshop, mentoring and an operator toolkit.

	Visitors	Expenditure (\$m)
Domestic Overnight	2 808 000	\$1746.1m
Annual % change	▲ 4.6%	▼ -15.9%
Trend % change	● -0.1%	● 0.1%
International Overnight	231 000	\$214.5m
Annual % change	▲ 1.8%	▲ 23.1%
Trend % change	▼ -4.3%	▼ -1.9%
TOTAL	3 039 000	\$1960.7m
Annual change	▲ 4.4%	▼ -12.9%

Many Sunshine Coast tourism operators attended an inbound roadshow to Melbourne and Sydney, a product manager's day in Brisbane and a TEQ Inbound Tour Operator Workshop in Sydney. Operators continue to place a high value on the programs.

The top priority in the Sunshine Coast DTP is to drive increased visitor expenditure in the region by growing its signature events and acquiring new mid-week events.

The region has enjoyed significant success with its existing events portfolio and is rapidly securing a reputation as an elite sports hub, with hero events such as the Noosa Triathlon, Ironman 70.3 and Tough Mudder Events driving strong visitation to the region. Other events such as the Noosa International Food and Wine Festival and the Real Food Festival have enabled the region to optimise Tourism Australia's 'Restaurant Australia' initiative, and the Caloundra Music Festival, Noosa Jazz Festival and Gympie Music Muster have also brought strong visitation to the region during shoulder and off-peak months. The ability to drive mid-week visitation is a key focus in attracting new signature events to the region.

Business events are also important drivers of mid-week visitation. Although business events contribute \$60m to the economy, growth is hampered by the lack of a branded five-star hotel and a convention centre capable of seating 3000 people—which is critical if the region is to reach its \$3.93b target by 2020.

Another top priority for the region is the development of iconic experiences. The Obi Obi Zip Line project is moving closer to completion and, as part of Australia's Nature Coast, the region has brought to life a new tourist drive called 'The Great Beach Drive', which links Noosa North Shore to Rainbow Beach, Fraser Island, Hervey Bay and Maryborough.

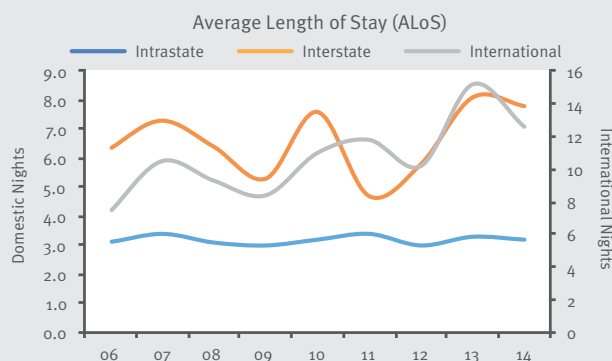
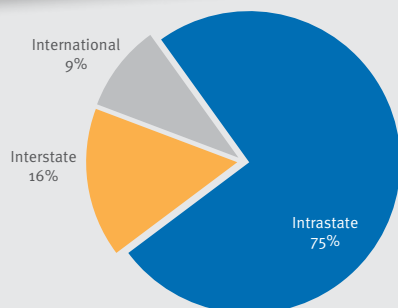
During 2013–14, the region introduced a new food tourism trail and a swimming with humpback whales experience, and there has also been noticeable reinvestment in existing experiences such as the \$5m upgrade to Sea Life Mooloolaba. The region is enjoying increased investment in new product with several new experiences on the horizon.

Other DTP priorities include developing a niche marketing and product development strategy to increase air access and route development, and upgrade of the Bruce Highway.



Townsville North Queensland

State of the Industry 2014



Domestic visitors to Townsville North Queensland increased during the year, which can largely be attributed to the growing VFR market. The need to extract more yield from visitors, especially from the VFR market, resulted in the development of a ‘Tourism is everyone’s business’ campaign, which aims to educate the local community and industry about the importance of tourism and events in the region. The campaign was part of an overarching Tourism and Events Month project, which also included a trade program, industry development conference and a consumer campaign. The Tourism and Events Month project showcased regional products and experiences, helped to build industry capacity, and connected operators with trade personnel to increase distribution of the region’s products. This project was also built on research indicating that 71% of the local community supported the development of tourism, and this project embraced the opportunity to use locals as ambassadors for the region.

Overall, growth in domestic visitors resulted in structural changes to the region’s visitor mix, as leisure visitors increased and business visitors declined. Growth was driven by an increase in holiday visitors and VFR travellers, but most of these visitors stayed with friends and relatives, not in paid accommodation. Business visitors are essential to the visitor mix, so the decline in business visitation caused by a slowdown in the resources sector has significantly impacted on the accommodation, hospitality and retail sectors. Acquisition of business and leisure events especially during the shoulder season has been identified as a priority in 2014–15 to directly benefit those sectors.

In 2013–14, Townsville Enterprise Ltd (TEL) and TEQ worked with industry to develop a brand for Townsville that differentiates the destination and establishes it as a focus for future marketing activity.

An integrated brand awareness campaign featuring the tagline ‘Townsville, North Queensland, Alive with curiosity’ was launched in June 2014 targeting regional Queensland and Brisbane, promoting leisure products and events. A continued focus on building brand awareness and conversion within these markets will remain a priority for the region in 14/15, with a campaign scheduled for early 2015. There will also be a focus on increasing awareness and conversion from an interstate audience with the execution of a campaign promoting Magnetic Island as the hero experience for this market.

International visitor number analysis indicates there needs to be increased expenditure from the international market to meet the region’s 2020 expenditure target. Over the past three years, TEL and industry partners have been targeting educational groups from universities in the USA to help increase international visitation and also position the region as a centre for excellence for educational experiences. Increasing the length of stay of the Youth and Adventure market is also a core part of this strategy.

In 2013/14 the Townsville Enterprise Convention Bureau successfully secured over \$9m worth of events for the region, equating to over 9000 room nights for the local industry.

Increased public and private investment in the region’s tourism and events industry is integral to the success of the destination and achievement of its 2020 expenditure targets. Key stakeholders strongly support the development of an integrated stadium and entertainment centre that will provide a venue for large-scale business, sport and entertainment events, and significantly increase visitation to the region by attracting priority source markets. Ecotourism and infrastructure to support these higher-level learning experiences were also identified.

	Visitors	Expenditure (\$m)
Domestic Overnight	936 000	\$682.4m
Annual % change	▲ 5.4%	▲ 18.9%
Trend % change	▲ 5.9%	▲ 12.2%
International Overnight	96 000	\$78.1m
Annual % change	▼ -15.5%	▼ -14.9%
Trend % change	▼ -7.5%	▼ -3.1%
TOTAL	1 032 000	\$760.5m
Annual change	▲ 3.0%	▲ 14.2%

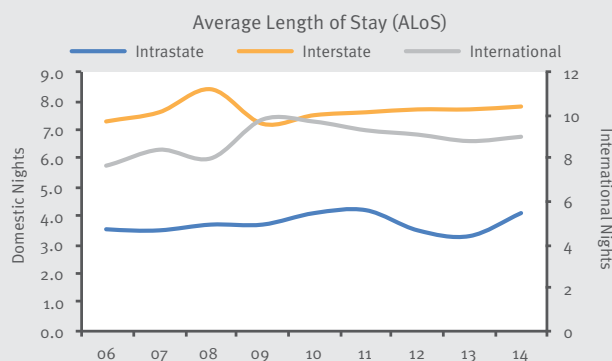
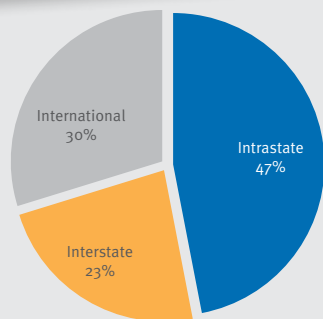
The cruise market will also be targeted to encourage visitation to the region during low season. There was increased cruise visitation to Townsville in 2013–14, following an \$85m upgrade to the Port of Townsville’s Berth 10 and construction of a dedicated cruise terminal accommodating cruise ships and military ships.

In the Townsville North Queensland DTP that will guide the next six years of planning and developing for the region, Townsville was also identified as a significant trade and investment gateway for Asia. There is an opportunity to leverage the region’s strength in business and education to increase Townsville’s share of the Asian leisure market in North Queensland.



Tropical North Queensland

State of the Industry 2014



Over the past 12 months, the partnership between Tourism Tropical North Queensland (TTNQ) and five LTOs strengthened and was marked by the signing of a memorandum of understanding. The strength of this partnership resulted in a successful RTO Contestable Funding Grant bid for the ‘Drive North Queensland’ campaign.

TTNQ’s continued partnerships with local councils, the Department of National Parks, Recreation, Sport and Racing (DNPRSR), James Cook University and many regional sporting clubs provided the catalyst for the region to secure hosting for the Union Cycliste Internationale (UCI) Mountain Bike World Cup Cairns in April 2014, and again in 2016, and the World Championships in 2017.

In May, approximately 600 international tourism buyers and 1200 delegates from Australia attended the Australian Tourism Exchange (ATE14) in Cairns. It was the first time the event has been held in a regional area in its 35-year history. The successful event was a collaboration between Tourism Australia, TEQ, TTNQ, Cairns Regional Council and various other local organisations. The ATE14 is estimated to generate \$10m and increase international expenditure by 10% in the 12 months following the event.

The 2013, ‘One day in paradise’ campaign, and the 2014, ‘This is my paradise’ campaign, successfully engaged industry, travel wholesalers and airline partners and cemented a wide range of partnerships. The multi-platform approach to these campaigns involved using both traditional media and social media. The next iteration of the campaign is currently in development.

Despite several challenging years for tourism, which saw traditional markets soften due to the global financial crisis, reduced air access to the region and natural disasters, there is now renewed industry confidence. A sense of optimism is returning as global economies improve and China’s emerging markets begin to establish—China will ultimately be the largest international market for the region. Investor interest in the region was stimulated by the proposed multi-million-dollar Aquis Resort and property developments on Double Island and at Ella Bay. Industry confidence was further boosted by events such as ATE14, UCI Mountain Bike World Cup and the G20 Finance Ministers’ Meeting. While the region’s event calendar is growing, it still continues to feature regular events such as the Australian Football League, National Rugby League, Cairns Airport Adventure Festival, and the Ironman Cairns series.

The Cairns Delegate Advantage program is a joint initiative between TTNQ, Cairns Chamber of Commerce and the Cairns Convention Centre. The program provides conference delegates value added or discounted products and services in Cairns. It is open to members of those organisations.

A customer service training program is being implemented in conjunction with Tropical North Queensland TAFE. The program, which aims to enhance customer service delivery and give it a local flavour, will be applied to all service industries, not just the tourism sector.

	Visitors	Expenditure (\$m)
Domestic Overnight	1 626 000	\$1688.3m
Annual % change	▼ -1.2%	▼ -0.7%
Trend % change	▲ 6.9%	▲ 2.9%
International Overnight	689 000	\$844.2m
Annual % change	▼ -2.4%	▼ -4.6%
Trend % change	▲ 2.1%	▲ 3.7%
TOTAL	2 315 000	\$2532.5m
Annual change	▼ -1.5%	▼ -2.0%



Our universities

State of the Industry 2014



'I recently graduated from University with a Bachelor of International Hotel and Tourism Management. I chose to major in Tourism as it is a global, multi-faceted industry. It offers diverse job opportunities all over the world in a range of different positions in both the private and public sectors. I also was drawn towards the tourism industry in Queensland as there is the added benefit of the public and private sector working so closely to ensure our destination's success on a global platform.' — Ms Chealsey Saunderson, University of Queensland Graduate

Strengthening our relationships with the education and research sector

Queensland has well established strengths in tourism research with two of the top five universities in the world in this field. This is based on the quality of research produced from 2000–2009 (Park et al., 2011). One of the challenges we face is bringing the research and knowledge capacities of our universities together with the real challenges presenting to our tourism businesses. By establishing a genuine long-term government, industry and tertiary institution relationship, collectively, we will be able to deliver a collaboration agenda that better supports industry needs.

At the 2013 *DestinationQ* Forum, industry recognised that businesses need to understand their customers better. DTEB and TEQ often undertake research with external contractors to support industry development projects. However, since the cessation of the Cooperative Research Centre for Sustainable Tourism, the gap between industry needs and research that can be applied readily has widened, particularly in the case of small business operators, who are challenged in undertaking their own research and in interpreting data for practical application to their business operations. Collectively, the research capability of tertiary institutions has the capacity to help fill these gaps by better aligning with business and industry priorities, and assisting organisations to plan for the future.

Further, producing more relevant and applied research for industry will allow tourism schools in tertiary institutions across Queensland to build their reputation and gain more support from within industry. Of course, research is not the only avenue for problem-solving collaborations between universities and business. Work placements, postgraduate projects and, potentially, staff interchanges are just the beginning of possible opportunities.

By establishing a genuine long-term government, industry and tertiary institution relationship, collectively, we will be able to deliver a collaborative agenda that better supports industry needs.

The Honourable Jann Stuckey, Minister for Tourism, Major Events, Small Business and the Commonwealth Games, will host a Minister's round table of relevant industry and research stakeholders in late October 2014; preceded by a tourism government, industry and academia forum. The objective of the round table and forum is to develop ways of collaborating to solve real issues and create innovation potential by establishing a collaborative working partnership for the future. Establishing a solid research agenda will also ensure Queensland is in the best position to achieve the industry's 2020 growth target.

While this activity looks to the immediate future, government has already explored new partnership opportunities with universities through the involvement of our university students in developing our 20-year plan for Queensland Tourism, *Destination Success*.

Our university partners' individual curricula and research priorities have also brought a wealth of new thinking, which will ultimately support our own industry's development; as well as provide inspiration for the next generation of tourism leaders. The following snapshots give a small glimpse of their work over the past 12 months; including their close relationships with industry.

TAFE Queensland Brisbane, College of Tourism and Hospitality

At TAFE Queensland Brisbane, students seeking a tourism career can undertake a diploma in the disciplines of hospitality, tourism or events at the College of Tourism and Hospitality (COTAH).

Their studies immerse them in holistic and authentic industry projects.

Industry placements and immersion projects provide a ‘consultative style’ of learning, which allows students to enhance real hotel operations and assist businesses with their daily performance. Key industry project partners include the Royal National Agricultural and Industrial Association of Queensland (RNA) Ekka Showgrounds, the Jephson Hotel, the Point Hotel and QPAC. These partnerships engage the local business community, and build strong partnerships with the local tourism industry.

Students can also access ‘real-world’ training through the Disney World International Program—COTAH is the preferred provider for the prestigious program at the Walt Disney World Resort in Florida.

‘the teachers are very helpful and had given me the encouragement and drive I needed to succeed in my studies... The course structure is very good. It allows appropriate amount of time to study and gain important skills and information we need that will assist us in being job ready in the future’ — Ms Melissa Camasis-Smith, Diploma of Tourism student 2012 (Southbank Institute of Technology)

Bond University, Department of Hotel and Tourism Management

During 2013, Bond University students completed internships with the following hospitality and tourism organisations: Marriott Hotels (Surfers Paradise Marriott Hotel and Spa), Accor Hotels (Sofitel, Gold Coast), Jumeirah Hotels and Resorts (Burj al Arab, Dubai), Daydream Island (Whitsundays, Queensland) and Disney (Walt Disney World, Orlando, Florida). The year 2013 also saw graduates from Bond University secure places on a number of industry Graduate Management programs, including Accor Ambassador Pathway, Marriott Voyage Global Leadership Program and Shangri La Hotels Corporate Trainee Programme.

One of Bond University’s major research projects, the Beach and Surf Tourism and Recreation in Australia: Vulnerability and Adaptation project was a joint university project involving researchers from Griffith University, the University of New England, Curtin University and the Commonwealth Scientific and Industrial Research Organisation (CSIRO), and led by Dr Mike Raybould from Bond University in 2011–13.

Funded under the National Climate Change Adaptation Research Facility (NCCARF), the project brought together \$430 000 from NCCARF, and non-cash contributions totalling \$1m from partner institutions, to identify and value existing market and non-market recreation values related to beach use by tourists and local residents (in case study locations), and to assess the extent to which these values are threatened by climate change.

‘The internship program was the most important part of my university study and it is still the reason why I recommend Southern Cross University today.’ — Ms Tegan Jennings, who completed her undergraduate studies at SCU, and has been Queensland Events and Operations Manager of the Men of League Foundation for more than five years

Southern Cross University, Tourism and Hospitality Management

Southern Cross University (SCU) has been an internationally recognised leader in tourism, hotel, gambling and events research and education for more than 20 years, promoting diverse opportunities for students to engage with industry. More than 30 students are currently enrolled in PhD studies on tourism topics ranging from gastronomic tourism to women’s surfing.

SCU’s internship program, a feature of its undergraduate and postgraduate coursework awards for nearly 20 years, gives graduates a wonderful opportunity to hone their skills and knowledge in the workplace, and to establish industry career networks during their studies. SCU is a research-intensive university whose tourism research was recently ranked at world standard in the national Excellence in Research for Australia evaluation. SCU’s priorities in tourism-related research are:

- Regional and remote tourism, including national parks, Indigenous tourism, and nature-based and wildlife tourism
- Destination development, marketing and sustainability
- Visitor behaviour and management
- Tourism planning, policy and management
- Gambling, including problem gambling and Indigenous gambling.

Griffith University, Department of Tourism, Sport and Hotel Management and Griffith Institute for Tourism

The Department of Tourism, Sport and Hotel Management was awarded the prestigious title of Australia's best tourism educator at the recent National Tourism Awards. It has also been inducted into the Queensland Tourism Hall of Fame, after winning the Tourism Education award three years in a row. What's more, it has won this title nine times in just over a decade. Students are able to undertake degree programs at the undergraduate, Masters and PhD level in tourism and hotel management, sport and event management, and real estate and property development. We have over 40 staff actively involved in teaching and research, and supervising doctoral students across all the aforementioned program areas.

