

2015 STATE OF THE INDUSTRY

WHY TOURISM MATTERS



8 %

GSP



1 / 10

JOB S



1 / 8

BUSINESSES



\$23 BILLION

ECONOMIC CONTRIBUTION

FOREWORD

TOURISM IS A MAJOR SUCCESS STORY FOR QUEENSLAND

This \$23 billion industry supports more than 230,000 jobs throughout the state and energises regional economies.

To secure our continued success we must build on the positive partnerships established between government, industry and the community. It is these relationships that will ensure we can invest, excel and grow.

Achieving long-term growth will require a strong and coordinated effort. But it also requires us to take the time to consider these efforts and to reflect on what is working and what we still have left to achieve.

The State of the Industry Report summarises our achievements and shares the insights of regional tourism organisations, universities and other partners like the Queensland Tourism Industry Council (QTIC), and in doing so celebrates the progress we have all made.

The government is taking important steps to grow the tourism industry in Queensland – through a four-year, \$400 million funding guarantee, increased funding to secure the future of the Great Barrier Reef, and reinforcing its commitment to jobs and skills creation across Queensland.



View the online report to hear about Minister Jones' priorities for Queensland tourism.

There are around 51,400 tourism operators in Queensland. This year we want to share our insights with the whole of the industry – and the new online format will allow our report to be distributed as widely as possible throughout the tourism industry.

Thank you for your contribution to Queensland tourism. We are all looking forward to the opportunity to invest, excel and grow tourism together.

The Honourable Anastacia Palaszczuk MP
Premier of Queensland, Minister for Arts

The Honourable Kate Jones MP
Minister for Tourism, Major Events, Small Business and the Commonwealth Games, Minister for Education

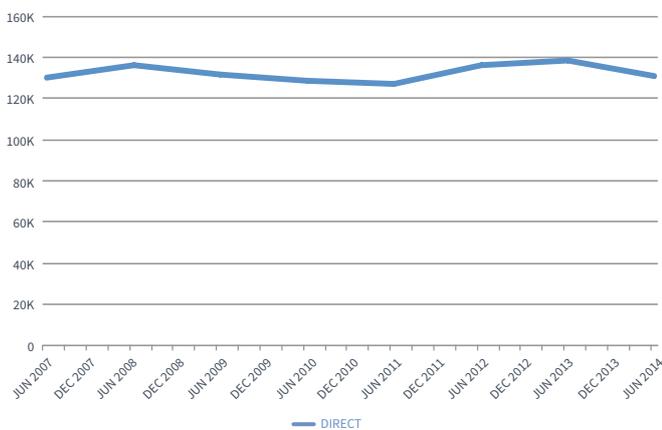
Mr Shane O'Reilly
Chairman—Queensland Tourism Industry Council

QUEENSLAND TOURISM INDUSTRY PERFORMANCE

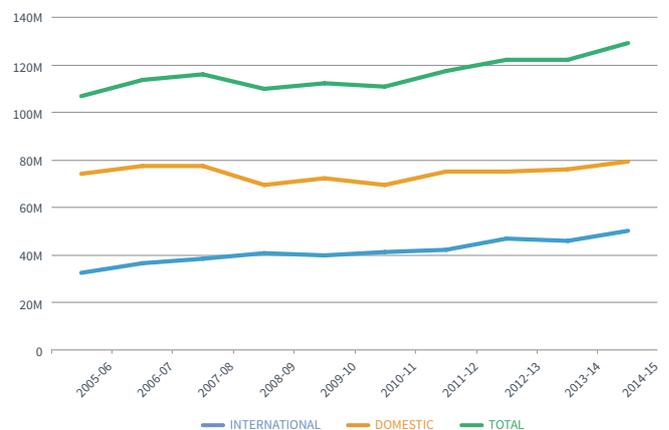
INSIGHTS INTO THE QUEENSLAND TOURISM INDUSTRY'S RECENT PERFORMANCE.