In March 2014, Griffith University unveiled its investment in a new tourism research facility, the Griffith Institute for Tourism (GIFT). GIFT has been set up to further develop research excellence, and engage with industry and governments to jointly contribute to a more sustainable, productive and resilient tourism sector. GIFT's research priorities are in the fields of sustainable tourism, customer experience, destination management, China tourism and tourism business in the Asia-Pacific. While the university's tourism research is ranked number three globally in terms of research outputs, it is ranked number one in the area of sustainable tourism, and its researchers work collaboratively with partners locally (Gold Coast Tourism), nationally (Tourism Research Australia) and internationally (United Nations World Tourism Organization (UNWTO)).

Established in 2011, the university's Tourism Confucius Institute (TCI) is also fostering strong research links and collaborative opportunities with China in the field of tourism. Established under an agreement between Griffith University and the Office of Chinese Language Council International (HanBan), and in partnership with the China University of Mining and Technology, Xuzhou, TCI promotes the learning of Chinese language and culture at Griffith University, and in the broader community. November 2014 will see GIFT and TCI bring together over 100 Australian and Chinese government, education and research institutions, as well as tourism industry representatives and private citizens on the Gold Coast to participate in the 'First East-West Dialogue on Tourism and the Chinese Dream'. The aim of this conference is to enhance mutual understanding between the two cultures, and to build synergies between Australia and China in tourism development.

James Cook University, School of Business: Hospitality and Tourism Management

James Cook University (JCU) offers tourism at three Queensland campuses (Townsville, Cairns and Brisbane), as well as internationally at its Singapore campus. In the most recent Australian university ranking for research excellence, JCU saw its tourism discipline receive a ranking of 4 (above world standard); one of only two universities in Australia ranked at such a high level.

Over 130 postgraduate students are enrolled in JCU Masters programs. JCU also extends to its students the opportunity to learn in ways which are linked to the real world of business. Through Work Integrated Learning (WIL), JCU undergraduate students are increasingly engaging with industry through a variety of workplace situations. These can be anything from a professional internship, working in a group on a community project, through to visiting an Australian business or having business professionals work with students in the classroom.

JCU research has 20 of its PhD students researching a range of issues, including tourism in agricultural areas, Chinese tourism, city tourism, community benefits of tourism, specialist tourism segments and backpacking. The research priorities for the tourism discipline focus on a broad range of interests, but generally they have a unifying theme centred on tourism in the tropics. Climate change, reef and rainforest tourism are major areas of research, as well as tourism demand and the benefit of tourism to the community. While JCU researchers work closely with industry in Townsville and Cairns on region-specific tourism issues, the discipline also has active research projects in China and other parts of Asia, as well as with UNWTO. JCU also actively engages with the Pacific Asia Travel Association.

The University of Queensland, UQ Business School (Tourism Group)

The University of Queensland (UQ) is a centre for tourism research training, with 37 PhD, 10 Masters and 8 Honours students undertaking research projects.

UQ's research priority areas include tourism marketing, visitor behaviour and experiences, sustainable tourism, eco and wildlife tourism, tourism and technology, and tourism workforce development. Over the past 12 months UQ has attracted significant external funding for this work, including nearly \$750 000 from the prestigious Australian research funding body, the Australian Research Council (ARC), and more than \$1.3m from Australian and international research projects.

Research findings have informed policy development and industry practices, including the sustainable development of Indigenous tourism in Australia, guiding workforce planning in remote locations, improving onsite and post-visit environmental learning experiences of visitors, understanding how to best use the internet as a tourism marketing tool, identifying travellers who do not cancel trips in case of unexpected disasters occurring, developing new approaches to sustainable tourism, developing more valid measures of destination image, understanding sports marketing, and improving the understanding of grey nomads.

UQ is the only institution in Australia to offer programs accredited by the UNWTO:

- Bachelor of International Hotel and Tourism Management
- Bachelor of International Hotel and Tourism Management (Honours)
- Master of Tourism, Hotel and Event Management
- PhD in Tourism.

Approximately 230 students have been involved in the university's WIL programs, including the Executive Shadowing Program and the Tourism Regional Immersion Program (TRIP). These projects are a valuable tool for assisting students to make the leap from university to work life, and seeing the value in creating a career.

'I have access to the world-leading expertise of tourism researchers, making it the best place to learn from the best people.' – recent graduate
Ms Ines Valenzuela (University of Queensland)

University of Southern Queensland, School of Management and Enterprise: Tourism and Events Management and The Queensland College of Wine Tourism

The University of Southern Queensland (USQ) offers collaborative programs with the Tertiary and Further Education (TAFE) sector in the areas of Hospitality Management and Tourism, which connect students with the tourism industry—the Bachelor of Business (Marketing and Hospitality Management), Bachelor of Business (Tourism Management) and (Tourism and Events Management). USQ offers these programs at both its Toowoomba and Springfield campuses. A dedicated group of staff engage with local tourism operators and marketers to work on collaborative Tourism research projects. Research carried out to date includes work with the Felton Food Festival, measuring market effectiveness and product development opportunities, and research with USQ's Australian Centre for Sustainable Business and Development on female entrepreneurship in small regional businesses, with a specific focus on tourism.

In addition, USQ also operates the Queensland College of Wine Tourism, located in Stanthorpe, which offers programs in Wine Science. This program prepares students for a career in the wine industry, with flexible programs of study offered in distance mode. One of USQ's recent graduates, Mr Christopher Lawrence, completed his degree in the Yarra Valley after spending time in the Granite Belt, and also in the United States of America's wine-growing regions. Mr Lawrence is now employed full-time as a winemaker with one of Australia's premier wine companies.

'I really liked the flexibility USQ gave me, which allowed me to work, travel and gain professional experience' ... Now I am a winemaker—I'm doing what I love!
–USQ Graduate, Mr Christopher Lawrence
(in preparation for his valedictory speech)

Destination Success: Action plan report

State of the Industry 2014



'At the 2013 forum, industry and government together settled upon a long term plan for the industry—Destination Success. Importantly, this plan was led by industry and developed from the grass roots through broad consultation and workshops representing all of Queensland's regions. Based on strong evidence about future trends, and supported by first-hand operator experiences, the plan was warmly received by industry and endorsed favourably via a voting system. I am proud that this long-term view interwoven with strong industry ownership through valued, enduring partnerships is guiding our approach. At a destination level, industry and local stakeholders have been working closely through the destination tourism planning process and active engagement of councils is taking place. The tourism industry recognises the significance of local government involvement in meeting visitor expectations. Our strong partnership with industry has laid the foundation to take the industry forward to reach our goal of making Queensland Australia's number one tourism destination and doubling visitor expenditure from \$15b to \$30b by 2020.'— The Honourable Jann Stuckey MP, Minister for Tourism, Major Events, Small Business and the Commonwealth Games

Launched in February 2014 at the Brisbane International Airport by the Honourable Jann Stuckey MP and the QTIC Chairman Mr Shane O'Reilly, *Destination Success: the 20-year Plan for Queensland Tourism* sets out our path to create a successful and competitive Queensland tourism industry ahead of the megatrends.

Destination Success will ensure we have the necessary strategies in place to optimise our opportunities and address key challenges.

The plan sets a shared vision for Queensland tourism, underpinned by six themes to deliver the vision:



build strong partnerships



preserve our nature and culture



deliver quality, great service and innovation



target a balanced portfolio of markets



offer iconic experiences



grow investment and access

The action plan

Annual plans, with actions for government agencies and our industry partners, will be developed each year to guide implementation of *Destination Success*. The first action plan to 2015 includes 129 actions (covering the first 18 months of the 20-year plan) to focus our efforts over the short to medium term.

The following chapters report on progress against the Action Plan over the past six months. The full outcomes on the Action Plan will be reported in the 2015 State of the Industry Report. To see progress against all 129 actions, visit www.destq.com.au.





Build strong partnerships

State of the Industry 2014



‘Engaged and proactive local councils play a key role in the tourism industry. By restoring authority and reducing red tape, the Queensland Government has been freeing up councils to pursue business opportunities and partnerships with tourism operators. I value my new role on the Tourism Cabinet Committee—a reflection of government’s commitment to build closer relationships with our local government partners in support of the tourism pillar’. — The Honourable David Crisafulli MP, Minister for Local Government, Community Recovery and Resilience

Highlights

- Minister for Local Government, Community Recovery and Resilience joined the Tourism Cabinet Committee
- \$500 000 provided through royalties for the regions to undertake the first stage of the Eromanga Natural History Museum

Growing tourism requires strong collaborative partnerships between individual operators, RTOs, QTIC, local government, key regional stakeholders, the community and the Queensland Government. Building upon our existing relationships, and finding new ways to work with and support each other has been, and continues to be, a critical task for government and industry.

Coordinated government support for tourism

The Tourism Cabinet Committee (TCC) continued its strong focus on achieving cross-agency coordination. During 2013–14, TCC met six times to consider a broad range of strategic tourism priorities such as the new Destination Tourism Planning Framework, and 20-year plan for Queensland tourism.

The TCC also listened to industry. At the 2013 *DestinationQ* Forum, government gave a commitment to joint meetings with the QTIC Board. A central connection between industry and government is the bi-annual meetings between the TCC and the QTIC Board. Chaired by the Tourism Minister, the bi-annual meetings bring together ministers with significant portfolio responsibilities affecting tourism and the members of the QTIC Board.

This innovative forum creates the opportunity for industry and government to engage at the highest level, to identify shared priorities and to remove any roadblocks. For a long time, industry in all jurisdictions has been calling for a whole-of-government approach to tourism. With the TCC and the joint meetings with the QTIC board, Queensland has taken major steps to deliver on this aspiration. This is a genuine whole-of-government approach to supporting tourism and events.

At the 2013 *DestinationQ* forum, there was agreement that closer interaction with local government on tourism issues was critical to achieving a stronger more cohesive network, and creating greater opportunities for sustainable tourism growth. The Minister for Local Government, Community Recovery and Resilience is now a TCC member, representing local government at TCC meetings to ensure that a local government stakeholder perspective is considered on tourism issues. Given the importance of culture in *Destination Success*, the Minister for Science, Information Technology, Innovation and the Arts was also asked to join the TCC.

As such, the membership of the TCC has been expanded and now includes:

- Minister for Tourism, Major Events, Small Business and the Commonwealth Games (Chair)
- Deputy Premier and Minister for State Development, Infrastructure and Planning
- Minister for National Parks, Recreation, Sport and Racing
- Minister for Education, Training and Employment
- Minister for Transport and Main Roads
- Minister for Science, Information Technology, Innovation and the Arts
- Minister for Local Government, Community Recovery and Resilience;
- Assistant Minister for Tourism
- Assistant Minister for Planning Reform.



Government's coordinated commitment to tourism was recognised by the peak industry body, the Tourism and Transport Forum (TTF). At the 2013 *DestinationQ* forum, the TTF said, 'The Queensland Government is walking the talk and getting on with implementing many of the

recommendations which came out of the first DestinationQ conference last year ...To have the Premier and six Ministers here today demonstrates an impressive commitment to promoting jobs in the industry.'

Tourism Cabinet Committee

TCC continues to play a valuable role in coordinating tourism related business across government. The TCC has been responsible for monitoring the progress of the outcomes of the *DestinationQ* forums. In accordance with the partnership agreement signed at the 2013 forum, the TCC has twice met jointly with the QTIC Board.

The TCC has considered a broad range of strategic tourism priorities, including:

- **Marketing Priorities**—considered the progress of the Tourism and Events Queensland Tourism Investment Strategy including key domestic and international target markets and consumer activation strategies.
- **Tourism Shopping Reform**—considered Queensland's approach to the changes proposed by the Tourism Shopping Reform Group relating to the Tourism Refund Scheme.
- **The Destination Tourism Planning framework**—endorsed the framework for DTPs to be progressed by all regional tourism organisations to set their own unique direction. DTPs have since been developed for most of Queensland's 13 destinations—providing a key vehicle for devolving tourism decision-making and capacity to the regions.
- **The Queensland Camping Options Toolkit**—approved a toolkit to help local governments looking to provide a broader array of camping options. The toolkit was based on research to support consideration of new methods and tools to assist local government make informed choices on camping in their communities.

- **Abbott Government's Approach to Tourism**—considered the tourism policy of the new Federal Government and implications for Queensland
- **Ecotourism Expression of Interest Process**—considered the process for encouraging private sector proposals for new investment in ecotourism product in or near protected areas.
- **International Education and Tourism**—considered issues and opportunities to grow the international education sector and benefit the tourism industry.
- **Destination Success: The 20 Year Plan for Tourism**—endorsed the allocation of responsibility for delivering on plan priorities by government agencies.
- **Theme Park Capital**—briefed on progress in delivering the Theme Park Capital marketing campaign on the Gold Coast.
- **Asian Cup 2015**—briefed on opportunities for tourism arising from the Asian Cup soccer matches to be hosted in Brisbane in 2015.
- **Industry Reform**—considered progress on industry reform, including at a joint TCC/QTIC Board Meeting held in May 2014.
- **Tourism Employment Plan**—updated on progress towards developing a tourism employment plan in Far North Queensland.
-

Building stronger partnerships with local government

Active involvement by local government is important to the growth of the tourism industry.

The Queensland Government is committed to building stronger, better relationships with local government as key partners in developing our destinations. Councils can support tourism development via their planning schemes, encouraging investment, participating in destination marketing, and providing visitor services and tourist infrastructure. At the 2013 *DestinationQ* forum, it was agreed that closer interaction with local government on tourism issues is critical to achieving a stronger, more cohesive network, and creating greater opportunities for sustainable tourism growth.

While the Queensland Government is already supporting local government in making local decisions through the provision of guides such as the *Next generation tourism planning guideline* and the *Queensland camping options toolkit*, local government engagement involves not only supporting our local government partners through the provision of guides, but also sitting down with them to understand how, together, we can best support tourism development in our regions. With this in mind, government, in a pre-2014 *DestinationQ* forum session, convened a masterclass on *Building successful partnerships at the local government level to grow tourism*. This masterclass examined best practice in collaboration on destination development, planning and investment to develop destinations and benefit local communities.

This masterclass lays the foundation for a future 'Forum of Mayors'. As part of the Local Government Association of Queensland Annual Conference in Mackay (27–29 October 2014), the Queensland Government will convene a 'Forum of Mayors' session to engage mayors, local government CEOs and planners. This Forum of Mayors will focus on 'best practice' in growing tourism for the benefit of local communities and centre on three main themes: Destination and experience development; Tourism land use planning; and, Investment in tourism infrastructure.

Working with local government in their regions

The Department of State Development, Infrastructure and Planning (DSDIP) regional offices are working with local government to incorporate provisions in new planning schemes to achieve better outcomes for tourism-related development in rural, conservation and environmental zones.

Examples include:

- Engagement between Sunshine Coast Regional Council, DTESB, Department of National Parks, Recreation, Sport and Racing (DNPRSR), SCDL, TEQ, and SEQ Water to assist the market development of the Obi Obi Zip Line ecotourism project
- Regional assistance as part of the Statewide Expression of Interest (EOI) process for ecotourism facilities on and near national parks
- Working with applicants in pre-lodgement to find ways to minimise the constraints on development proposals and working with the applicant for a lodgement date that meant constraints could be avoided. An example is the pre-lodgement meeting for the Pure Land Learning College near Oakey.
- A new Queensland Government initiative is also partnering with councils to develop and enhance the state's network of recreational rail trails over the next four years. The Recreational Rail Trails Grants program will create the potential for new ecotourism opportunities, active commuter links and outdoor recreation activities for the community. It is intended that councils will own and manage the rail trails after a transitional period. Councils will be invited to submit expressions of interest during the first half of 2014/15.

Royalties for the regions

The Queensland Government is supporting regional development that contributes to the tourism economy. Regions across Queensland continue to benefit from Round 3 of the government's \$495m 'Royalties for the Regions' (R4R) program. Highlights include a community swimming pool precinct in Karumba, foreshore and esplanade revitalisation in Cooktown, stage one of the natural history museum in Eromanga, as well as transport infrastructure upgrades for roads and regional airports. To date, 39 councils across Queensland have received almost \$306m in funding under the program, delivering much-needed roads, community infrastructure and flood-mitigation projects. Road projects being delivered in 2014–15 include:

- four-laning at the Charlton Wellcamp Enterprise Area on O'Mara Road, Charlton
- rehabilitation and widening of various sections of the Injune to Taroom Road, Injune
- widening and sealing sections of the Arcadia Valley Road, south of Rolleston
- rehabilitation and widening of various sections of Fairview Road, Beilba.

Eromanga Natural History Museum

One project that will provide tourism benefits for Quilpie Shire is the Eromanga Natural History Museum. The museum will be home to the region's significant dinosaur and megafauna collection, as well as being itself an important tourism attraction. The R4R program is supporting stage one of the museum, which will see works comprising a fossil preparation, processing and storage facility, together with an accommodation complex to house staff, researchers and volunteers. The conditions governing recording, protection and appropriate storage of fossils are a significant part of approvals for exploration and production and, accordingly, energy companies are also contributing to this project.

Understanding community attitudes to tourism

In 2013, TEQ surveyed more than 3850 Queensland residents to gauge the social impact of tourism on regional Queensland communities. Results showed that awareness of the positive impact of tourism is stronger now than in 2010, when similar research was undertaken. The 2013 research provides valuable insights to the industry to assist in strengthening community perceptions of tourism and overall tourism outcomes. Some findings from the 2013 Social Indicator Research were:

- Queenslanders are more positive about the effect tourism has on their local community—up to 57% from 49% in 2010.
- The majority of Queensland residents agree that tourism leads to—
 - more interesting things to do
 - important economic benefits
 - improved facility maintenance
 - increased local pride
 - increased regional profile
 - great cultural diversity
 - festivals and events that attract tourists and raise awareness of the region.
- A total of 57% of Gold Coast residents and 59% of Sunshine Coast residents are happy with the way tourism is developing in their local area and would like to see it continue to grow. Compared to 2010, the Gold Coast was virtually stable (down from 58% in 2010) and the Sunshine Coast increased substantially (up from 43% in 2010).
- A majority of communities wanted to see more tourists to their region, with 64% of Gladstone and 79% of Whitsundays residents wanting more tourists (compared with total Queensland residents, 45%).
- More Sunshine Coast residents are now supportive of tourists compared to 2010 (up to 46% from 32%).
- Brisbane residents were supportive of tourism, with 56% responding that they liked tourists. This has increased from 49% in 2010 and is reflective of the state-wide result (57%).
- In Tropical North Queensland (TNQ), 68% of residents are extremely positive about tourists, and believe their local area should be trying to attract more visitors.

TEQ will be updating this research in 2016.

Growing conservation volunteering through Friends of Parks

Community plays an intimate role in preserving our nature and heritage. The Queensland Government has improved access to and the protection of Queensland's parks and forests through the Friends of Parks volunteering program, which has fostered improved visitor and conservation efforts, and developed environmental stewardship across Queensland. The program has provided \$0.53m in small grants to community groups, to deliver initiatives such as improved interpretive services, seabird monitoring, mountain bike and walking track improvements, guided cultural tours and beach clean-ups.

As part of the program, DNPRSR has also entered into contracts with Conservation Volunteers Australia, Wild Mob, ECOllaboration and Australia Nature Tours, to work with volunteers alongside rangers in locations such as Carnarvon Gorge, the islands of the Great Barrier Reef and the Misty Mountains of the Atherton Tablelands.

It is anticipated that by mid-2015, the Friends of Parks program will have completed up to 60 volunteer and 'voluntourism' projects across the state, representing almost 70 000 volunteer hours spent protecting Queensland's environment and supporting tourism.

In addition, DNPRSR commenced its Friends of Parks Campground Hosts program and has released campground hosting opportunities in 11 locations across the state. Campground hosts, in addition to freeing up rangers to undertake conservation works, are great ambassadors for Queensland National Parks. They contribute to enhancing tourism experiences in locations including Fraser Island, Daintree National Park, Lady Musgrave Island, Healthlands Regional Park and Brooyar State Forest.

To do...

- Update social indicator (community attitudes) research for all destinations in 2016
- Forum of mayors to be held in October 2014
- Rollout of Friends of Parks.



Preserve our nature and culture

State of the Industry 2014



'From the Jardine River to Girraween, and from Riversleigh to Fraser Island, Queensland is blessed with protected areas conserving a diverse array of species and ecosystems, our rich Indigenous cultural heritage and five World Heritage Areas. In partnership with the tourism industry the Queensland Government has embarked on an unprecedented journey of growing Queensland as a world leader in ecotourism experiences and showcasing Queensland National Parks as an ecotourism destination.' — **the Honourable Steve Dickson MP, Minister for National Parks, Recreation, Sport and Racing**

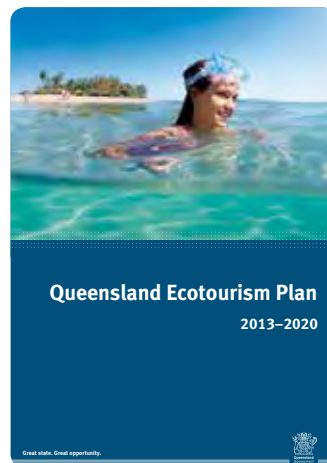
Highlights

- *Queensland Ecotourism Plan 2013–2020* to raise Queensland's profile as a leading ecotourism destination in Australia
- Amendments to the *Nature Conservation Act 1992* to support tourism investment
- State-wide expression of interest for innovative tourism ideas generated significant interest from potential investors due to commercially attractive investment model
- Release of three ecotourism concept master plans to boost investment and visitation

People and places are at the heart of the Queensland tourism experience. We are blessed with a diverse range of natural habitats to explore, and a rich cultural heritage to share. There are many opportunities to take advantage of our natural and cultural assets in a sustainable and non-intrusive way, while showcasing the best we have to offer. Government continues to generate circumstances to maximise tourism opportunities that are built around our heritage, Arts, culture, nature and Indigenous tourism experiences.

Releasing the *Queensland Ecotourism Plan 2013–2020*

The *Queensland Ecotourism Plan 2013–2020* was released at the *DestinationQ* forum on 27 August 2013, following extensive consultation. The plan provides tourism operators, government, community and other stakeholders with a clear direction on how Queensland will leverage its competitive advantage to become a world leader in ecotourism.



At the core of this plan is a new vision for ecotourism in Queensland:

Queensland is Australia's number one ecotourism destination and recognised as a world leader in ecotourism, delivering best-practice nature-based experiences that contribute to the conservation of our natural resources and cultural heritage.

This vision ensures that the delivery of ecotourism experiences contributes to the conservation of our natural resources and our cultural heritage. This vision will be achieved by implementing the following strategic priorities:

- delivering world-class experiences
- facilitating best practice and innovation
- raising the profile of Queensland's ecotourism experiences
- fostering thriving operators
- embracing a partnership approach between the tourism industry, government, community and Traditional Owners.

The plan demonstrates the strong partnership between government and industry to deliver on the joint aspiration; positioning Queensland as a world leader in ecotourism.

Implementation of many of the plan's 43 initiatives has commenced, in partnership with a range of agencies, organisations and groups to deliver the successful outcomes required. Over time, these may include, but are not limited to, local government and regional organisations of councils, QTIC, the Great Barrier Reef Marine Park Authority, Savannah Guides Ltd, the Wet Tropics Management Authority, Parks Australia, Wildlife Tourism Australia, the National Trust of Queensland and other community stakeholders.

This new approach to attracting investment in ecotourism aims to deliver contemporary and world-leading ecotourism developments in our national parks and on public lands that showcase and preserve their unique natural landscapes, wildlife and cultural heritage.

Reviewing the *Nature Conservation Act 1992* to improve access for the benefit of ecotourism

The Queensland Government has reviewed the *Nature Conservation Act 1992* (NC Act) to improve access to national parks and other public lands, and streamline the complex legislative framework governing protected areas.

In 2013 the government reviewed the NC Act to enhance access to protected areas and deliver tourism benefits. Stage 1 of the review included a range of red-tape reduction initiatives and the authorisation of ecotourism facilities on national parks.

Stage 2 of the review included broadening the object of the NC Act to provide greater support for recreation and ecotourism opportunities in the protected area estate, while maintaining the primary objective of the conservation of nature. The cardinal principle of national park management—that a national park is managed, to the greatest possible extent, for the permanent preservation of the area's natural condition and the protection of its cultural resources and values—has not been changed.

The three new objects of the NC Act allow for:

- involvement of Indigenous people in the management of protected areas in which they have an interest under Aboriginal tradition and Island custom
- use and enjoyment of protected areas by the community
- social, cultural and commercial use of protected areas in a way consistent with the natural, cultural and other values of the areas.

The review has reduced the number of land tenure classes under the NC Act from 14 to 7; this reduces legislative complexity and will make it easier for the government and commercial tourism operators to understand the different protected area tenure classes and their management requirements.

Among other amendments, the management principles for national park and regional park tenures were also reviewed, to deliver an improved balance between nature conservation and access for recreational and commercial purposes. Amendments also allow commercially attractive lease terms in the national park of up to 30 years, with an option to renew for a further 30 years. These changes support new investment in ecotourism in national parks while continuing to safeguard Queensland's natural and cultural heritage.

These changes will help to provide clarity for the tourism industry in relation to access and use of these areas in the future.

Providing ecotourism opportunities on protected areas

The Queensland Government is making substantial progress in rolling out ecotourism opportunities that have become available through recent legislative changes. Proposals for the development of low-impact, purpose-built, privately owned ecotourism infrastructure on protected areas have been sought through several processes (government-led and investor driven).

On 27 June 2013, as part of the industry initiated approach DNPRSR released an EOI calling for state-wide proposals for the development of ecotourism facilities on protected areas and adjacent state land.

The EOI closed on 27 September 2013, with an outstanding 47 proposals being submitted. Thirty-two proposals were successful in moving to the next stage of the process. Proposals ranged from small-scale, low-expenditure projects to multi-million dollar developments, spread throughout Queensland.

The proposals for privately managed ecotourism investment on protected areas included:

- infrastructure such as a suspension bridge, zipline, mountain bike park and a ropes/adventure course
- accommodation facilities, including permanent tents (glamping) and ecolodges
- the reuse of existing facilities such as shearing quarters and lighthouses.

These initiatives have significant potential to increase Queensland's attractiveness to domestic and international visitors. In addition, a number of specific sites were identified as offering potential for market investment, these included Mamu Rainforest Canopy Walkway in North Queensland, the Green Mountains campground in Lamington National Park and the Obi Obi Zip Line in Kondalilla National Park (led by DTESB).

DNPRSR has finalised commercial management arrangements for the newly renamed Mamu Tropical Skywalk with the new commercial operator commencing management of the attraction on 31 March 2014, which will support visitation growth into the region south of Cairns.

Serious potential investors have been selected to proceed onto the next stage for Green Mountains and the Obi Obi Zip Line, and local communities are following the progress of these initiatives, which have the potential to increase visitation and boost local economies.

Obi Obi Zip Line is one of the first government-led projects being tested by the Queensland Government as a demonstration project in national parks. DTESB has been successful in securing the 'in-principle' support of the traditional owners (the Jinibara People) through proactive and constructive engagement, and support from key landholder agencies, including DNPRSR, the Department of Natural Resources and Mines, Sunshine Coast Regional Council and Seqwater. DTESB is working with the proponent and key landowners to facilitate the project. Realisation of the project depends on the proponent meeting all federal, state and local government requirements, successful negotiation with the Jinibara People, and community engagement.

Improving tourism access and ensuring environmental standards in our protected areas

The Queensland Government released the 'Queensland eco and sustainable tourism' (QuEST) policy in July 2013, following consultation with the tourism industry. The QuEST policy provides business certainty, best practice standards, support for authorised operators, opportunities for growth and streamlined administration. The QuEST policy is being rolled out to priority tourism areas across the state, starting with Fraser Island. The policy provides for an increase in the term of an authority from 3 years to up to 15 years, and for transferability of agreements if a business is sold, while ensuring high standards of operation through mandatory eco-certification requirements. As the policy is implemented, additional visitor capacity is expected to be freed up and offered to the market at key locations.

In the Great Barrier Reef, the federal and state governments are working together to reduce red tape and the cost of doing business. In response to tourism industry requests for simplification, the Great Barrier Reef Marine Park Authority (GBRMPA) and DNPRSR are developing a single system to administer joint permits and commercial activity permits, and collect associated revenues. This project will extend the existing Reef Management Systems platform and deliver required amendments to the NC Act and will ensure that permit holders are the beneficiaries of an integrated, single system.

In addition to these significant changes, the Queensland Government is continuing an ongoing program of legislative, regulatory and administrative reforms to streamline permit processes and reduce red tape. Initiatives delivered during 2013–14 include simplifying the process to renew commercial activity permits and provide administrative savings to permit holders through initiatives such as allowing for quarterly rather than monthly operator returns. New initiatives will continue to be rolled out during 2014–15.

Supporting whale-watching tourism

The government is progressing initiatives to improve whale-watching experiences for operators and visitors in the Moreton Bay and Great Sandy Marine Parks, while protecting the whales as they migrate along the Queensland coast.



Initiatives introduced in 2013–14 to support the whale-watching industry and improve commercial viability include instituting a \$5000 annual fee (increased annually with the consumer price index) and abolishing passenger fees, and reducing red tape resulting in average savings of approximately \$4500 per annum for operators in Great Sandy Marine Park, and anywhere between \$5000 and \$10 000 for operators in Moreton Bay Marine Park (depending on the fees they paid in past seasons).

DNPRSR is also introducing legislative changes to provide operators with access to new areas within Moreton Bay and the Great Sandy Marine Parks.

At the same time, the government has introduced the requirement for eco certification to ensure the best possible experience for clients and maximise outcomes for the environment. It has also maintained a cap on whale-watching operator numbers in marine parks.

Commercial activity agreements with operators have been progressed during 2013–14. Regulatory amendments will be made to give effect to the proposed changes in areas available for whale watching.

The Queensland Government is currently working with whale-watching operators to trial 'swimming with whale' opportunities to expand their potential market base.

A three year trial is being run to allow 'swim with whale' opportunities to take place while reviewing key conservation and safety outcomes. This project will be managed in cooperation with whale watching operators who will develop a code of conduct to ensure that industry is establishing the benchmarks by which this new market will be developed.

Additionally, the government provided \$100 000 towards a Whale Watching Sustainability Program to support and improve the viability, resilience and visitor appeal of existing whale watching operations in the Fraser Coast region. Through the program, local whale watching operators have been supported to deliver technological advancements such as digital cameras and GoPros to capture and enhance the whale watching experience. The program has also complemented existing whale watching season marketing activity supporting the display of whale watching footage from the region across key Brisbane sites and greater activation of the 'Harvey and the Humpbacks' mascot.

Rejuvenating three National Park Gateway Visitor Centres

The Queensland Government invests up to \$8.5m each year to build and maintain visitor infrastructure. To support Queensland's ecotourism aspirations, deliver outdoor recreation opportunities and provide a boost for local communities, the Queensland Government has prioritised \$3.6m for capital upgrades to some of our most popular national park visitor centres: Mon Repos Turtle Centre at Bargara near Bundaberg; the David Fleay Wildlife Park on the Gold Coast and Walkabout Creek in Brisbane.

These centres will provide world-class educational and interpretive experiences, sharing our natural and cultural assets through education, broadening our visitors' understanding of the challenges of conservation and sustainability, and attracting revenue to assist in maintaining our protected areas.



In recognition that the redevelopment of these popular tourism attractions should be leveraged to best deliver on *Queensland Ecotourism Plan 2013–2020* objectives for Queensland as a world leader in ecotourism, Concept Master Plans for the three centres have been developed based on expert advice, and extensive community and stakeholder consultation. The final plans have been released, and will inform capital and other investment and commercial ecotourism approaches for these iconic locations into the future.

Protected areas playing host to sustainable events

Events on protected areas provide unique opportunities to showcase Queensland's natural assets, and attract national and international visitors. These activities increase regional visitation, encourage longer stays and increase visitor expenditure. Events also support regional economies by increasing visitation during off-peak tourism months.

A strategic events framework is being developed with the aim of improving opportunities and management of third-party events hosted in protected areas.

Ahead of the development of this framework, in the past year DNPRSR has continued its support of major sporting and music events in national parks and state forests, while welcoming a broader partnership approach to non-traditional events. As an example, a partnership was entered into with Cycling Australia and other stakeholders to help stage the UCI 2014 Mountain Bike World Cup in Smithfield Regional Park near Cairns, in April 2014. This 'Rumble in the Rainforest' presented a globally broadcast opportunity to showcase Queensland's national parks and to consolidate the tropical north's position as a mountain biking destination—while ensuring the event was managed within strict environmental conditions.

The Noosa International Food and Wine Festival, held in May 2014, and its sunset concerts held at the iconic Noosa National Park lookout, provides another example of balancing the protection of Queensland's unique ecosystems and landscapes while supporting a growing cultural tourism economy.

Protecting the Great Barrier Reef

The Great Barrier Reef is an extraordinary part of Queensland's natural heritage. It is precious to all Queenslanders and is a must-see destination for visitors from around the world.

It contributes \$5.7b each year to our economy and underpins our tourism industry. The Great Barrier Reef is among the planet's best-managed coral reef ecosystems and the Queensland Government is committed to retaining that reputation. We are doing more now to protect the Great Barrier Reef than at any time in living memory.

This includes addressing all of the United Nations Educational, Scientific and Cultural Organization's (UNESCO) World Heritage Committee recommendations. UNESCO requested a strategic assessment, which we have delivered. They requested port development be limited to long-established major ports and we have done that through the Queensland Ports Strategy which will be backed up by legislation. They requested a review of Gladstone Harbour and we have done that three times over, and set up the Gladstone Healthy Harbour Partnership to guide management of the harbour into the future. This year we have also seen a turning point in water quality, a watershed moment after a long history of declining water quality, and a testament to the hard work of Queensland farmers and graziers to implement reef friendly farming practices.

The decision adopted by the World Heritage Committee this year welcomed the progress made by Australia in managing the reef. UNESCO stated that it is confident the overall direction towards next year's decision is a positive one. Australia has welcomed this year's decision and will continue to implement their final recommendations including presenting UNESCO with a final *Reef 2050 long-term sustainability plan* next year which will guide the sustainability, management and long-term protection of the Great Barrier Reef well into the future.

Protecting and undertaking conservation and compliance activities in the Great Barrier Reef is critical to the long-term health of this globally significant ecosystem, and is also critical to the health of Queensland's tourism economy. The Queensland and Commonwealth Governments have jointly invested \$5m in the motor vessel *MV Reef Ranger*, a 24-metre aluminium catamaran to replace the 24-year-old *MV Kerra Lyn*, which has supported marine fieldwork and enforcement activities for two decades.

The new vessel arrived in its home port of Cairns in June 2014 and is twice as fast, more environmentally friendly and more cost-effective than its predecessor. It will provide a 50% increase in patrol days and reliable access across the 348 000 square kilometre Great Barrier Reef World Heritage Area, protecting the reef's natural values and supporting the region's tourism industry.

Infrastructure to support new sustainable recreation opportunities

DNPRSR is ensuring capital works investment is prioritised towards appropriate tourism and visitor facilities in Queensland's parks and forests. In 2013–14 improvement projects included the Forts walking track in the Magnetic Island National Park, the Chilli Beach campground expansion, the summit lookout track on Fitzroy Island National Park, upgrading the walking track at Bluff Point in the Capricorn Coast National Park, Maardja Boardwalk in Daintree National Park, and the Wynnum Boardwalk in Moreton Bay Marine Park.

Mountain biking, horse riding and other activities have been supported through a range of projects across the state, including development of the world-class mountain-bike facilities at Smithfield Regional Park and enhancements in the Atherton Forest Mountain Bike Park, to tracks at Girraween near Mount Norman, Cordalba State Forest west of Bundaberg, and South Molle Island in the Whitsundays.

The Queensland Government is also supporting marine recreation and tourism opportunities by providing \$2m in funding towards the creation of artificial reefs in the Moreton Bay and Great Sandy Marine Parks. In 2013, DNPRSR installed 224 'reef balls' in Moreton Bay to extend two existing artificial reefs, and has commenced delivery of three additional reefs, including the planned 20-hectare Turner Reef in Moreton Bay, and two larger reefs (80 hectares and 160 hectares) off Urangan in the Great Sandy Marine Park. The reefs have been planned to ensure there is no impact on existing sensitive ecosystems, while growing new fish habitats in Queensland's Marine Parks, for recreational fishing, commercial fishing and scuba diving.