To reach our 2020 goal of \$30 billion in tourism expenditure, it is important to track progress and work cooperatively. The following industry performance review outlines the 2020 progress, overnight visitors and employment. Find out more at stateoftheindustry.destq.com.au

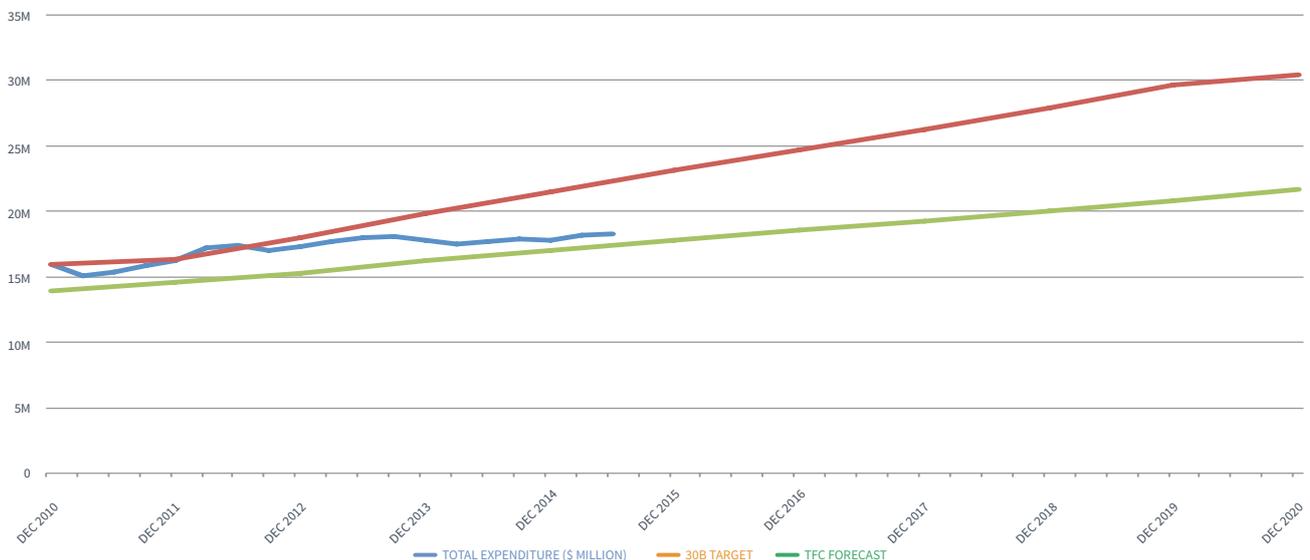
EMPLOYMENT



OVERNIGHT VISITORS



2020 PROGRESS





QUEENSLAND'S 13 TOURISM DESTINATIONS

QUEENSLAND TOURISM TOUCHES THE ENTIRE STATE, FROM COOLANGATTA TO THE CAPE – AND THE STATE'S 13 TOURISM DESTINATIONS ARE DIVERSE AND UNIQUE.

Each of Queensland's regional tourism organisations, in partnership with industry and government, has provided key highlights and case studies. Explore the work of Queensland's individual tourism destinations below.



BRISBANE

HIGHLIGHTS

PARTNERSHIPS AND TRADE ENGAGEMENTS

Brisbane Marketing worked with Tourism Australia, Tourism and Events Queensland (TEQ), Brisbane Airport Corporation, Gold Coast Tourism (GCT), Qantas/China Southern Airlines on an inaugural partnership campaign and trade engagement activities in Japan and China.

HOTEL INVESTMENT STRATEGY

Brisbane Marketing oversaw a successful hotel investment strategy which led to new boutique and brand accommodation openings in Brisbane, including the world's first NEXT Hotel.

BRISBANE 2022 NEW WORLD CITY ACTION PLAN

The Brisbane Major Events Strategy 2014–2020 and Brisbane 2022 New World City Action Plan were developed to deliver one major monthly drawcard event for the region by 2022.



BUNDABERG AND NORTH BURNETT

HIGHLIGHTS

NEW DIGITAL PLATFORM

The Bundaberg and North Burnett region has implemented a new digital platform to make it easier for visitors to learn about and explore the region. The platform includes:

- touchscreen kiosks
- a fully responsive website
- travel apps.

MON REPOS TURTLE CENTRE - ENHANCING THE SIGNATURE TURTLE EXPERIENCE

The Department of National Parks, Sport and Racing (DNPSR), through the Queensland Parks and Wildlife Service, continued implementation of the Master Plan and Directions Paper for the Mon Repos Turtle Centre.

\$526,000 was invested in 2014-15 in a new amphitheatre roof, site signage refresh and

a new entrance feature. The turtle signature experience has been refined in partnership with Bundaberg North Burnett Tourism and TEQ, along with product development and interpretation master classes.