Reviewing the National Parks camping booking service

Camping in Queensland's national parks is a significant tourism attractor for the state, and it is critical that the overall camping experience for international and domestic visitors is positive. DNPRSR manages over 550 camping areas across Queensland, making it the state's number one provider of ecotourism experiences.



In order to best manage the growing popularity of the state's park and forest campgrounds, the majority of camping areas and vehicle access permits can now be booked online: it is recognised that there are significant opportunities to improve the current system to make it more user-friendly and easy to navigate, more responsive to travellers with limited online access or mobile reception, and more adaptable for longer-term travellers who may wish to alter, cancel or extend their bookings on arrival at the campground. DNPRSR has completed a review of the camping booking system along with alternative options for delivery of this service, and is currently undertaking a procurement process for an experienced commercial provider to deliver this service.



‘Cultural tourism has the potential to make Queenslanders richer throughout the state. People who travel to see a show or exhibit stay longer and spend more. We’ve got a lot to show off in Queensland’s vibrant arts scene, and we’re finding ways to make it easier for tourists to access the highlights. To unlock this rich opportunity, we’re working with business and communities to maximise this huge potential’.— The Honourable Ian Walker MP, Minister for Science, Information Technology, Innovation and the Arts

Developing cultural tourism through Arts for all Queenslanders

Developing our Arts sector will play an important role in building our cultural identity, as well as increasing opportunities for Arts and cultural events that can improve intra/interstate visitation, and communicate to an international visitor a ‘Queensland experience’.



The Honourable Ian Walker MP, Minister for Science, Information Technology, Innovation and the Arts, released the *Arts for all Queenslanders strategy* in December 2013. The strategy includes strengthening cultural tourism as one of its four priorities to achieve growth of the Arts sector and a strong community of Arts. Cultural tourism is a form of tourism that encourages and supports visitors to appreciate and participate in the culture of a place, including its Arts activities.

Cultural tourism is an emerging market that has the potential to grow its contribution to the Queensland tourism economy. Research tells us that the growing number of cultural tourists stay longer and spend more.

This priority is about building Queensland’s reputation as a cultural tourism destination, vital to the Queensland tourism economy. Arts Queensland is working closely with TEQ, RTOs, QTIC and local councils

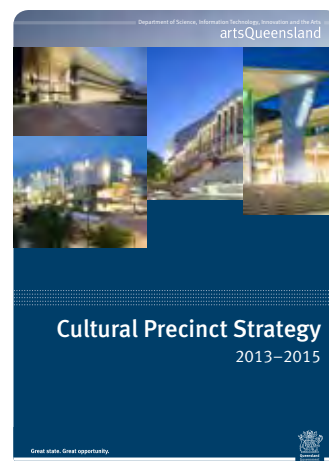
to identify Arts and cultural experiences that are unique to Queensland. These include small- and large-scale events in major cities and smaller towns that can and do have cultural and economic effect, and strengthen community identity and pride.

In June 2014 Arts Queensland and TEQ co-hosted the Cultural Tourism Connector Event, the first in a series of activities to help the Arts and cultural sector to become tourism-ready. Furthermore, the online *Arts for all Queenslanders strategy* ‘Strengthen cultural tourism’ website (www.arts.qld.gov.au/blog/index.php/category/cultural-tourism-2/) publishes stories and case studies about cultural tourism development in Queensland.

Arts Queensland is continuing to work closely with our tourism partners to identify industry needs in relation to developing opportunities such as packaging and promoting Arts and cultural experiences within tourism campaigns.

Cultural Precinct Strategy 2013–2015 creating a vibrant Arts precinct

The *Cultural Precinct Strategy 2013–2015* aims to unlock the cultural tourism potential of the the Cultural Precinct. Arts Queensland is continuing to develop plans to deliver on the priorities outlined in the *Cultural Precinct strategy* in 2014.



The Cultural Precinct, the centerpiece of Queensland's Arts portfolio, is home to the state's leading Arts and cultural institutions: the Queensland Art Gallery and GOMA; the Queensland Museum and Sciencentre; the Queensland Performing Arts Centre; and the State Library of Queensland.

The precinct represents a major investment by the Queensland Government, with a replacement value of more than \$1b, along with a \$117m annual investment in operational funding.

The *Cultural Precinct Strategy* also aims to maximise the return on public investment this unique co-location offers to the people of Queensland, grow Queensland's Arts and cultural sector, and unlock the potential of cultural tourism.

The precinct partners and key stakeholders have delivered collaborative programming designed to offer enhanced experiences for locals and visitors. Recent highlights include:

- a very cultural Christmas—a collaboration with South Bank and Brisbane Marketing to extend Brisbane's Christmas program into the Cultural Precinct, which included Christmas lighting, carollers and a special pre-Christmas shopping event
- QPAC's Out of the Box Festival—in the twenty-second year of the Festival, QPAC presented the Out of the Box program of theatre, concerts and workshops designed to provide an immersive Arts education experience. In collaboration with QPAC's program, the State Library, Queensland Museum and Queensland Art Gallery delivered a series of children's workshops, exhibitions and activities which extended the programming across the precinct.

The Cultural Precinct offers tourists to Brisbane a unique visitor experience, with the value of cultural celebrations and Arts events rated as some of the strongest motivations for international travellers (source: Tourism Australia Consumer Demand Project 2013). The ongoing work to deliver the *Cultural Precinct Strategy* will help to unlock its cultural tourism potential. The Cultural Precinct partners have reinforced Brisbane's reputation as a hub for cultural tourism, with achievements, including:

- the highly successful Cai Guo-Qiang: *Falling Back to Earth* exhibition at GOMA. With more than 200 000 people visiting GOMA to see this work, this exhibition became the second-highest attendance rate, following the Andy Warhol exhibition in 2007–08. In particular, 10 703 people travelled to Brisbane specifically to see the exhibition

- *California Design 1930–1965: Living in a modern way*, which presented over 250 pre-and post-war Californian objects to almost 60 000 attendees between 2 November 2013 and 4 February 2014. This exhibition generated 15 464 event-related visitor nights
- Queensland Museum's exhibition *Afghanistan: Hidden Treasures from the National Museum, Kabul*, from 5 September 2013 to 27 January 2014, attracting 48 000 attendees
- the State Library's presentation of *Our Dreaming —animating country*, a series of exhibitions, workshops and events to showcase Queensland's vibrant Aboriginal and Torres Strait Islander stories through animation
- the Queensland Performing Arts Company's presentation of The Netherlands Royal Concertgebouw Orchestra and the National Theatre Great Britain's production of *Warhorse*.



A key achievement for 2014 has been the release of the Cultural Precinct master plan. Balancing Arts and culture with new development opportunities, such as five-star hotel and dining precincts, the master plan articulates a vision for the precinct that blends Queensland's outdoor lifestyle in an area rich in Arts and culture.

Case study—Cultural Precinct master plan

The Cultural Precinct master plan forms an integral part of the *Cultural Precinct strategy 2013–2015*.

Master planning commenced in September 2013, with public consultation on the draft master plan occurring throughout May and June 2014. A final master plan will be produced during the latter half of 2014.

The master plan is based on audience research, needs and demand analysis, and is informed by the findings of research into the performing arts venue needs of Brisbane and collection storage requirements for the Arts Statutory Bodies.

There are four fundamental themes on which the master plan is based:

- boosting cultural tourism by providing additional Arts and cultural facilities to serve the city's future (e.g. a new performing arts theatre and an expanded museum offer)
- significantly improving connectivity throughout the precinct, particularly pedestrian connections across Melbourne Street to better connect with the South Bank Parklands and the CBD
- driving innovation and learning through opportunities that include a learning centre in the Queensland Art Gallery and a reinvented Sciencentre for the Queensland Museum
- improving outdoor public spaces throughout the precinct for events and festivals, along with providing new dining and retail opportunities.

Key outcomes sought through the draft master plan include increasing visitation to the site from an estimated 4.7m in 2013–14 to 7.5m per annum; doubling the leasable area for dining and retail areas to more than 6000 square metres; providing events capacity for 50 000 people per night; and using commercial development opportunities to offset part of the cost of implementation.

Case Study—Australian Festival of Chamber Music

The Australian Festival of Chamber Music (AFCM) is held annually over a period of ten days in July and August in Townsville, North Queensland. Entering its twenty-fourth year in 2014, AFCM has developed an international reputation for its distinguished artists and innovative programming across a range of chamber music styles.

In 2013 AFCM achieved major event status and secured funding through TEQ. To capitalise on its national profile and deliver on its cultural tourism objectives, the festival has worked with TEQ and other stakeholders to develop and implement targeted cultural tourism marketing campaigns.

Key tourism outcomes include:

- A total of 14 576 visitor nights were generated as a result of the Festival—76% of which were in Townsville
- The average attendee spent 7 nights away from home, spending on average 5.2 nights in Townsville
- Visitors also generated 14 756 event related visitor nights with 11 058 of their nights spent in Townsville
- Spending directly related to the 2013 festival was estimated at \$2.32m
- On average, event attendees spent \$1 125 per person
- The 2014 AFCM includes a range of Tropical North Queensland (TNQ) holiday packages for promotion through the Australian Holiday Centre.

Cultural tourism readiness

Arts Queensland is working with industry partners to broker and develop connections between the arts and cultural sector and the tourism industry in regional communities throughout Queensland.

Resources have been realigned to enable deeper engagement with local governments and regional tourism bodies to identify and respond to locally driven cultural tourism opportunities. Examples of this work to date include:

- establishment of a dedicated team of Partnerships Managers assigned client management responsibilities aligned to the 13 tourism destinations.
- contribution to the development of DTPs to identify opportunities for inclusion of cultural tourism experiences where relevant to local destinations.
- regular liaison with TEQ Destination Directors and RTOs, including inviting their participation in regional engagement related to delivery of Arts for all Queenslanders.
- ongoing support for the development and submission of cultural tourism proposals to the competitive funds delivered through the Arts and Cultural Investment Framework and the Regional Arts Development Fund.
- collaboration with local government to develop regional arts and cultural snapshots that incorporate key arts and cultural contacts, list local assets, and identify cultural tourism, infrastructure and other arts and cultural priorities and opportunities for future development and investment.

Cultural tourism offerings

Investment in cultural tourism offerings is occurring through a number of key programs including:

- the Super Star Fund with key performance outcomes including visitors attracted, visitor nights generated and expenditure generated by the event. Events funded through the Super Star Fund include QPAC's *Clancestry*, Queensland Theatre Company (QTC)'s production of *Macbeth*, and Queensland Ballet's season of MacMillian's *Romeo and Juliet* with both seasons exclusive to Queensland. QTC's *Macbeth* highlights the value of this investment with performances attracting more than 17 000 ticket sales—the highest selling QTC show in over two decades. The Queensland Ballet's production of *Romeo and Juliet* broke a 54-year box office record, exceeding \$1.1m and attended by more than 15 000 people across eight performances.
- the Organisations Fund which supports organisations in the small to medium sector to grow their arts and cultural offerings across Queensland. Organisations like Circa and the Australian Festival of Chamber Music have demonstrated their ability to attract visitors to Queensland and enhance the state's reputation for producing and performing quality, unique arts and cultural experiences (case study below).
- Arts Queensland also supports the growth of cultural tourism offerings through recurrent funding of festivals—including Woodford Folk Festival, Australian Festival of Chamber Music, Brisbane Festival and Queensland Music Festival. A strong program of festivals year-on-year provides cultural visitors with both a unique experience and an ongoing reason to continue coming back to Queensland.
- the Woodford Folk Festival is a prime example of how festivals create return visitors, with more than 92% of attendees surveyed indicating they would be likely or very likely to return to the Festival. The Festival also demonstrated its tourism value with an aggregated attendance of more than 122 470 and generating an economic impact of \$21.14m to Queensland.

Showcasing authentic Indigenous Arts experiences

Industry partnerships showcase the work of Indigenous artists and offer cultural tourists an authentic experience. This includes:

- Clancestry: A Celebration of Country—an Indigenous festival featuring performances, events and forums—was staged at QPAC on 18–23 February 2014, in partnership with a number of organisations, including the Queensland Indigenous organisation Nguin Warrup. With more than 17 500 people attending this event, close to 600 employment opportunities were provided for Queenslanders.
- Cairns Indigenous Art Fair (CIAF) which was transferred out of government to run as a not-for-profit company limited by guarantee in 2014. The fifth CIAF event was held in Cairns on 24–27 July 2014 and built on the success of events to date, which includes \$2.4m in direct sales and more than \$5.6m in tourism expenditure.
- Laura Festival—a biennial event which presents cultural and traditional dance of first nations peoples of the Cape York region, through the Backing Indigenous Arts initiative. The 2013 event saw 18 traditional dance groups participating, presenting 45 performances, with 360 emerging artists participating and approximately 4000 people attending. The event obtained substantial national and international media coverage—including film crews from Russia and *Australian Geographic*.

Supporting Indigenous tourism

The Department of Aboriginal and Torres Strait Islander and Multicultural Affairs (DATSIMA) has been working in partnership with QTIC to increase workforce participation and skills through employment and training of Aboriginal and Torres Strait Islander people in the tourism sector. The QTIC Tourism Indigenous Employment Champions Network supports tourism employers in engaging and managing Indigenous employees. This work has resulted in 51 Aboriginal and Torres Strait Islander Queenslanders gaining work and 39 receiving training in the tourism sector.

The network, the first of its kind in Queensland, aimed to increase operators' awareness of how to encourage and maintain increased participation of Indigenous Australians within the mainstream tourism industry. Together with business champions, QTIC developed a range of resources for tourism operators, presented at numerous industry conferences, facilitated industry forums, provided tourism industry career path information to Indigenous students and job seekers, and identified Indigenous employment placements within the industry.

Destination competitiveness is also part of the motivation for QTIC to encourage and support the development of Indigenous tourism businesses and employment. With the Indigenous Employment Champions Network, much has already been achieved but more can be done to take advantage of the opportunities. Collaboration between employers, Indigenous communities, training providers, business mentors and government agencies can deliver outcomes through tourism.

The Queensland Government is working to increase Indigenous participation in tourism. This has included providing advice and in-kind support to deliver priority actions under relevant strategic plans such as the *Queensland Ecotourism Plan 2013–2020*, and the *Arts for all Queenslanders strategy*.

Guided by the Queensland Aboriginal and Torres Strait Islander *Economic Participation Framework*, DATSIMA will be leading actions in the 2014–15 financial year, to promote tourism as a career, link existing Indigenous businesses, and assist Aboriginal and Torres Strait Islander people to take up tourism related training and attain employment in the sector.

TEQ continues to support established Indigenous tourism operators in Queensland in improving their product delivery, marketability and long-term business sustainability through a range of development and promotional initiatives.

In particular, the Queensland Government is supporting Indigenous Business Australia's (IBA) Indigenous Tourism Champions Program, working with approved Queensland Indigenous tourism operators with one-on-one mentoring from industry specialists, and linking them into Tourism Australia's marketing and industry development activities.

The Queensland Indigenous Tourism Group's role is to increase cross-government and government/industry cooperation, information-sharing and collaboration on Indigenous tourism issues, with a particular focus on:

- increasing workforce participation
- improving education, training and productivity outcomes
- promoting tourism as a career
- increasing the business capacity and ability of Aboriginal and Torres Strait Islander owned businesses to participate in cultural and mainstream tourism
- increasing the number of Aboriginal and Torres Strait Islander owned businesses within the tourism industry.

The *Queensland Ecotourism Plan 2013–2020* recognises incorporating Indigenous elements into ecotourism experiences will create not only a key point of difference for ecotourism in Queensland but also valuable tourism business opportunities for Traditional Owners. The plan identifies four specific actions around guide training and certification, and new Indigenous tourism product development to support the ongoing development of Indigenous ecotourism opportunities in Queensland.

TEQ is the Queensland representative on the National Indigenous Tourism Group (ITG). The ITG has representation from all Australian states and territories, and is chaired by the respected Aboriginal leader Dr Aden Ridgeway, under the auspices of Tourism Australia and the Tourism Division of the Australian Trade Commission (Austrade). The ITG coordinates Indigenous tourism policy and development issues across the country, and provides input to the work of the Australian Standing Committee on Tourism and the national Tourism Ministers' meeting.

Working together with traditional owners to protect Cape York

Following a formal handover on 27 November 2013, the Queensland Government now jointly manages with Aboriginal and Torres Strait Islander communities seven national parks in south-east Cape York Peninsula, ensuring these communities have a say in protecting the region's natural areas, and waterways and economic development.

More than 350 000 hectares of national park are now jointly managed via two separate land grants with the Cape Melville, Flinders and Howick Islands Aboriginal Corporation, and the Buubu Gujung Aboriginal Corporation.

DNPRSR is working closely with the communities to provide sustainable public use and enjoyment of the Cape York Peninsula Aboriginal land national parks, and to protect the wildlife, habitats and cultural landscapes of these special parks, including important feral pest and weed control, and wildfire prevention.

In a key initiative for the region, DNPRSR is leading delivery of the nest to ocean program, a \$7m program to reduce feral pig predation of marine turtle nests in Cape York, in collaboration with the federal Department of the Environment, other partner agencies and community groups. The government has committed to working with local Indigenous communities, land trusts, natural resource management groups and other organisations to deliver the program, which will benefit populations of olive ridley, flatback, loggerhead, green and hawksbill turtles as well as other native species subject to feral pig predation.

War memorials drive journeys

War memorials play an important role in commemorating Australia's involvement in the First World War and in demonstrating the pattern of Queensland's military history. Queenslanders and tourists can now visit some of the many war memorials scattered throughout our state using specially developed driving itineraries.

As part of a whole-of-government approach to celebrating the ANZAC centenary, the World War 1 memorial journeys provide an opportunity for Queenslanders and tourists to visit memorial sites and reflect on the ANZACs and service men and women who served in World War 1, as well as those who served in other conflicts and peace operations in the past 100 years.