TURTLE DESTINATION MARKETING CAMPAIGN

At the Qantas Australian National Tourism Awards held in Adelaide in April 2015 the region earned gold for its 2013-14 turtle destination marketing campaign. In total, Queensland operators won 5 gold, 2 silver and 9 bronze awards on the night.



WHITSUNDAYS

HIGHLIGHTS

CORROBOREE GREATER CHINA 2015

Tourism Australia's Corroboree Greater China event was hosted on Hamilton Island in May 2015, attracting more than 300 key travel agents to the region.

COOPERATIVE MARKETING CAMPAIGNS

The Whitsundays has delivered national and regional cooperative marketing campaigns valued at over \$1.0 million, to increase destination awareness and drive business to Whitsundays tourism operators.

AIRPORT EXPANSION

Whitsunday Coast Airport expansion efforts by Whitsunday Regional Council resulted in new direct Jetstar service from Melbourne and increased direct Tiger Air service from Sydney, and brought over 30,000 additional passenger seats annually into the region.



CAPRICORN

HIGHLIGHTS

RECOVERY EFFORTS AFTER TROPICAL CYCLONE MARCIA

The Capricorn region benefited from the partnership between Capricorn Enterprise, local and state governments after Tropical Cyclone Marcia in February 2015. Efforts included:

- additional funding for Southern Great Barrier Reef marketing
- marketing to support local events and achieve national television coverage
- promotional activity which led to an increase in domestic and international visitors.

BEEF AUSTRALIA 2015

The region delivered its triennial Beef Australia event from 4–9 May 2015. This major international event attracted a record number of visitors (80,000) including international visitors (1,100) to Rockhampton. Overflow accommodation along the Capricorn Coast and Gladstone delivered millions of dollars to the region's economy.

CASE STUDY

VISITORS PAY RESPECTS TO CAPRICORN REGIONS' PROUD ANZAC HERITAGE

The Capricorn Coast's Centenary of ANZAC Project (Stage 1) officially opened on Saturday 18 April 2015, as part of several ANZAC events in the region.

The project began in August 2011, when long-standing RSL sub-branch member and Emu Park resident, the late Mr Ross Coulter, designed a concept plan for a Centenary of ANZAC Project. It included a memorial and boardwalk to wrap around the headland overlooking Great Keppel Island at Emu Park.

The Emu Park Sub Branch and regional council adopted the plan as a major Centenary of ANZAC Commemorative Project. A steering committee was formed, and substantial commitments from private sector partners also helped the \$1.2 million project to progress.

Despite setbacks due to Tropical Cyclone Marcia on 20 February 2015, extraordinary community efforts saw the Centenary of ANZAC Project (Stage 1) officially open on Saturday 18 April 2015.

On ANZAC Day 2015, nearly 5,000 people attended the dawn service to pay their respects. Since its launch the Centenary of ANZACs Commemorative Walk at Emu Park has attracted high numbers of daily visitors keen to acknowledge, and reflect upon, the sacrifices made by generations of Australian servicemen and women.

While the primary aim of the project was commemorative, flow-on benefits have been strong – with local accommodation, cafes and retail outlets recording improved visitation.

This shows that the celebration of Queensland's local heritage and past, is not only great for local community spirit, but can also offer broader benefits for the economy and jobs creation.



FRASER COAST

SWIM WITH WHALES

A 'swim with whales' experience for local operators was developed with DNPSR, through the Queensland Parks and Wildlife Service. The initiative brought together the local whale watching fleet to develop and implement a code of practice for delivery of these experiences. It also led to new procedures which established the region as best practice for 'swim with whales' experiences. The initiative ensures Fraser Coast continues to play a leading role in whale watching tourism.

AUSTRALIA'S NATURE COAST PARTNERSHIP

In 2012 Sunshine Coast Destination Limited and Fraser Coast Opportunities formed the Australia's Nature Coast (ANC) partnership, to help target international markets.

The partnership has driven visitation and media exposure to both regions. A related initiative arising from the partnership is the Great Beach Drive which combines 2 beach drives, Noosa to Rainbow Beach and Fraser Island to Hervey Bay. The Great Beach Drive has allowed these regions to develop product for the international market that benefits them both.

NEW FRASER ISLAND TOURS

To increase product offerings for the whale fleet outside the annual whale watching season, new Fraser Island tours on the western side of the island have been developed. In the past this side of Fraser Island has been relatively untouched, as it is mainly used for marine access. This initiative provides new products, and makes use of resources that were previously underutilised.