Thirteen drive journeys and 90 war memorials (76 of which are on the Queensland Heritage Register) can be accessed through queenslandholidays.com.au to encourage drive travellers to incorporate the sites and journeys into their travel plans.





To do...

- Implement the *Queensland Ecotourism Plan 2013–2020*
- Progress ecotourism opportunities on protected areas
- Continue permit-streamlining initiatives for commercial tourism in parks and forests
- Continue parks and forests capital works prioritised for tourism and visitor use
- Deliver the Queensland national parks consumer-oriented web presence and social media strategy
- Progress implementation of Gateway Visitor Centres concept master plans
- Complete a strategic events framework for events in or near national parks
- Progress alternative delivery of online bookings for Queensland national parks
- Progress development and release of a suite of mobile optimised apps, based on places on the Queensland Heritage Register
- Ongoing effort to support Indigenous employment and business development.



Deliver quality, great service and innovation

State of the Industry 2014



'As part of the Queensland Government's ambitious program of training reforms, we are committed to investing in the skill areas that will provide employment opportunities and drive growth, including in the key tourism sector. We will continue to work with the tourism industry to build a strong, vibrant and sustainable tourism sector.' – **The Honourable John-Paul Langbroek MP, Minister for Education, Training and Employment**

Highlights

- \$32.16m investment to provide training to 18 034 students in tourism and hospitality
- \$175 000 provided for language and cultural awareness, targeting Asian languages and cultures, and other emerging markets
- Piloted a new registered trade skills pathway for 50 students in commercial cookery to support training arrangements for industry's mobile and casual workers
- Lowest WorkCover premiums in Australia

It is essential to deliver a quality experience to visitors. This requires a focus on creating standards of service that make visitors talk positively about their experiences, and hopefully to share those experiences with others by word of mouth or through social media and other channels. Critical to this is ensuring industry has the committed and skilled workforce, and necessary workplace reforms, to provide a 24/7 high-quality customer service.

Queensland quality service framework

Destination Success: the 20-year Plan for Queensland Tourism foreshadows the development of a Queensland Quality Service Framework 'to guide a systematic approach to raising service standards across Queensland, develop a framework that brings together all existing partners, identifies any gaps and outlines priorities for the future—this framework will be developed with widespread engagement across the services sector'.

As an initial step in developing this framework, an extensive study of social media reviews of Queensland product has been commissioned. This review provides us with an evidence base to help understand what customers expect in terms of a quality experience and how well Queensland product is delivering. With this information we will be well placed to focus the framework on building our strengths and on the specific areas where improvement is needed.

Consideration of this research at the 2014 *DestinationQ* Forum and, in particular, the 'Good to Great to One-of-a-kind' approach will also provide focus to this work by asking operators to consider what would be needed to make their product 'One of a kind'. This approach provides particular emphasis on how the customer feels about the experience and is therefore integral to providing quality customer service.

Creating opportunities for skills growth

In 2013–14 QTIC's workforce development plan was used to inform the work carried out under the *DestinationQ* partnership agreement, and to provide training advice and industry intelligence to the Queensland Government. QTIC has been strongly focused on these skill and labour needs of the future. Over this time, through its role as the Industry Skills Body (ISB) for the Department of Education, Training and Employment (DETE) and QTIC's networks of training organisations and employers, QTIC was able to continuously identify priorities, coordinate initiatives and address a range of labour and skills issues on behalf of the Queensland tourism and hospitality sectors.

In 2013–14, the state government provided significant investment into the tourism and hospitality industry, aimed at developing the capability of the workforce. Activities supported by DETE also align with actions identified in *DestinationQ*, including:

- as at 30 June 2014, \$32.16 m has been invested for training of 18 034 students in tourism and hospitality, to support a qualified workforce
- \$175 000 was provided for language and cultural awareness, particularly focusing on Asian languages and cultures, and other emerging markets to enhance the vocational education and training (VET) system capability
- \$125 000 to increase awareness and confidence of small to medium tourism enterprises to employ more Indigenous people
- \$125 000 to implement and promote best-practice models to assist industry in their workforce recruitment and retention strategies. Accommodation, adventure tourism, food and beverage, and tour operators are encouraged to access the *Guide to best practice in tourism and hospitality*, developed by the QTIC
- \$697 980 was allocated to pilot a new registered trade skills pathway for 50 students in commercial cookery. The pilot was designed to assist the industry to develop trade training arrangements to support mobile and casual workers
- \$300 000 was allocated to QTIC to provide advice to government on industry training requirements and assist industry to address key workforce challenges.

Identifying our VET priorities

‘Great skills. Real opportunities.’ is the Queensland Government’s five-year reform action plan that aims to ensure students are able to access training that leads to real employment outcomes, while growing Queensland’s qualification profile and economic prosperity. The reforms focus on:

- introducing a contestable training market from 1 July 2014
- supporting the entitlement of individuals to access a minimum level of training
- increasing choice for individuals and industry by providing funding subsidies in areas of government priority accessible through both public and private training providers
- a training system that can respond to industry demand in areas of government priority.



A key initiative in the VET reform has been the establishment of the Ministerial Industry Commission. In March 2014, the commission, charged with engaging with industry to establish priorities for the VET system, released its inaugural *Annual skills priority report* to inform our government priorities for 2014–15. The report identifies key trends across the Queensland economy, pinpointing occupations that are growing and the skills required to fill them. For tourism, the results of the industry and employer engagement and consultation showed that transferability and portability of skills and experience are key elements of sustainably managing the tourism workforce. Further, industry identified that skills and qualification recognition systems were critical to support mobility, innovation and the building of learning networks (informal and formal) in the tourism industry. A recognition system would support the workforce’s demand for skill sets that provide value-add to qualifications, and support new and emerging skill needs across the industry.

Industry consultation also suggested the following occupations are expected to show the greatest level of excess demand over the next five years:

- bakers
- chefs
- cooks
- outdoor adventure guides (specifically with Asian language skills)
- middle and senior management positions in hospitality and accommodation.

Training in Chinese and Japanese languages and digital technologies also remained critical skills development areas to cater for the changing needs of our visitors.

On 9 June 2014, the Minister for Education, Training and Employment released Queensland's 2014–15 annual VET investment plan. The plan, guided by the commission's priority report, outlines all government-funded qualifications made available from 1 July 2014, with the majority of investment managed through a demand-driven skills market. The tourism and hospitality industry will be supported through a range of training strategies designed to build the skills and qualifications profile of the industry's workforce:

- the Certificate 3 Guarantee provides individuals with a subsidy to gain qualifications at employment entry level in a choice of ten industry-related qualifications
- the User choice 2010–2015 program supports qualification attainment through apprenticeship and traineeship pathways
- Year 12 graduates can access fee-free training in priority hospitality qualifications
- senior school students will also be able to undertake approved qualifications in tourism and hospitality while still at school through the VET in schools program, as well as a number of school-based apprenticeship and traineeship qualifications
- the Higher level skills program will assist individuals to gain skills through priority skills sets or qualifications at Certificate IV level and above.
- through the *Industry partnerships strategy*, industry has the opportunity to develop short-term interventions aimed at addressing areas of potential skills market failure. The partnership will provide potential for industry to identify a gap in the skills market and seek funding that supports co-ordination, management and implementation of industry interventions which will enable individuals to access and complete their training

- the *Indigenous training strategy 2014–18* is designed to increase participation and qualification attainment by Aboriginal and Torres Strait Islander people. The program is able to provide a range of training supports which will assist in participation and completion, where individual circumstance, environmental and/or systemic factors have previously acted as barriers
- a key component of the strategy is the joint support from DETE and DATSIMA through the Strategic Indigenous VET Partnership. Complementing the investment through skilling strategies such as the Certificate 3 Guarantee, the Strategic Indigenous VET Partnership will see up to \$1m a year over the next four years invested in accredited training and assessment services that will improve employment outcomes for Aboriginal and Torres Strait Islanders across the state. Priority will be given to programs and initiatives in skill shortage areas and the Queensland Government priority sectors—tourism, agriculture, resources and construction. Initiatives and programs will need to show value for money and clear pathways to employment.

Working nationally to boost employment

Labour and skills shortages impact industry's capacity to provide consistently high service quality. Tourism workforce development requires collaborative effort by the state and federal governments, and industry. The Queensland Government continues its work with the Commonwealth Government on nationally relevant workforce initiatives to boost employment in the sector.

This work through the Tourism Ministers Meeting and the Australian Standing Committee on Tourism has seen progression of pilot initiatives such as the Tourism Employment Plan (TEP) for TNQ to deliver practical measures to address labour and skill shortages in the region and link tourism businesses with existing and prospective programs.

The development of the TEP in Cairns and Port Douglas has seen a 'My paradise customer service training program' (My Paradise) established to ensure service quality and regional knowledge is consistent among both the permanent and transient workforce. There has been strong industry involvement in development of the TEP, with TTNQ taking full responsibility in delivering My Paradise, in partnership with Tropical North Queensland TAFE.

Nationally, the tourism industry is seeking to have 'tourism and hospitality' work classed as eligible work to access a working holiday visa. Tourism ministers have been working at the national level seeking expansion of the various visa requirements so they better address the skills and labour shortages in the visitor economy. In support of the industry, this includes expansion of the second-year working holiday subclass 417 visa to include consideration of tourism employment within regional areas.

Queensland, with other states, has also been working at the national level to address workplace reform issues. The draft *Tourism 2020 strategic plan for 2015–2020* identifies as a game-changer; the development of a more flexible industrial relations system, including penalty rates, that recognises visitor expectations that tourism and hospitality services operate within a modern 24/7 visitor economy.

A competitive visa system for visitors is critical to achieve the desired growth. Particularly in the Chinese market, Australia needs to maintain its competitive advantage in the face of significant improvements in visa processing by other destinations. QTIC has been working consistently with the National Tourism Alliance (NTA) to keep the federal government focused on this priority.

Supporting workplace reforms

The Queensland Government is committed to growing a four-pillar economy based on tourism, agriculture, resources and construction, and to getting the state's finances back on track. Significant progress is being made, state-wide and locally, but we are determined to do more for all Queensland businesses, including tourism small and medium enterprises (SMEs).



As part of this commitment, the government has made changes to Workcover. From 1 July 2014, the Queensland workers' compensation scheme will have the cheapest premium rate in the country for businesses and the strongest safety net for workers. If you are a Queensland business owner, you will be able to take advantage of the following:

- the average premium rate is reducing by 17%
- over 93% of Queensland businesses are having their claims history wiped clean under a simpler premium model
- greater flexibility to pay the premium by instalment.

This means that an extra \$1b is being put back into the pockets of Queensland business owners over the next four years.

We want to be the best place in Australia to do business, and that means we have to have the best, most competitive business environment and be fair to workers. With these changes, Queensland now has the lowest average premium rate in Australia, making it easier for tourism SMEs to manage costs and grow their businesses. The average premium rate for businesses will drop from \$1.45 per \$100 of wages to \$1.20 per \$100 of wages.

Businesses can also gain access to a prospective worker's previous claim history or injuries by making an application to the Workers' Compensation Regulator. The penalties for fraudulent claims have also been increased.

Queensland workers will still be protected and able to get financial assistance under the statutory no-fault scheme. Queensland is also the only state to cover all journey claims to and from work, and our return-to-work rate of 95.7% is one of the best in the country.

More information about these changes can be found on www.justice.qld.gov.au/workerscompchanges and www.workcoverqld.com.au/premium.

Understanding the industry's industrial relations needs

Destination Success contains actions which require engagement at a national policy level, including improvements to the current industrial relations provisions that adversely affect tourism.

QTIC has been collaborating with key industry sector associations and the Department of Justice and Attorney-General (DJAG) to maintain the momentum for change and achieve outcomes that will match a modern 24/7 industry with a flexible industrial relations system.

DJAG has been working to develop a better understanding of some of the workplace relations issues in the tourism industry. Helping to ensure industry is better informed by providing research, data and information will help to promote a better understanding of the complex issues involved in this space, which in turn will contribute to building capacity in the tourism sector.

DJAG has been working closely with QTIC and industry representatives in developing its research through a Tourism Industry Reference Group. The issue of the impact of penalty rates has been investigated, including a consideration of the demographic features of the tourism workforce, evidence of social disability associated with weekend work and the impact of employment and profitability in the industry.

The Attorney-General and Minister for Justice also continues to advocate for workplace reform relevant to the tourism industry in national forums.

A better industrial relations system would be good news for employees who seek opportunities in tourism and good news for business competitiveness.

Supporting digital innovation in the industry

The existing body of research on innovation in the tourism industry confirms that tourism businesses are innovative. Customers of tourism products are frequently early adopters and demand greater levels of technological innovation from their sellers. This heightened demand drives tourism businesses to innovate in a reactive pattern as they try to keep up with their customers and overtake their competitors.

However, the reactive nature of innovation in the tourism industry makes it difficult for the industry to innovate systematically. The diverse nature of tourism businesses further complicates the industry's approach to innovation, as they vary in capability and target specific customer segments. There is significant opportunity to improve the coordination of innovation within the tourism industry and create a more systematic approach to innovation.

Together with the Department of Science, Information Technology, Innovation and the Arts (DSITIA), DTESB delivered a Partners in Digital Productivity (PiDP) forum in March 2014 to foster collaboration and build linkages between the Information and Communication Technology (ICT) and tourism industries in Queensland. The forum brought ICT representatives together with tourism operators to discuss the challenges they face and workshopped potential solutions to improve productivity.

The PiDP forum outcomes are now being taken forward by a working group of engaged ICT representatives and tourism operators eager to innovate. Projects currently being investigated by the working group include a method for pre-arrival visitor engagement and 'spring clean' campaign to promote the importance of business improvement and up-skill tourism operators in the off-season.

To do...

- Provide the tourism and hospitality industry with a range of training supports through the activation of the VET reforms and the annual *VET investment plan*
- Finalise research on impacts of penalty rates on tourism businesses
- Digital Champions continued
- Continue to advocate for workplace reform
- Develop a quality service framework.



Target a balanced portfolio of markets

State of the Industry 2014



'Tourism and Events Queensland is committed to marketing Queensland's world-class destinations to a national and international audience in close collaboration with Tourism Australia, regional tourism organisations and industry partners.'— **Mr Stephen Gregg, Chairman Tourism and Events Queensland**

Highlights

- A collaborative approach to building strong destination brands throughout Queensland
- A targeted approach to emerging international growth market opportunities while maintaining activity in traditional international markets
- Activity underpinned by TEQ's 2020 strategic marketing plan

Maintaining a balanced portfolio of markets is vital to ensuring Queensland and its suite of destinations are best positioned for growth in an environment of high competition and rapid change. Through targeting a combination of domestic, intrastate and international visitors, activities are focused on ensuring a collaborative approach to maintaining existing markets and securing growth from new markets.

TEQ's 2020 strategic marketing plan, finalised in 2013, sets out the guiding principles to underpin marketing activity and its contribution to achieving the target of \$30b in annual overnight visitor expenditure by 2020. A key principle is that Queensland will have a balanced portfolio of source markets. The document states:

'Strategically marketing to the range of source markets will help to increase visitor expenditure in ways that are most important to the destinations, evening out peaks and troughs in visitor expenditure, extending shoulder seasons and building demand during other slow times like weekdays in short-break destinations and weekends that rely heavily on business visitation' (2020 Strategic tourism marketing plan, p. 19, Tourism and Events Queensland)

Through a comprehensive international network, TEQ's global approach to tourism marketing is executed within the 'One voice' approach under the *There's nothing like Australia* brand, amplifying the position of Queensland and its destinations across all communication platforms.

A strong strategic focus on destination marketing is supporting a suite of 13 world-class destinations, each with their own unique brands. To ensure a coordinated approach, TEQ has worked in partnership with RTOs on a destination tourism planning framework outlining priorities for tourism and event marketing towards 2020.

In 2013–14, TEQ activity generated \$190m worth of publicity value for the state. A strong focus on innovation and digital marketing is being maintained with Queensland having more than 1m Facebook fans and 58 000 Twitter followers. There have been more than 2m views of Queensland destination content on TEQ's YouTube channel.

Queensland adopts an agile and responsive approach to industry needs; for example, in disaster recovery periods. Following Cyclone Ita, TEQ partnered with Wotif.com on a campaign to let potential holiday-makers know that Queensland tourism operators were open for business and ready to welcome visitors for the Easter and ANZAC Day long weekends in 2014. The 'Pack your bags, Queensland's ready to holiday' campaign included digital, radio and print advertising, as well as social media activity.

A suite of world-class destinations

TEQ's strategic focus is to build strong Queensland destinations, which aligns with the *DestinationQ* objectives and the overarching *Destination Success*. The destination-focused campaigns are designed to build strong brand awareness and positive consumer perceptions, and focus on increasing exposure to target markets and boosting visitation to the state.

In the past year, joint domestic campaigns were delivered for Brisbane, Bundaberg, Gold Coast, Outback Queensland, Southern Queensland Country, Southern Great Barrier Reef, Sunshine Coast, Townsville North Queensland, Tropical North Queensland and the Whitsundays. In 2014, TEQ also undertook brand positioning work for Townsville North Queensland and Mackay in partnership with their respective regional tourism organisations (RTOs). The new Townsville and Mackay brands are now being used in event, marketing and publicity activities. Examples of some key destination campaigns are provided below.



Recent campaign activity

Gold Coast

The second instalment of the blockbuster Gold Coast 'And Action!' campaign initiative, designed to amplify the destination's 'Famous for fun' holiday experiences, screened in October and November 2013, heightening the energy and excitement of a Gold Coast holiday through a series of television, digital, outdoor and print ads. The campaign, in partnership with GCT, Gold Coast Airport and Jetstar, targeted key interstate markets of Sydney and Melbourne, as well as Cairns and Adelaide with competitive Jetstar airfares and holiday packages.

In February 2014, 1.2 million copies of a Gold Coast magazine supplement were produced and distributed through News Limited newspapers in Brisbane,

Sydney and Melbourne showcasing the wide range of experiences consumers can have on the Gold Coast.

Building on this momentum, the third phase of the 'And Action!' campaign launched in June 2014, enticing Australians to warm up with a winter holiday on the Gold Coast. TEQ partnered with GCT and local operators to promote competitive holiday packages on offer for travel from June to September 2014. The campaign targeted the key interstate markets of Sydney and Melbourne as well as the important drive market of South-East Queensland with promotions featuring across television, radio and online.

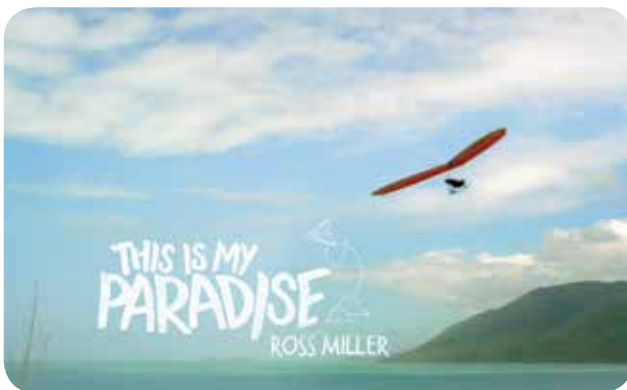


Southern Great Barrier Reef



The second phase of the Southern Great Barrier Reef 'Where great begins' campaign aims to entice Queenslanders to experience the awe-inspiring natural beauty of the destination. The campaign builds on the success of the inaugural 'Where great begins' campaign, developed in 2013, which collectively promotes the Capricorn, Bundaberg North Burnett and Gladstone tourism regions, and has forged a strong partnership between TEQ and the three RTOs. Campaign creative appearing in May and June in Brisbane and regional Queensland featuring across billboards, buses, television, in print, on radio and online; designed to showcase the accessible tourism experiences of the Southern Great Barrier Reef, just four hours' drive from Brisbane. The campaign also saw three high-profile social media influencers travel to the Southern Great Barrier Reef to explore the destination and share their experiences with a collective audience of more than 418 000 potential visitors.

Tropical North Queensland: This is my paradise



Following the success of last year's 'One day in paradise' campaign, TEQ and TTNQ reached out to passionate TNQ locals, inviting them to share their story and knowledge of the region for the chance to become the face of this year's 'This is my paradise' national tourism campaign.

Three TNQ locals were selected and their stories captured on film. These short films aired on television, online and across social media, targeting Brisbane, Sydney and Melbourne from 27 April to 31 May 2014. Sunlover, Qantas and Escape Travel offered holiday deals to convert awareness into sales. To kickstart the campaign, five digital influencers travelled throughout the region sharing their experiences of paradise on Instagram, using the campaign hashtag #ThisIsMyParadise.

Outback Queensland: Eventures and the promise



The Outback Queensland 'Eventures' campaign highlights iconic outback events as a way of motivating visitors to travel to Outback Queensland and increase expenditure to the region.

The campaign ran from December 2013 to June 2014 across regional TV, press, online and PR, targeting consumers both intrastate and interstate. 'Eventures' is complemented by the social media-driven 'Outback promise' program, which also highlights the various events in Outback Queensland and invites consumers to make their promise to visit the Outback via a Facebook app.

Southern Queensland Country Autumn 2014 campaign



In March 2014 TEQ partnered with SQCT to launch the destination's largest ever marketing campaign, showcasing the best tourism experiences and seasonal produce it has to offer. In the market from 9 March to 24 May 2014, the campaign targeted Brisbane visitors, encouraging travel to Southern Queensland Country during its distinct Autumn season via television, outdoor, digital, print and online activity. The campaign also incorporated 'Autumn on James', a three-day event showcasing the region in Brisbane's James Street precinct via activities such as a media dinner, farmgate stalls, cooking demonstrations and farmers' markets.

A new campaign was launched in May 2014 encouraging travellers to take a break from the city and head to Southern Queensland where 'somewhere in the country... it's snuggling season'. The campaign leveraged the destination's winter weather to encourage romantics to gather around the fireplace, savour fresh produce and enjoy intimate culinary experiences as part of the broader strategy to position the destination as a superb season escape.

Whitsundays: Every shade of perfect



The idyllic tourism experiences of the Whitsundays were the feature of a new tourism campaign in June 2014, launched by TEQ in partnership with WMDL. This was the first time an Australian tourism organisation filmed a campaign entirely on a smartphone. The 'Every shade of perfect' campaign showcased the unrivalled natural beauty of the destination, encouraging Australians to experience their own perfect Whitsundays escape. The campaign featured on television in the key visitor markets of Sydney, Melbourne and Brisbane, online and in flight on Qantas domestic routes through June and July 2014.

Brisbane any day



TEQ partnered with Brisbane Marketing in June 2014 to encourage Sydneysiders to embrace their desire for a Queensland holiday and to break the winter blues with the second instalment of the 'Give me Brisbane any day' campaign. The marketing blitz featured on television, radio and online. The campaign followed the success of the 'Give me Brisbane any day' summer campaigns, which were seen online more than 29 million times.

International activity

Commitment to established source markets was maintained, while capitalising on emerging growth market opportunities across eastern and western hemispheres. Following a strategic review in 2013–14, TEQ has increased its presence in China with a dedicated trade office in Beijing and developed Singapore as the South and South-East Asia hub responsible for Singapore, Malaysia and Indonesia, along with India and the Middle-East markets.

Activity throughout 2013–14 included tactical marketing campaigns in the key source markets of New Zealand, United States of America, Germany, United Kingdom, Singapore, China, the Middle East, Japan, India, Korea, Taiwan and Hong Kong.

TEQ worked collaboratively across international markets using the 'One Voice' approach and *There's nothing like Australia* branding campaign partnerships were conducted with key airlines including Qantas, Singapore Airlines, Scoot, Air AsiaX, Malaysia Airlines, Jetstar Japan, Cathay Pacific, Korean Air, Eva Airways, China Airlines, Emirates, Delta, Air New Zealand, China Southern and China Eastern.

During 2013, mobile phone applications were released for use by Chinese-speaking travellers as an information tool when on location in Queensland. A major focus in the China market has been working with key partners, including Tourism Australia, select agents and key airlines to drive incremental growth from the free independent traveller (FIT) market segment.

Highlights:

Best Jobs in the World global youth campaign

The Best Jobs in the World global youth campaign that TEQ undertook in partnership with Tourism Australia, state tourism organisations and DNPRSR was an example of international collaboration. The global campaign was designed to raise awareness and grow the youth market for those aged between 18–30 years to Australia. The campaign resulted in 100 000 subscribers to a Queensland database, 10 000 video entries for the Queensland job, and more than \$4.5m in publicity for Queensland.

Queensland on tour

During 2013–14, TEQ hosted five 'Queensland on tour' sales missions in the major source markets of: China, Japan, India, New Zealand, and the United Kingdom and Nordic region. Across the five events, over 150 Queensland tourism operators have travelled overseas to meet with more than 2000 travel trade (including distributors, retailers, wholesalers) and media. TEQ led these tourism trade missions through facilitating meetings, hosting networking events and educational seminars. A Queensland on Tours Europe for September 2014 was also planned.

DERTOUR

DERTOUR 2014 involved 60 German travel agents touring Queensland, culminating in a trade event in Cairns from 17 to 21 June 2014. TEQ and TTNQ partnered with leading German travel wholesaler DERTOUR to run the training workshop and mega-familiarisation in TNQ. The five-day event showcased Cairns and Great Barrier Reef tourism products and experiences that feature in DERTOUR's 2014–15 holiday brochure.

The event armed travel agents with first-hand knowledge to better sell the destination to potential German visitors. With support from Qantas, Emirates and Tourism Australia, German travel agents visited Cairns for the workshop, following familiarisations on the Sunshine Coast, Fraser Coast, Whitsundays and Cairns, and Great Barrier Reef region, all coordinated by the RTOs.

The event followed a recent marketing campaign blitz in Germany promoting Queensland's natural assets such as the Great Barrier Reef. The campaigns showcased destinations popular with Germans as places to enjoy some of Australia's best natural experiences and adventures. Destinations included: the Sunshine Coast, Fraser Coast, Whitsundays and the Tropical North—including the Great Barrier Reef.

Jean-Michel Cousteau

Explorer and environmentalist Jean-Michel Cousteau is the face of a new tourism campaign announced in June 2014 encouraging North American families to follow in his footsteps and explore the Great Barrier Reef. TEQ has partnered with Stella Travel Services, and Jean-Michel Cousteau's Ocean Futures Society, in conjunction with TTNQ and Air New Zealand, to promote a series of Jean-Michel Cousteau endorsed Queensland itineraries promoted via Stella Travel Services in the United States of America. The campaign featured publicity, print advertising, digital, trade and social media activity.

Bringing the world to Cairns and the Gold Coast

The Australian Tourism Exchange 2014 (ATE14) was hosted in Cairns and showcased all that the region has to offer. The event is the largest business-to-business tourism trade event in the southern hemisphere. The 2014 five-day program was delivered by Tourism Australia in partnership with TEQ and TTNQ. For the first time in the event's 35-year history, ATE14 was hosted in a regional destination. Over 590 buyer delegates from 36 countries met with 1200 Australian sellers at the Cairns Convention Centre from 11 to 15 May 2014. TEQ offered pre and post touring familiarisations within Queensland to enable ATE14 delegates to experience the state beyond ATE14. TEQ delivered 50 familiarisations in total, hosting 339 delegates. The estimated economic benefit to the Cairns region was \$10m.

Overall satisfaction with ATE14 reached a record high this year following the Cairns event, with 100% of the buyers and 99% of the sellers who responded to the survey expressing their satisfaction with the event.

The inaugural Corroboree Greater China 2014 took place on the Gold Coast from 23–28 June 2014, bringing together 120 of Australia's leading tourism operators, key trade and media, with 270 Australian specialist agents from Mainland China, Hong Kong and Taiwan. Corroboree Greater China 2014 was hosted by Tourism Australia, in partnership with GCT and TEQ.

This event provided a professional forum for Australian sellers to train qualified Australian specialist agents from Mainland China, Hong Kong and Taiwan, and strengthen specific product knowledge. In addition, through familiarisation visits, the agents had first-hand experience with quality Australian tourism products designed to enhance their ability to promote and sell the products to Chinese travellers.

Taking partnerships to the next level

Commercial partnerships with industry are an important focus for TEQ as it works to promote Queensland's destinations and experiences across Queensland, Australia and globally.

In July 2013, TEQ and Qantas entered into a three-year \$12m cooperative marketing agreement to promote the state's tourism destinations to the world. The agreement is the largest tourism and events airline partnership in the state's history. Throughout 2013–14, Qantas and TEQ undertook marketing activity in domestic and international markets under the partnership including the Best of Australia campaign in the United Kingdom (September/October 2013) and Modern Family in the United States of America (April/May 2014)

To do...

- Explore opportunities to further establish commercial partnerships and continue to work with industry to identify mutually beneficial opportunities
- Implement a targeted approach to international markets, strengthening Queensland's presence in China, India and South-East Asia to capitalise on emerging growth opportunities
- Further build strong destination brand awareness.

Outback experience

The *Outback education tour subsidy scheme* was launched in July 2011 as a three-year pilot. The program is a joint initiative delivered by TEQ in partnership with DTESB, DETE (State Schools Division) and OQTA. It aims to increase visitation to this vibrant and diverse region, while also providing an opportunity to integrate the rich history and heritage of Outback Queensland into student learning. Over the three years to 30 June 2014, more than 1100 students from Years 5, 6 and 7 —located from the Gold Coast through to Innisfail—have participated.

During 2013–14, TEQ supported the promotion of the initiative to schools and a publication linking the Outback product to the Australian curriculum as identified by the Queensland Studies Authority (QSA). The initiative continues to be popular, and around 325 students have already booked to visit Outback Queensland on an excursion in 2014–15.



Offer iconic experiences

State of the Industry 2014



‘Queensland needs to perform in a mature globalised tourism market. Integrated Resort Developments have proven internationally to raise the international profile of their cities—far outstripping the performance of traditional standalone facilities such as those currently offered in Queensland. We have a once-in-a-generation opportunity to revitalise Brisbane’s colonial birthplace (Queen’s Wharf) and define Brisbane as a mature and sophisticated New World City. I’m confident our best practice procurement processes will grant proponents the opportunity to be truly innovative and deliver a world-class integrated development that will grow the construction and tourism pillars of the Queensland economy’
— the Honourable Jeff Seeney MP, Deputy Premier and Minister for State Development, Infrastructure and Planning

Highlights

- A new Destination Tourism Planning framework led by Regional Tourism Organisations with agreed actions and priorities for each region to drive growth towards 2020
- *Next Generation Planning Guide* released
- Further development of the ‘experiences’ approach to tourism product development and marketing
- Maintaining a dynamic calendar of major and regional events that further enhances the appeal of Queensland destinations

Queensland will need to continue to provide the signature experiences and iconic attractions our visitors expect—and we will also need to exceed expectations. In the past 12 months our destinations have been preparing their DTPs to guide new tourism investment and development, revitalise their tourism product, and create new and exciting events in their regions. Each region is aiming to create unique and memorable experiences for their visitors. Success will require the support of regional stakeholders, local and state (and federal) governments and the community.

Development of Destination Tourism Plans

TEQ supported each RTO in the development of their respective DTP, the aim of which is to provide the definitive direction for tourism and events in their destination towards 2020.

To assist in the delivery of a consistent approach and comparable outcomes across the state, each RTO was provided with the *Queensland destination tourism planning framework* developed by TEQ and endorsed by TCC. The detailed framework included numerous recommendations for RTOs on the steps involved in the development of their respective DTP, including the likely extent of industry, government and stakeholder consultation and approvals. In addition, TEQ, with the support of DTESB, provided financial support to RTOs where it was required to engage specialist support to complete their DTPs.

RTOs will be responsible for coordinating the implementation of the strategies and actions in their DTPs, driving their destination towards their 2020 targets, working in partnership with industry, other RTOs, all levels of government and the wider community.

Supporting experience development in our destinations

Destination 'hero experiences' have been identified. Work will continue to review and refine their 'hero experiences' to ensure they appropriately and effectively portray the key points of difference of each destination.



TEQ is also working with RTOs to assist industry in effectively leveraging off their destination 'hero experiences' and adopting the 'experiences' approach to the delivery and marketing of their products. This involves the development and delivery of 'Experience development programs' for operators, tailored to suit the needs of operators, and available funding and resources.

Content for an 'Experiences' hub on the new TEQ website is being developed, which will provide training materials, videos and operator testimonials, all aimed at assisting industry in adopting the experiences approach to tourism product delivery and marketing.

Developing and promoting major and regional events

TEQ works to attract, develop and promote major and regional events in Queensland that attract visitors to the state and in turn generate economic, social, profile and community benefits. In 2013–14 major events supported by TEQ generated around \$150m in overnight visitor expenditure and 750 000 visitor nights.

In 2014, examples of new major events secured by TEQ include the Rugby League Four Nations 'Double Header' held in Brisbane in 2014; the Bundaberg Cup touch football match to be held annually from 2015–2020 in Bundaberg; and the Australian Open lawn bowls tournament to be held annually from 2015–2019 on the Gold Coast.

In 2013–14, there were 85 events supported by the TEQ Regional Development Program (RDP) across Queensland. TEQ also administered two funding rounds during this time, awarding \$1.9m to 75 events scheduled to take place between 1 April 2014 and 31 March 2016.

Since the program began in 2001, the RDP has invested more than \$23.5m in 1091 events across two categories, Core Funding and the Significant Regional Events Scheme (supporting multi-year and one-off larger regional events).

The RDP also hosts an annual regional events conference. The conference is open to RTOs, local councils, event organisers and event service providers and affords a platform for networking across the industry and the sharing of best practice and innovation. The 2013 TEQ Regional Development Conference was held in Townsville from 1 to 3 November 2013 with 126 attendees. The 2014 TEQ Regional Development Conference will be held in Mackay from 7 to 9 November 2014.

The *Events strategy towards 2020*—provides a strategic framework for identifying the competitive advantage Queensland has over other states in the strength of its 13 destinations, to guide future investment. The strategy, combined with TEQ's 2020 Strategic Tourism Marketing Plan supports a strong partnership model with Queensland's destinations. A summary of the strategy was presented to each RTO to support the development of each region's respective DTP.

Overall, the strategy supports the development of a distinctive, world-class events calendar that is a sustainable, high-value asset for Queensland and contributes to the objective of reaching \$30b in annual overnight visitor expenditure by 2020.



Cai Guo-Qiang China b.1957 *Head On* 2006
 99 life-sized replicas of wolves and glass wall. Wolves: gauze, resin, and painted hide Dimensions variable
 Deutsche Bank Collection, commissioned by Deutsche Bank AG
 Photo by Hiro Ihara, courtesy Cai Studio

Brisbane blockbuster coup

Securing blockbuster events is a key part of the events strategy to drive visitation to Queensland. Queensland's economy benefitted to the tune of \$14.5m thanks to GOMA's recent blockbuster Cai Guo Qiang exhibition *Falling Back to Earth*, delivered in partnership with TEQ.

Falling Back to Earth, which ran from November 2013 to May 2014, attracted more than 229 000 visits, the second highest attendance to a ticketed exhibition at the Gallery.

The Cai Guo-Qiang: *Falling Back to Earth* exhibition provided a significant boost for Queensland's tourism industry, with the event generating more than 115 000 visitor nights.

Securing Cai Guo-Qiang's first solo exhibition to Australia was an events coup enhancing Queensland's reputation as a premier Arts and cultural destination. *Falling Back to Earth* was one of the most successful exhibitions at GOMA to date, alongside those of work by iconic twentieth century artists Andy Warhol and Pablo Picasso.

Bowls event set to deliver for the Gold Coast

The Gold Coast economy will receive an injection of \$45m after securing the southern hemisphere's largest lawn bowls event, the Australian Open, for the next five years—from 2015–2019.

More than 4000 competitors are expected to converge on the Gold Coast from 13–25 June in 2015 for the first event under the package secured by TEQ, which will see the tournament expand from a five-day competition to a 13-day festival.

It will be the first time in the event's ten-year history that the Australian Open lawn bowls tournament has been hosted outside of Victoria, and competitor numbers are expected to increase from around 1700, to more than 4000.