GLADSTONE

HIGHLIGHTS

CARNIVAL AUSTRALIA CRUISE ITINERARIES

Gladstone Area Promotion and Development Ltd (GAPDL) welcomed news that Gladstone will be included in Carnival Australia cruise itineraries from 2016. The first P&O cruise liner will arrive on 20 March 2016. The cruise itinerary was officially launched as The Southern Great Barrier Reef Discovery Cruise by Carnival Australia at an event hosted by GAPDL in 2014.

This strengthens the already strong partnership outcomes achieved by TEQ, Gladstone Regional Council, and the Gladstone Ports Corporation to deliver on the goals of the Destination Tourism Plan (DTP).

REGIONAL DEVELOPMENT FUNDING - AGNES BLUES, ROOTS AND ROCK FESTIVAL

The Gladstone region will benefit from \$10,000 in Queensland Government funding to go towards the Agnes Blues, Roots and Rock Festival, to be held in Gladstone on 26-28 February 2016.

Events play a vital role in promoting destinations, driving visitation, generating jobs and fostering community pride. The Agnes Blues, Roots and Rock Festival is a great event for the Gladstone region.

DESTINATION TOURISM DEVELOPMENT GROUP

Consistent with the DTP the region formed a Destination Tourism Development Group to act as the key co-ordination point for the region's tourism industry by: taking responsibility for delivery, monitoring DTP actions and guiding communication with industry partners.

An important function of the group is to look for ways to increase economic benefits through tourism promotion and development across the Gladstone region and Banana Shire.



VIEW THE FULL REPORT AT

STATEOFTHEINDUSTRY.DESTQ.COM.AU



GOLD COAST

THE AUSTRALIAN TOURISM EXCHANGE

In April 2015 Tourism Australia announced the Gold Coast will host the country's largest annual tourism trade show, the Australian Tourism Exchange (ATE), in 2016. The economic benefits of hosting ATE will be significant and the Gold Coast economy can expect an immediate \$10 million uplift during the 5 day event.

GOLD COAST 2018 QUALITY SERVICE PROJECT

Gold Coast Tourism (GCT) has engaged in the Embracing Gold Coast 2018 Quality Service Project, in conjunction with: the City of the Gold Coast; industry stakeholders; TEQ; and the Department of Tourism, Major Events, Small Business and the Commonwealth Games (DTESB).

This project aims to improve the service culture of the destination as a legacy outcome of Gold Coast 2018 Commonwealth Games (GC2018). It will ensure the Gold Coast offers a great experience to everyone attending GC2018.

CASE STUDY

GOLD COAST & MAINLAND CHINA DIRECT AVIATION ACCESS

On 5 May 2015 it was announced that a twice-weekly flight between the Gold Coast and Wuhan (Hubei), China would commence from late September 2015.

This service opens up a direct link between South East Queensland and one of the largest travel markets in the world, delivering approximately 70,000 seats between China and the Gold Coast each year.

This investment was achieved through ongoing cross-agency efforts by Gold Coast Airport Limited, GCT and TEQ to attract aviation connectivity. China recently overtook New Zealand in visitor numbers, even in the absence of direct air access.

This transforming achievement was underpinned by the City of Gold Coast and complemented by Trade and Investment Queensland. The City of Gold Coast and Queensland Government played a critical role in connecting foreign investors, like the Dalian Wanda Group, with opportunities on the Gold Coast. The Dalian Wanda Group will focus on flight/holiday packages to the Gold Coast where their investment portfolio will continue to grow to meet demand.

The 2014–2020 Gold Coast Destination Tourism Management Plan contains actions intent on growing the visitor economy from what is now the region's largest international source market. These actions flag the need to form a City Aviation Committee to attract and maintain aviation connectivity for the destination with a specific focus on China.

The City Aviation Committee was established in late 2014 consisting of Gold Coast Airport, Brisbane Airport, Gold Coast Tourism, City of Gold Coast and TEQ.



THE MACKAY REGION

HIGHLIGHTS

NEW 'THE MACKAY REGION' BRAND

To reflect The Mackay Region's new brand, the region's hero experiences were tailored to better target its markets and will be featured heavily in new marketing efforts. The region's hero experiences are:

- Unspoilt nature
- Fishing and boating
- Events that celebrate our location.

THE MACKAY REGIONAL EVENTS STRATEGY

To establish a greater focus on the economic benefits of events, Mackay Tourism released the Mackay Regional Events Strategy. The strategy outlines how the Mackay region intends to grow existing events and attract new events to the region, focussing on 'events that celebrate our locations'.