The tournament will showcase the region, using 22 bowls clubs across the Gold Coast. And with lawn bowls being a core sport of the Commonwealth Games, securing this event ahead of the Gold Coast 2018 Commonwealth Games further demonstrates Queensland's ability to host high-calibre sporting events.

Additionally, the Gold Coast is set to host another major world-class bowls event, with Club Helensvale awarded the rights to stage the World Champion of Champions singles showpiece for two consecutive years from 2015.

Delivering planning reform to support tourism investment

The Queensland Government established the State Planning Policy (SPP) in December 2013 to simplify and clarify matters of state interest in land-use planning and development. The SPP for the first time recognised that tourism is a state interest and that planning instruments need to consider and provide for tourism matters. This process supports the reduction in red tape by facilitating and streamlining the delivery of sustainable tourism development through the local planning scheme.

Regional plans under development or being developed recognise the important role of tourism in regions and the characteristics of those tourism opportunities; for example, the relationship between tourism and infrastructure, particularly transport infrastructure. These plans also ensure additional regulation to tourism development is not imposed.

The government also finalised the amendment (gazetted 2 May 2014) to the *South East Queensland Regional Plan 2009–2031 State Planning Regulatory Provisions* to give local governments the ability to consider development applications for larger tourism, and sport and recreational activity outside the Urban Footprint.

To assist DSDIP and local government interpret and apply the SPP, DTESB has prepared the *Next generation tourism planning guide*. Launched with the SPP, the *Next generation tourism planning guide* provides a toolkit for planners to incorporate tourism development into planning instruments. DTESB has distributed and presented the guideline to local government and DSDIP. This proactive approach has resulted in changes to the drafting of planning schemes to make them investment-ready through better reflecting the nature of tourism in their areas, and minimising the level of regulation required for tourism developments. The guideline forms the basis for review of planning schemes when they are reviewed to ensure compliance against state interests.

Engaging councils in planning processes which embrace tourism development

DSDIP has been working with local councils across Queensland to incorporate tourism land-use planning within their local planning schemes by integrating the *Next generation tourism planning guide* into the process of preparing new planning schemes through a council-tailored approach with a focus on early engagement. By working with local councils, DSDIP has identified that planning schemes can incorporate appropriate levels of assessment which will encourage developers to take on these eco/cultural-tourism developments.

Outcomes of workshops being led by DSDIP throughout Regional Queensland:

- regional review of tourism in Far North Queensland
- greater flexibility for new tourism development within the Redland local government area to better facilitate locally specific tourism industries in Redland City
- developing access and tourism opportunities with the Palace in Barcaldine/Blackall-Tambo and Walker's Mountain Lookout at Flinders Shire over the plateau
- reviewing potential for recreational use of the dam at Mistake Creek Winton
- developing a water recreation area for accommodation and water recreation in the Burke Shire
- facilitated the transition of the planning elements from a temporary local planning instrument into the draft Moreton Bay Planning Scheme to safeguard the future use of the Woodfordia site.

The 'Regulatory encumbrances to tourism investment project' will identify and analyse how tourism investment is promoted by state and local governments in the South East Queensland West Region and examine the encumbrances placed by government on new investment in tourism specifically in non-urban zones.



Restaurant Australia campaign

In response to the growing global demand for food and wine as part of the travel experience, Tourism Australia is evolving its *There's nothing like Australia* campaign to put the spotlight on Australia's finest array of produce served in the most stunning locations in the world. Tourism Australia is evolving its global campaign with the idea that Australia could be the world's greatest restaurant—Restaurant Australia. There are three phases to the campaign.

Restaurant Australia campaign

Phase One: Rally cry (May 2014). Using Australian food and wine personalities, Tourism Australia and the states rallied the Australian tourism industry to identify the best food and wine experiences the country has to offer.

Phase Two: In-market activity (June 2014 to March 2015). In-market launches and campaign activity will be co-ordinated in conjunction with our TEQ offices.

Phase Three: ‘Inviting the world to dinner’ (November 2014). An extraordinary family where up to 80 food and wine influencers from across the globe will come together for an ‘Invite the world to dinner’ gala event, which will see produce from around Australia prepared and served on-site at the Museum of Old New Art (MONA) in Tasmania. A selection of these influencers will also tour Queensland to experience the state’s exceptional food and wine offerings.

To date, more than 190 Queensland food and wine operators have shared their food and wine experience via the Restaurant Australia website. Research conducted by Tourism Australia in 2013 identified food and wine as a key factor in holiday decision-making, closely followed by world-class beauty and natural environments.

Visitor Information Centres

During 2013–14, TEQ facilitated the development of the *Visitor information centres (VICs) directions paper: a way forward for Queensland VICs* publication. The directions paper was designed as an overarching document to provide guidance to Queensland VICs and major stakeholders in evolving their operations to meet the needs of visitors in a changing tourism environment.



It outlines suggested strategies on how the Queensland VIC network can positively adapt through enhancing services and embracing new opportunities. The directions paper aims to capture future thinking about the role of accredited VICs as information providers in Queensland and inform decisions made by VIC owners, managers and other VIC stakeholders. The content included in the directions paper is based on the information gathered through consultation with industry through the development of a discussion paper, *The future of Queensland accredited visitor information centres*, which was produced and released for public comment in late 2013.

A VIC smartphone application was developed and released in February 2014. The new smartphone application identifies the three nearest accredited VICs to a user’s location and provides users with up to 12 recommendations from their nearest accredited VIC on local tourism experiences such as events, attractions, tours and restaurants. It aims to make the valuable local knowledge of VICs more accessible to visitors and showcase products available in their regions. The app will be particularly useful for travellers on drive holidays, which tends to be the largest market for VICs, providing passengers with instant information while they are on the road. The app was an initiative of TEQ in partnership with the Queensland Information Centres Association.

To do...

- Support Queensland’s 13 regional tourism organisations on the delivery of action items outlined under each destination tourism plan
- Continue to maintain a calendar of major and regional events that delivers significant tourism, economic and social benefits for Queensland communities
- Continue to work with key destination stakeholders on developing experiences that entice repeat visitation
- Continue to work with local government to help implement planning schemes that support tourism.



Grow investment and access

State of the Industry 2014



'Through the Partnership Agreement between my department, QTIC and DTESB, we are working more closely than ever with the tourism industry. Whether it is investing in the road network to improve safety, flood immunity or the drive experience, installing new signage to help encourage tourism or making it easy for tourism businesses to do business with us – we remain committed to working with the industry to help it grow. Tourism signage is one area industry told us it wanted fixed. The significant reforms delivered under the Queensland Drive Tourism Strategy are a positive result for the industry.' – the Honourable Scott Emerson MP, Minister for Transport and Main Roads

Highlights

- Four major tourism projects declared by Queensland's Coordinator-General
- New airline routes attracted from priority international destinations
- Improve certainty in land tenure for long-term tourism investment
- Faster and more flexible rent calculations for industry during periods of hardship
- *Camping Options Toolkit* released

New investment is necessary to grow tourism in Queensland. We will require investment in hard product; in building operator capacity in new and emerging technologies; in making it easier to reach our destinations; in improving skills and quality; and in creating a business environment which encourages investment. The Queensland Government has been reducing red tape and attracting new investment into Queensland through the efforts of DTESB, its significant planning reforms, the formal recognition of tourism in its single State Planning Policy, and by ensuring key tourism projects are well managed. For industry, finding the time to invest in new product or skills and pursue innovation may be challenging, but the benefits to operators will be an increase in quality and productivity.

Improving our road infrastructure along key drive routes

The *Queensland transport and roads infrastructure program 2014–15 to 2017–18* (QTRIP) outlines \$4.8b of planned transport and roads infrastructure investment in 2014–15. Key priorities of QTRIP include improving capacity and safety on major arteries such as the Bruce and Warrego Highways, and enhancing regional linkages. These improvements will be of significant benefit to tourists as they travel around the state.

Bruce Highway

The Bruce Highway is the main link for tourists to access some of the best natural wonders along the east coast of Queensland. Funding of \$768m, from the Commonwealth and Queensland Governments, is provided in 2014–15 for the upgrade of the Bruce Highway. Some of the key projects in 2014–15 include:

- upgrade of the Cooroy to Curra section between Cooroy Southern Interchange and Sankeys Road
- four-laning between Vantassel Street and Stuart Drive in Townsville
- construction of an elevated crossing across Yeppen Floodplain
- upgrade of Caloundra Road to Sunshine Motorway
- six-laning extension between Robert Road and Foster Road (Cairns Southern Access Corridor State 2).

Warrego Highway

The Warrego Highway is a critical east–west route in southern Queensland. In 2014–15, \$179m is provided for works on the Warrego Highway. Key projects include:

- commencement of the Toowoomba second range crossing project
- intersection improvements on the Brisbane Valley Highway
- four-laning from Nugents Pinch Road to the west of Charlton—this project is the first part of the \$635m program to upgrade the Warrego Highway.

A ‘Drive tourism and transport infrastructure study’, which was completed in June 2014, included detailed analysis of 16 key drive routes across Queensland to identify deficiencies and priority investment projects. It was undertaken to facilitate consideration of drive tourism interests in state and local government transport planning and investment processes.

Queensland Drive Tourism Strategy 2013–2015

Our regional cities and towns rely heavily on the drive tourism market to support their local businesses. *Queensland drive tourism strategy 2013–2015* (QDTS) launched on 24 January 2013, has been guiding our collaborative approach to encourage more travellers to take a driving holiday in Queensland and position the state as a world-leading drive tourism destination. With a broad range of Queensland Government agencies directly involved in delivering this strategy, the strategy has already started to deliver a stronger whole-of-government focus on tourism by getting agencies ‘thinking tourism’ and identifying collaborative opportunities.



As part of the QDTS, the Department of Transport and Main Roads (DTMR) has made a commitment to a program of investment in tourism signage. Over the past 12 months the installation of new tourism signage along Australia’s Country Way, which runs from Wallangarra through Toowoomba, onto Rockhampton via Kingaroy, has been delivered. The revitalised signage includes photographic images for 32 individual communities on ‘welcome to town’ signs, which also promote the local accredited visitor information centres, as well as signs to interesting local natural attractions that can be accessed along and off the route.

The next state strategic touring route to be revitalised includes signage along:

- a section of the Pacific Coast touring route between Caboolture and Maryborough. The signage scheme will include ‘Welcome to the Sunshine Coast’ signage that contains beach and hinterland images, signage that encourages tourists to enjoy the natural attractions within the area that have a significant tourism experience, ‘welcome to town’ signs that are along the route and signs showing the distance to local accredited VICs
- the Capricorn Way between Rockhampton and Longreach.

A review of how services, including accommodation, apply for white-on-blue service signs, and the criteria they must meet has been developed and finalised. Services are now provided with a more streamlined application process, user-friendly documentation and the ability to apply for white-on blue-service signs online.

A *Best practice guide for roadside rest areas* was released in July 2014 and provides contemporary ‘best practice’ guidance on the development or upgrading of the state’s roadside rest areas, to enhance the visitor experience for drive tourists. The guide was developed under the guidance of the joint industry and government Roadside Rest Area Consultative Forum.

New drive tourism experiences have been developed and promoted through the Queensland consumer website. DTESB, the Department of Environment and Heritage Protection and TEQ developed and uploaded 87 memorial attractions and 13 journeys to ATDW as part of a drive feature being offered to commemorate the ANZAC centenary.

A *Queensland camping options toolkit* was completed in March 2014 following extensive industry consultation, which included seven regional workshops and direction provided by the joint industry and government Camping Options Reference Group.



The toolkit provides local governments with the tools to help plan and develop local camping options and grow the supply and diversity of facilities to suit the needs of all visitors. While implementation is at the discretion of councils, the Queensland Government continues to work with councils to help them implement the toolkit.

Improving our rail tourism experience

A \$200m investment in world-class long-distance regional train travel provided a boost for the Queensland tourism industry during 2013–14, with the *Spirit of Queensland* making its maiden voyage from Brisbane to Cairns.

The *Spirit of Queensland* offers one of the most unique rail journeys in Australia, covering 1681 kilometres of Queensland's coastline, including the picturesque mountains, cane farms, rainforest, and beautiful regional towns and cities. During 2014–15 this train will be joined by a brand new tilt train and another refurbished tilt train as part of the government's efforts to deliver better infrastructure and support tourism as one of the four pillars of our economy.

State of the Industry 2014



'We committed to improving the business environment for industry by reducing our red tape burden. I am pleased that each of the liquor and gaming red tape reduction reforms that I announced at the last DestinationQ forum have been implemented, in fact we have achieved over 60 initiatives as part of this reform process. To be the best place in Australia to do business also means we have to have the most competitive business environment and be fair to workers. We continue to advocate for workplace relations reforms which address cost issues for business, such as the reduction in workers compensation premiums, whilst maintaining important protections for our workers.' — The Honourable Jarrod Bleijie MP, Attorney-General and Minister for Justice

Building a better business environment by reducing red tape

Since the urgent need for red-tape reduction in the regulation of liquor and gaming was raised at the first *DestinationQ* forum in 2012, the Queensland Government has removed over 60 requirements from the licensing and compliance framework for the liquor and gaming industry. The fact that processing times for certain applications have been reduced by 50% is just one indication that these reforms have been effective.

Additionally, because government took a risk-based approach to red-tape reduction, these initiatives are not expected to impact on community safety in regard to liquor and gambling harm. In fact, the establishment of Safe Night Precincts in key entertainment precincts (many of which are popular tourist destinations) will further help to ensure that visitors can safely enjoy all that Queensland's night-time economy has to offer.

A number of tourism-related red-tape reduction initiatives achieved so far include:

- Tour operators have been exempted from the *Liquor Act 1992*, to the extent that they may supply a limited amount of liquor (two standard drinks per client per day) to clients who are part of a tour.
- The requirement that licensed vessels, such as tour boats, must have an approved manager onboard has been removed.
- Note acceptors restrictions, which prevented gaming machines in Queensland from accepting \$50 and \$100 notes, were removed. Previously, Queensland's casinos (in particular) were disadvantaged, compared to their interstate and international competition, by a requirement that prevented gaming machine note acceptors from accepting \$50 and \$100 notes. Other states on the eastern seaboard did not restrict note acceptors in this fashion.

A significant number of other regulatory requirements applicable to the liquor and gaming industries have been removed, which in turn removes barriers to the establishment and ongoing viability of clubs, hotels, restaurants, cafes and other hospitality businesses. For instance:

- licensees are no longer required to keep registers of staff members who are trained in the responsible service of alcohol
- certain low-risk venues are no longer required to provide an approved manager
- the number of application requirements prescribed in gaming machine legislation has been reduced.



Case study: Exemption from the Liquor Act for tour operators

In November 2013, Parliament passed the *Liquor (Red Tape Reduction) and Other Legislation Amendment Act 2013*—the second major Act delivering red tape reduction in the regulation of liquor and gaming since the inaugural *DestinationQ* forum in 2012.

Among the provisions contained in the Act was an amendment that exempts tour operators from the *Liquor Act 1992* (the Liquor Act), to the extent that they may sell two standard drinks to an adult tour participant during a tour.

The amendment releases tour operators who only want to sell a limited amount of liquor from the requirement to hold a liquor licence, thus saving these operators application fees of \$1170 and ongoing annual licence fees of up to \$584 per year.

This simple but effective proposal was raised by representatives of the Liquor and Gaming Red Tape Reduction Expert Panel appointed by the government in September 2012 to review liquor licensing laws, gaming, trading hours and noise restrictions—areas which were identified as reform priorities by participants at the inaugural *DestinationQ* forum in 2012.

Tour operators who wish to sell up to two standard drinks per day to each adult participating in a tour may now do so, without any need for government approval. However, operators should be aware that, for consistency with other provisions of the Liquor Act, there are some limitations to the exemption. Specifically, a tour operator cannot sell liquor, or allow liquor to be consumed by tour participants, if any of the following apply:

- it is Christmas Day or Good Friday
- it is between 5am and 10am on any day, or before 1 pm on Anzac Day
- the tour is occurring and currently located in an area where alcohol restrictions are in place.

If it is desired to serve more than two standard drinks to any adult on a single day, a liquor licence or permit is required. Additionally, tour operators should be aware that the Liquor Act generally prohibits (with some exceptions) the consumption of liquor in a public place, regardless of how the liquor was obtained.

One-Stop Shop reducing red tape

The government's One-Stop Shop commitment is about making services simpler, clearer and faster for all Queenslanders. For tourism operators, this will reduce the cost of doing business by making it easier to access information and basic transactions online at www.qld.gov.au or www.business.qld.gov.au. We have committed to making general information about all Queensland Government services available online and through **13 QGOV (13 74 68)** by the end of 2014, and delivering 200 new online transactions by the end of 2015.

Reducing our land-tenure red tape and supporting industry through hardship

We are supporting industry, not only by reducing red tape but also in times of hardship. Under recent reforms (effective as of 1 July 2014), existing and new island resort operators who lease state land will have the opportunity to maximise the security of their tenure. Certainty of land tenure has been achieved through the introduction of rolling term leases that will apply to tourism resorts on declared islands. Term leases will be able to be extended in the last 20 years of the lease, meaning that a lessee can expect to benefit from up to 50 years of secure tenure. With this, the lessees can demonstrate to potential investors the security of their investment—an advantage of special importance to the tourism industry, where multi-million dollar projects require an extended term. In addition, lessees that hold adjoining term and perpetual leases issued for the same purpose will have the opportunity to amalgamate them into a single tenure.

From 1 July 2014, the reform also provides for the Governor in Council to declare an area or particular tenure, as a hardship area if satisfied there is a natural disaster or adverse economic conditions. In doing so, the declarations may allow for rent or instalments to be wholly or partially deferred without the need for the lessee to make application for a rental hardship deferral. From 1 July 2014, the 2% interest rate will no longer apply to any future deferred rents.

Continuing land legislation reforms

In the most significant state land review undertaken for over 100 years, the reforms to the management and administration of state land will deliver a new system that modernises and consolidates legislation, streamlines government processes, reduces red tape and regulation, and improves the way services are delivered to Queenslanders.

As a first step in this reform process, the Queensland Government introduced legislation in March 2014 that targeted reforms to our agricultural and offshore tourism sectors. The release in June 2014 of the discussion paper *Queensland state land—strengthening our economic future* marks the transition of the reform process to the next stage—a wide-reaching review focused on a broader range of land-reform issues across government, including tenure and mainland tourism ventures.