These events will celebrate Mackay's tropical setting, unspoilt nature and diverse fishing experiences.

THE FEATHERED NEST

The Feathered Nest opened in the Mackay Region in 2015 - a new, luxury boutique eco-retreat backing onto a state forest. The retreat is built around a large aviary and freshwater pond, housing native Australian birds and a freshwater turtle. This accommodation represents a new era in eco-retreat development, with wildlife parks being integrated with accommodation developments to give the guest an unforgettable encounter with nature.



SUNSHINE COAST

HIGHLIGHTS

VACATION MIGRATION ADVERTISING CAMPAIGN

Sunshine Coast Destination Ltd (SCDL), in partnership with TEQ and Flight Centre, delivered the \$1.5 million Vacation Migration advertising campaign targeting domestic and New Zealand audiences. Results showed a 65% increase in bookings to the Sunshine Coast during the campaign period.

BUSINESS EVENTS SUNSHINE COAST

In 2014-15 SCDL's Business Events Sunshine Coast hosted more than 540 business events, attracting close to 40,000 delegates (105,000 delegate days) worth \$61 million to the local economy.

NATIONAL AND WORLD EVENTS

National and world events secured include Wanderlust, Tag World Cup, Australian Surf Lifesaving Titles, World Outrigger Titles and World Ironman.



OUTBACK

HIGHLIGHTS

LIVE AUSTRALIA'S STORY

Outback Queensland has developed and delivered a new brand for the first time in a decade. The brand promises visitors will “feel mesmerised and inspired by Outback Queensland, where the land and the people tell Australia’s story”. This positioning was the result of a series of regional tourism organisation and industry stakeholder interviews, and a workshop bringing together key industry stakeholders from across the region. The new brand platform was launched on Wednesday 27 May 2015.

OUTBACK MATES STRATEGY

The region has developed the new Outback Mates strategy to encourage visitors to come, and to stay longer. Outback Mates are keen to lend a hand with expert local knowledge and tips that cannot be found on any website. Visitors are encouraged to keep their eyes peeled to spot their Outback Mates at any of the 23 visitor information centres throughout the region. They are armed with maps, brochures, local knowledge, insider’s tips and advice to make every Outback Queensland experience one to remember.

CASE STUDY

BIG RED RUN AND BIG RED BASH

In recent years the Outback Tourism region has successfully established the Big Red Run, Australia’s first and only 250km multi day race, in conjunction with the Birdsville Big Red Bash. What originally seemed like crazy ideas have proven to be winners for the region, capturing the imagination of people from around Australia and the world, and the participation of thousands.

There were a number of challenges establishing these events, which could not have been overcome without the strong and trusting relationship built with the local community.

Given its remoteness, the event relies heavily on the local community for a range of support services. It operates on a ratio of about 0.8 crew and volunteers per runner, and has grown from 40 runners in 2013 to 80 runners in 2015. Outback Tourism is confident it will go to triple figures in 2016.

One of the biggest challenges was ensuring competitor safety. Organisers had to implement comprehensive safety systems. However, the region rose to the challenge and Big Red Run is now among Australia’s most technologically and logistically advanced running events.

The associated Big Red Bash event has also established itself as one of Australia’s most spectacular outdoor concerts, with the iconic Big Red towering above the stage as the backdrop, and a sprawling campsite on a dry lake bed accommodating thousands of people.

The outback region is passionate about delivering unique and challenging events, and there are rewards to be had if they are planned, managed and executed well. The region believes it is nearing a tipping point where recent successes will ensure the continued growth and development of these, and other, amazing outback events.



SOUTHERN QUEENSLAND COUNTRY

HIGHLIGHTS

MARKETING CAMPAIGNS

Southern Queensland Country Tourism (SQCT) delivered a comprehensive marketing program to:

- improve its positioning as a destination that delivers on its brand promise (slow down, breathe deep and enjoy a taste of life in the country)
- increase leisure visitors and overnight visitor expenditure
- generate leads to participating operators.

In addition to the autumn campaign, SQCT implemented campaigns for spring, summer and winter and a special campaign—Me20—to encourage Brisbane residents to visit the region during the G20 long weekend.

SOUTHERN QUEENSLAND COUNTRY VISITORS' GUIDE

The region produced the third edition of its popular Southern Queensland Country Visitors' Guide (2015/16). The guide is key collateral for the destination and features: engaging editorial; ideas for country drives; local insider tips and a comprehensive calendar of events.

The guide is distributed through visitor information centres, RACQ, campaign and travel shows and enquiries from marketing campaigns.

CASE STUDY

2015 SOUTHERN QUEENSLAND COUNTRY AUTUMN CAMPAIGN

In April 2015 SQCT teamed up with TEQ, industry and local government partners to tempt city-dwellers to visit the Southern Queensland Country region to enjoy its distinct seasons and flavours.

The \$554,000 integrated destination marketing campaign used a range of media including TV, print, out of home and digital activity and was augmented by a public relations and publicity program.

The campaign was launched to the media at the Southern Queensland Country (SQC) Autumn Dinner, held at The Golden Pig Cooking School on 14 April. Renowned chef Jocelyn Hancock, Queensland food ambassador Alison Alexander and wine expert David Bone created a magical evening showcasing regional produce. Local SQC bushman Russell Jackson set the tone, kicking off the evening by sharing his strong connection and feeling for the country.

A key component of the campaign was 2-day activation. With the aim of building awareness of SQC's autumnal offering, regional flavours and distinct seasons, SQC and TEQ took over Brisbane's popular Eat Street Markets at Hamilton, on Friday 17 and Saturday 18 April 2015.

The activation promoted SQC as an authentic and accessible country destination, and encouraged visitors to the region during autumn.

Over the 2 days, Eat Street Markets was transformed into a little piece of SQC in autumn with seasonal country themes and: fresh regional flavours and local wine; farm gate stalls; artisans, producers and growers; cooking demonstrations with leading chef, Miguel Maestre (Channel Ten's The Living Room); country events; a consumer competition and information for consumers to plan their SQC autumn escape.



TOWNSVILLE NORTH QUEENSLAND

HIGHLIGHTS

TOWNSVILLE NORTH QUEENSLAND, ALIVE WITH CURIOSITY

In 2014 Townsville North Queensland launched its first global destination brand in over a decade: *Townsville North Queensland, Alive with Curiosity*.

The new brand presents a region waiting to be explored with surprises and hidden gems around every corner. It is a place to ramble, roam, explore and uncover, offering visitors an interesting, eclectic collection of destinations and attractions. The brand's inaugural campaign resulted in nearly 800,000 views of the campaign video and a 200% increase in traffic to the region's website.

INTERNATIONAL AIR SERVICES

After years of lobbying for Townsville's international air services to be reinstated, in February 2015 the Federal Government announced it would provide border services

to the airport, enabling Townsville Airport to attract international carriers and commence international services. The first flight to Denpasar, Bali, took off on 2 September 2015.

EDUTOURISM

Townsville North Queensland has developed an edutourism program which is attracting students from high schools and universities in Japan and the United States. The program uses the region's natural assets along with world-class education partners to deliver edutourism experiences. The program has:

- created a new tourism market
- enabled operators to diversify their products.

It is a result of collaboration between James Cook University, CSIRO, Australian Institute of Marine Science, the Queensland Government, tourism operators and Townsville Enterprise.



QTIC OUR INDUSTRY

A 12 MONTH QUEENSLAND TOURISM INDUSTRY COUNCIL PERSPECTIVE

The tourism industry's momentum has grown over the year despite significant changes. It is the mark of a strong, cooperative industry to be able to work through change and maintain a clear strategic direction and effective collaboration.

Industry and government have invested heavily to chart a path to 2020 and beyond. Recognising their unifying outcomes, the new government has maintained:

- the *DestinationQ* forum
- a new partnership agreement between government and the Queensland Tourism Industry Council (QTIC)
- action plans endorsed by industry
- a revitalised Tourism and Commonwealth Games Cabinet Committee.

These outcomes grew from a challenging situation. The determination of Queensland operators to overcome obstacles with new ideas, investment and partnerships is delivering returns.

They say fortune favours the brave. This seems to be the case here, with tourism's competitiveness now helped by lower Australian exchange rates, strong international growth, and renewed interest in the domestic market. Even the weather has been kinder.

Nothing was more pivotal for Queensland tourism than the UNESCO decision on the Great Barrier Reef's world heritage status. Tourism played a central role in achieving this outcome—not just in the lead-up to the decision but over many years. World-leading practices on the reef, and the industry's engagement in park management and research, has helped build Australia's reputation as an exemplary guardian of this unique environment.

New confidence has emerged—if this can drive investment and if the challenge of improving quality across the industry can be addressed, tourism is on the right track. Recent jobs growth in tourism and hospitality is just the start of what is possible.