The broad range of land-reform issues presented in the discussion paper include: strengthening security of tenure for leaseholders to promote productivity and economic growth; increasing the flexibility of local governments in their role as managers of reserves, roads and stock routes; improving the legislative framework for the acquisition of land; applying a consistent approach for leasehold and freehold land for reconfiguration of a lot within the development assessment framework; and simplifying and reducing unnecessary regulation and red tape in dealings involving land under the state government's control. The resulting reforms will contribute significantly to the government's red-tape reduction targets and developing the government's four-pillar economy.

Creating greater investment opportunities

In recent years, the Queensland Coordinator-General has approved a number of major tourism development proposals. These have included the \$600m resort on Great Keppel Island, the \$1.4b Ella Bay integrated tourism and residential community, and the \$252m Shute Harbour Marina Development.

Since April 2012, the Coordinator-General has delivered a greater than 50% reduction in comparable average assessment timeframes for large-scale ‘coordinated projects’ in Queensland. The shorter timeframes and greater planning certainty provided by these reforms are significantly reducing barriers to the delivery of these key catalytic projects, including key tourism projects. In order to further streamline the impact assessment processes, while ensuring best practice environmental management and protection, the Coordinator-General is implementing an ‘Efficiency and quality improvement plan’.

Furthermore, in October 2013, the Australian and Queensland Governments signed a memorandum of understanding to deliver a ‘one-stop-shop’ for environmental assessment and approvals through an approvals bilateral agreement.



New major tourism development proposals currently being advanced through the coordinated project assessment process include:

- **Capricorn Integrated Resort:** This \$600m integrated resort community near Yeppoon is an initiative of Iwasaki Sangyo (Aust) Pty Ltd, and will be located on freehold land adjacent to the existing Mercure Capricorn Resort, nine kilometres north of Yeppoon. The project, if built, would comprise conservation, rural and urban precincts. The urban and rural precincts includes a new five-star resort, a recreational vehicle park, a Wagyu cattle-grazing and farm-stay, a residential community, including approximately 8 000 dwellings and a village centre, and an air strip for tourism with potential for a residential airport.
- **Cairns Shipping Development:** Located at Trinity Inlet, this development would accommodate larger cruise ships and provide significantly upgraded land-based infrastructure facilities and services, providing a substantial boost to the Far North Queensland tourism economy.

Since December 2012, the Coordinator-General has undertaken assessments of 12 projects which have been declared prescribed projects by the Deputy Premier. The use of this statutory power has placed the Coordinator-General in a strong position to closely monitor and, in some cases, intervene in approvals processes to ensure there are no undue delays in delivery timelines. Four of the 12 declared prescribed projects are major tourism developments.

Integrated resorts

The government commenced a competitive bid process in December 2013 to attract proposals for world-class integrated resort developments in regional Queensland which could be enhanced by the inclusion of a casino.

The government has made up to two casino licences available for this purpose. Following an EOI process the government shortlisted the Aquis project at Yorkey’s Knob near Cairns and the Broadwater proposal by ASF Consortium for further consideration for these licences through subsequent phases of the integrated resort process:

- **Aquis Resort on the Great Barrier Reef (capital value up to approximately \$8.15b):** A multifaceted integrated tourism development on 343 hectares of land near Cairns. If built, Aquis would be the largest tourism development in Queensland, and provide a major economic boost for North Queensland and the state. Stage 1 of the proposal includes the development of a casino, 4000 hotel rooms, a convention and exhibition centre, theatres, an aquarium, a golf course, high-end retail facilities and community sports facilities. Stage 2 of the proposal includes a second casino, a further 3500 hotel rooms, extensive rainforest landscaping and additional high-end retail facilities.
- **Southport Broadwater Integrated Resort Development Project:** The Gold Coast City Council’s initiative for a cruise ship terminal continues to be actively pursued by ASF Consortium as part of the state’s process for the development of an integrated resort, including a possible casino licence, on the Gold Coast. ASF Consortium’s proposal for an integrated resort development in the Southport Broadwater includes a cruise ship terminal on state-owned land on Wavebreak Island. In addition to the cruise ship terminal, the integrated resort project could include hotel(s), a casino, marina and super yacht facilities, speciality and convenience retail, entertainment and hospitality venues, a mix of residential formats and community open space and recreation facilities.



Queen's Wharf Brisbane project

A significant project within the Brisbane CBD is the Queen's Wharf Brisbane project, which is being offered to the private sector for redevelopment and renewal as a prominent part of the Brisbane city centre. In 2014 the government shortlisted proponents through an EOI process. Two parties with diverse international experience are expected to respond to the Government's Request for Detailed Proposals (RFDP) by late-2014. Following evaluation, a preferred developer is expected to be nominated by mid-2015. Once completed, Queens Wharf will be a world-class landmark that puts Queensland on the world stage as an international tourism destination.

Inskip Peninsula—Rainbow Beach

Informal public consultation was held on two options for a draft Inskip Peninsula master plan. Submissions received will inform the preparation of a proposed master plan by June 2014 that will be presented to key stakeholders for a second and final round of targeted consultation. The final master plan will facilitate the definition of further development precincts in and around the Peninsula and the township of Rainbow Beach.

Building regional economies

The recently released *RegionsQ Framework* recognises the significant economic driver role that tourism plays in regional economies. The framework establishes six priority action areas to deliver strong and resilient regional economies and communities. The *RegionsQ Action Plan*, to be released by early 2015, is being developed with input from tourism and other business and community stakeholders. The action plan will be whole-of-government and will outline government actions to achieve Queensland's vision for the regions.

RegionsQ builds on the work already undertaken to lay the foundations for growth, including the development of *The Queensland Plan*, the rollout of new generation statutory regional plans, the establishment of new Priority Development Areas and the R4R program. The *RegionsQ Framework* introduces projects of regional significance, with an initial nine identified for a targeted place-based approach capitalising on local assets in partnership with the private sector to realise significant benefits for the region. It is expected that over time, further projects of regional significance will be identified.

Proponents involved in large-scale development projects identified as having a significant economic benefit to a specific region will now only have one case manager to deal with for all aspects of state government involvement. This single point of contact will reduce turnaround times, cut more red tape, and lead to the faster deployment of all available government-support mechanisms.

Attracting tourism investors

The Queensland Government continues to assist tourism infrastructure development in the state by working with tourism developers to attract new investors. DTESB provides a whole-of-government approach to tourism investment. In Queensland, DTESB works closely with other government agencies, councils and economic development organisations to attract and facilitate new investment. At a national level, DTESB works with Tourism Australia and Austrade to promote Queensland projects, to identify international investors and to facilitate investment. Initiatives were undertaken locally and internationally to attract investment into new tourism product, including:

- The Premier met with key investors in Singapore, China and Japan during his trade and investment mission in October 2013 to follow-up with them on projects they have planned for Queensland and to provide an overview of other investment opportunities.
- A number of tourism investment opportunities were presented at a Tourism Investment Forum organised by Austrade during Australia Week in China from 7–11 April 2014. The forum was hosted by the Honourable Andrew Robb AO MP, Federal Minister for Trade and Investment, and provided an opportunity for Queensland to attract investment from China.
- An updated *Guide to Hotel Investment in Brisbane* was launched in April 2014. The guide, which was a partnership between the Queensland Government and Brisbane City Council, provides investors with an updated assessment of hotel supply and demand for the Brisbane CBD.

DTESB assists developers of tourism infrastructure projects to become investment ready. In 2014 DTESB engaged Deloitte Touche Tohmatsu to deliver a series of three Tourism Investment Master Classes in Brisbane, Mackay and Cairns to provide interested Queensland companies with insights into how investors assess investment proposals and working with investors. These messages have been reinforced in a series of online webisodes on the government's Business and Industry portal.

Attracting new aviation services

The Attracting Aviation Investment Fund is an \$8m fund established to boost the Queensland tourism industry by attracting more international tourists. The fund has been used to secure new aviation business and routes into Queensland from identified priority markets as well as to enhance existing partnerships.

The fund has been used to secure:

- China Eastern's seasonal service between Shanghai and Cairns
- Air New Zealand's program of flights operating between June and October from Auckland to the Sunshine Coast
- AirAsia X's service between Kuala Lumpur and the Gold Coast increasing to seven per week
- Emirates' upgrade to an A380 aircraft on its daily Dubai–Brisbane–Auckland service.

The fund supports the objectives of the *Queensland Tourism aviation blueprint to 2016*, which provides a strategic framework to drive future airline development opportunities for the state.

Creating an innovative economy

The 'Science and innovation action plan' outlines the Queensland Government's plan to use science and innovation to drive economic success and enable a creative, connected and clever Queensland.

The plan's vision is turning great ideas into great opportunities for Queensland, and its goals are directed at strengthening science and innovation, and improving Queensland's economic performance. It is supported by the 'Science and innovation investment framework', which brings together new investment principles and science and research priorities to help focus Queensland Government investment in science and innovation.

The plan outlines actions to support delivery of science to meet the needs of industry and the public good, and to remove the barriers to businesses driving innovation. The main objectives of the plan that impact the tourism sector are:

- collaborate and share knowledge—focused on promoting our knowledge industries, and trade and investment opportunities, and helping to connect research, industry and businesses
- help businesses grow—focused on reducing red tape, providing information and skills for businesses, facilitating commercialisation opportunities and supporting start-ups.

The plan is about improving the levels of productivity for businesses, including Queensland's tourism operators, so that they, as an industry, continue to grow and contribute to a stronger Queensland economy. A key driver of productivity is innovation. An innovative tourism industry will be better equipped to develop new products that increase Queensland's share of domestic and international tourism. It will also be able to develop innovative systems and processes that support an improved tourism experience and enhance Queensland's competitive advantage.

The plan encourages collaboration and the use of ideas, knowledge and technologies to develop new products, processes and systems. Working closely with research institutions is also encouraged, to develop the new knowledge that will drive tourism innovation and deliver benefits to the industry, its customers and the state.

DSITIA provides a range of programs that are tailored to support business innovation across all sectors, including tourism. Some of these programs include:

- the Innovation Toolbox—an online directory of innovation information, tools and resources
- Ideas2Market—workshops to help SMEs to bring new ideas to market or expand operations
- Business incubators/accelerators and innovation centres—a program for early stage high-growth potential businesses, providing resident and virtual members with support programs, including mentoring, coaching and help with capital-raising.

Digital economy strategy and action plan

The *GoDigitalQld (Queensland digital economy strategy and action plan)* was released in June 2014 and provides the Queensland Government with a roadmap to using digital technologies, content and innovative services to boost productivity, create new jobs and improve connectivity in Queensland.

The *GoDigitalQld* strategy and action plan's vision is for Queensland to be Australia's most digitally interactive state and to be recognised globally as a digital innovation hub. Initiatives under the *GoDigitalQld* strategy and action plan align with the *Destination Success* action plan by highlighting the importance of collaboration with industry and the tourism sector, increasing the adoption of digital technologies and content, and seeking to improve the connectedness and growth of the tourism sector throughout Queensland and its regions.

The tourism sector will benefit from actions supporting the establishment of a Queensland Digital Business Collaboration Group, and a Wi-Fi infrastructure mapping project designed to maximise digital infrastructure and services for Queensland and identify opportunities to expand Wi-Fi availability.

The Queensland Government's *Partners in digital productivity* program aims to raise awareness of the challenges and identify opportunities for increasing productivity across the four-pillar industry sectors through discussion and creation of ongoing industry collaborations with the ICT sector. A *Partners in digital productivity tourism* forum was held in Brisbane in March 2014, involving more than 60 tourism-sector representatives. The broad opportunities identified at the tourism forum are being progressed in conjunction with industry through the establishment of a collaborative working group.

Bringing Queensland national parks image into the digital age

The *Queensland Ecotourism Plan 2013–2020* highlighted the tourism industry's request that government better profile Queensland's national parks and other protected areas, and develop and market engaging, world-class visitor experiences.

DNPRSR, in partnership with TEQ and other key stakeholders, has developed a strong, compelling and consumer-oriented image that captures the dual focus of Queensland's national parks on conservation and the provision of world-class recreation and tourism experiences.

The new Queensland National Parks ecotourism destination brand will support Queensland's tourism economy and Brand Queensland, marketing our protected areas to tourists and Queenslanders alike. This image overhaul has included a re-think about how we present ourselves to interstate and international visitors, and help Queensland's National Parks be more competitive with other global ecotourism and national parks destinations.

The Queensland National Parks brand platform encapsulates a strong consumer-facing proposition centering on 'freedom, adventure and a personal connection with people and places in nature'. Key elements of the new brand include a focus on signature experiences and 'hidden wonders' beyond Queensland's icons. A strong focus on park rangers extending a genuine invitation to visitors and storytelling/interpretation are core aspects of the brand that provide Queensland with the potential to gain a strong advantage over competitor destinations.

The brand's tagline 'keep discovering' is underpinned by Queensland's unique diversity and supports the notion of repeat visitation.

The brand is being progressively rolled out across national parks consumer-facing products, including the Queensland National Parks Facebook page (<https://www.facebook.com/qldnationalparks>), the Parks Discovery website (<http://nationalparks.queensland.com/>), and tourism and visitor promotional brochures and events displays.

Up to 80% of Queenslanders visit a national park each year, and over 70% of national parks' clients use online and social media as a way to find out about and talk about the places they visit. The Queensland Government is also bringing national parks engagement and communications into the social media setting, in line with other good practice frontline service providers and tourism products.

To do...

- Identify successful proponent for Queens Wharf, Brisbane
- Identify projects of regional significance
- Investigation of investment certainty of leases for non-island tourism and other business purposes
- Development of the *Queensland rail tourism strategy*
- Release digital marketing strategy.



List of abbreviations

ABS	Australian Bureau of Statistics	DTESEB	Department of Tourism, Major Events, Small Business and the Commonwealth Games
ABT	Australian Bass Tournament		
AFC	Australian Fishing Championships	DTMR	Department of Transport and Main Roads
AFCM	Australian Festival of Chamber Music	DTP	Destination Tourism Plan
ALoS	Average Length of Stay	EOI	Expression of Interest
ANC	Australia's Nature Coast	FCO	Fraser Coast Opportunities
ANZAC	Australian and New Zealand Army Corps	FIT	Free Independent Traveller
ANZSIC	Australian and New Zealand Standard Industrial Classification	GAPDL	Gladstone Area Promotion and Development Ltd
ARC	Australian Research Council	GCT	Gold Coast Tourism
ATDW	Australian Tourism Data Warehouse	GBRMPA	Great Barrier Reef Marine Park Authority
ATE14	Australian Tourism Exchange 2014	GIFT	Griffith Institute for Tourism
ATEF	Australian Tourism Exchange	GOMA	Gallery of Modern Art
BIP	Business and Industry Portal	GSP	Gross State Product
BM	Brisbane Marketing	IBA	Indigenous Business Australia
BNBT	Bundaberg North Burnett Tourism	ICT	Information and Communications Technology
CA	Capricorn Enterprise	IRD	Integrated Resort Developments
CBD	Central Business District	ISB	Industry Skills Body
CCCQ	Combined Caravan Clubs of Queensland	ITG	National Indigenous Tourism Group
CEO	Chief Executive Officer	JCU	James Cook University
CIAF	Cairns Indigenous Art Fair	LNG	Liquefied Natural Gas
COTAH	College of Tourism and Hospitality	LTO	Local Tourism Organisation
CSIRO	Commonwealth Scientific and Industrial Research Organisation	MONA	Museum of Old and New Art in Tasmania
DATSIMA	Department of Aboriginal and Torres Strait Islander and Multicultural Affairs	MTL	Mackay Tourism Limited
DETE	Department of Education, Training and Employment	My Paradise	My paradise customer service training program
DIY	Do It Yourself	NC Act	Nature Conservation Act 1992
DJAG	Department of Justice and Attorney-General	NCCARF	National Climate Change Adaptation Research Facility
DNPRSR	Department of National Parks, Recreation, Sport and Racing	NTA	National Tourism Alliance
DSDIP	Department of State Development, Infrastructure and Planning	PhD	Doctor of Philosophy
DSITIA	Department of Science, Information Technology, Innovation and the Arts	PiDP	Partners in Digital Productivity Forum
		PR	Public Relations

OQTA	Outback Queensland Tourism Association	TTNQ	Tourism Tropical North Queensland
QDTS	Queensland Drive Tourism Strategy 2013-2015	UCI	Union Cycliste Internationale
QPAC	Queensland Performing Arts Centre	UNESCO	United Nations Educational, Scientific and Cultural Organisation
QSA	Queensland Studies Authority	UNWTO	United Nations World Tourism Organisation
QTIC	Queensland Tourism Industry Council	UQ	University of Queensland
QTRIP	Queensland Transport and Roads Investment Program 2014-15 to 2017-18	USQ	University of Southern Queensland
QuEST	Queensland Eco and Sustainable Tourism	VET	Vocational Education and Training
R4R	Royalties for the Regions program	VFR	Visiting Friends and Relatives
RDP	Regional Development Plan	VIC	Visitor Information Centre
RFDP	Request for Detailed Proposals	WIL	Work Integrated Learning
RNA	Royal National Agricultural and Industrial Association of Queensland	WMDL	Whitsundays Marketing and Development Limited
RTO	Regional Tourism Organisation		
RV	Recreational Vehicle		
SARA	State Assessment and Referral Agency		
SCDL	Sunshine Coast Destination Ltd		
SCU	Southern Cross University		
SEQ	South East Queensland		
SGBR	Southern Great Barrier Reef		
SMEs	Small and Medium Enterprises		
SQCT	Southern Queensland Country Tourism		
SPP	State Planning Policy		
TAFE	Tertiary and Further Education		
TCC	Tourism Cabinet Committee		
TCI	Griffith University's Tourism Confucius Institute		
TEL	Townsville Enterprise Ltd		
TEP	Tourism Employment Plan		
TEQ	Tourism and Events Queensland		
TNQ	Tropical North Queensland		
TRIP	Tourism Regional Immersion Program		
TTF	Tourism and Transport Forum		