VIEW THE FULL REPORT AT

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DESTINATION SUCCESS ACTION PLAN HIGHLIGHTS

OUR VISION TO ACHIEVE LONG TERM TOURISM SUCCESS

Industry's vision for tourism is to create a successful and competitive Queensland tourism industry where:

- 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.

This involves directing effort across the six key themes. Some of the achievements are outlined below.

DELIVER QUALITY, GREAT SERVICE AND INNOVATION

HIGHLIGHTS

QUALITY SERVICE FRAMEWORK

At the 2014 *DestinationQ* Forum delegates developed 6 collective commitments and more than 200 individual commitments to deliver exceptional experiences to every visitor. This was motivated by new research (e.g. the Voice of the consumer study) and inspiring speakers (e.g. international brand strategy expert, Duane Knapp). The quality agenda continues to be driven by:

- further work initiated ahead of GC2018
- regional workshops
- developing 'Welcome to' programs in many regions.

INDUSTRY-LED WORKFORCE DEVELOPMENT

The government reinstated the successful Skilling Queenslanders for Work initiative, and is establishing Jobs Queensland as an independent statutory authority to provide industry-led advice on skills demand and long-term workforce planning. The government made a commitment to invite a tourism industry representative to sit on the Jobs Queensland board.

LANGUAGE AND CULTURAL AWARENESS

QTIC completed 3 Chinese language and cultural awareness training programs to promote language and cultural awareness among Queensland's tourism operators. 'Ni Hao' programs on the Sunshine Coast and Gold Coast resulted in 34 successful completions. These programs have sparked greater interest in awareness programs. Indian awareness programs were flagged as a future opportunity.

BUILD STRONG PARTNERSHIPS

HIGHLIGHTS

TOURISM AND EVENTS QUEENSLAND'S FOUR YEAR FUNDING GUARANTEE

The 2015 Budget has delivered funding certainty for TEQ, providing \$400 million in funding over the next 4 years. The four year funding guarantee allows TEQ to plan its activities on a longer-term basis, enter into multi-year partnerships, and take a more strategic approach towards marketing and events investment.

TOURISM AND COMMONWEALTH GAMES CABINET COMMITTEE

The government established the Tourism and Commonwealth Games Cabinet Committee (TCGCC) to drive a whole-of-government approach to tourism. The TCGCC coordinates cross-agency tourism priorities and projects to deliver tourism growth. With an expanded role and enhanced decision making powers, membership of the committee includes Minister Kate Jones (Chair), the Deputy Premier Jackie Trad and Treasurer Curtis Pitt. The TCGCC meets with QTIC twice yearly as part of the industry partnership.

CASE STUDY

TOURISM INDUSTRY DIALOGUE

Tourism Minister Kate Jones hosted the Tourism Industry Dialogue on 30 June 2015. Forty tourism industry leaders from across Queensland discussed the key opportunities for tourism and agreed on a set of priorities for 2015/16.

The following are the agreed priorities.

- **LEVERAGING LOCALS AND LOCAL KNOWLEDGE** - The group emphasised the need to engage:
 - the visitor information centre network as part of a local and visitor ambassador program
 - local people as ambassadors and to tell local stories.This priority was seen as particularly relevant ahead of the Gold Coast 2018 Commonwealth Games.
- **ASIA STRATEGY** - Attendees identified the need to have an honest conversation about how successful Queensland is in attracting the Chinese market. This conversation should be underpinned by research insights about what is working, what isn't, and what still needs to be done.
- **TOURISM AS A CAREER** - Attracting the next generation of tourism professionals was seen as a key opportunity. Tourism needs to be promoted as a desirable career to attract international and domestic students into the industry.
- **INNOVATION** - Attendees proposed an innovative, bold and creative thinking approach to develop product and experiences that differentiate Queensland, particularly in ecotourism.

Queensland needs to play to its strengths and maximise the mix across the state's various markets (leisure, business and education).

The dialogue was an opportunity to sign a new industry-government partnership, and endorse a commitment to industry's long term plan, Destination Success, and the destination tourism plans.

PRESERVE OUR NATURE AND CULTURE

HIGHLIGHTS

WELCOMING VISITORS TO NATIONAL PARKS

Queensland's national parks are recognised as offering a key competitive advantage in the tourism market. Developing new and enhancing existing visitor experiences in national parks has been a key priority for the DNPSR, through the Queensland Parks and Wildlife Service. Implementation of the National Park Gateway Visitor Centre master plans has continued at Walkabout Creek, located adjacent to D'Aguiar National Park just outside of the Brisbane CBD, Mon Repos Turtle Centre, located just outside of Bundaberg; and at the David Fleay Wildlife Park, located on the Gold Coast. Over \$4.5 million is being invested in these centres to develop new ecotourism experiences and welcome visitors to national parks right across Queensland.

NATIONAL PARKS DIGITAL STRATEGY

DNPSR developed the Queensland National Parks Digital Strategy to bring Queensland's national parks experiences alive online. The strategy identifies key actions, including establishing social media platforms (e.g. Facebook, YouTube and Instagram), and a new consumer website.

The renewed focus is designed to raise the awareness of Queensland's natural assets and inspire visitation.

CASE STUDY

QUANDAMOOKA FESTIVAL

Yura! Balga Quandamooka djagan!
(Welcome to Quandamooka country!)

The inaugural Quandamooka Festival is an initiative of the Quandamooka Yoolooburrabee Aboriginal Corporation. It is a 3-month calendar of events that celebrate the culture, country, people and waters of the Quandamooka people of Moreton Bay. This landmark series of events was made possible through the support of many government, Aboriginal, Torres Strait Islander, not-for-profit and industry partners.

The festival gives locals and tourists the opportunity to learn about Aboriginal history and culture and Torres Strait Islander history and culture, and to enjoy all that Moreton Bay and its local population have to offer. More than 60 individual events took place across Redlands and Brisbane between the beginning of July and the end of September.

The events were accompanied by ongoing activities such as exhibitions, tours and talks. The festival's seasonal program included traditional cultural activities, performing arts (e.g. dance, music and film) exhibitions, food, markets, sporting events and conservation, education and industry activities.

Highlights of the inaugural festival include the:

- Yura! Festival Opening, held on North Stradbroke Island on 4 July
- Yura Djulungbilla! Welcome the Whales celebration on 25 July
- 4 Islands Sail & Sculpture Festival held over the period 1-9 August
- Pacific Tides Festival on 8 August
- The Kunjiel (Corroboree) & Closing Ceremony on 26-27 September.

The festival will become an annual event. It serves as a model for further initiatives working with the industry, government, Aboriginal communities and Torres Strait Islander communities to share their stories with the world.

TARGET A BALANCED PORTFOLIO OF MARKETS

HIGHLIGHTS

ATTRACTING AVIATION INVESTMENT FUND

The Attracting Aviation Investment Fund received a \$10 million boost from the Queensland Government in the 2015 Budget to attract more international flights to Queensland from key markets. In the past 12 months the fund, guided by the Queensland Tourism Aviation Blueprint, secured new partnerships with:

- Silk Air
- Qantas
- Jetstar
- Hong Kong Airlines
- Air Canada.

This will increase aviation capacity from priority markets such as Singapore, Japan, Greater China (Wuhan and Hong Kong) and Canada.

OUTBACK QUEENSLAND EDUCATION SUBSIDY SCHEME

The Outback Queensland Education Subsidy Scheme received a new three year funding commitment from partners TEQ, Outback Queensland Tourism Association and the Queensland Government to 2016-17. Funding will be \$40,000 per year. The program encourages schools to take students to Outback Queensland to integrate its heritage

into school learning. More than 50 school groups and approximately 2,500 students from across Queensland have accessed the program.

IT'S LIVE! IN QUEENSLAND

TEQ has developed *It's Live! In Queensland* as part of the Queensland events marketing platform. *It's Live* is an events calendar that promotes events across Queensland's 13 destinations. It plays a significant role in attracting visitors to Queensland, growing regional tourism and visitor expenditure. The *It's Live! In Queensland* brand sits within and complements the broader Queensland brand *Where Australia Shines*.

OFFER ICONIC EXPERIENCES

HIGHLIGHTS

'THIS IS QUEENSLAND' APP

The 'This is Queensland' App was deployed in January 2015 as part of a major overhaul of TEQ digital platform. It includes:

- destination, event and tourism product information from the Australian Tourism Data Warehouse (ATDW)
- a wi-fi finder
- content from TEQ and regional tourism organisation social media channels, providing real-time highlights of what's happening in each destination.

It also incorporates iBeacon and GPS technology to encourage visits and sharing of content on social media using official destination hashtags.

INTERNATIONAL EVENTS

TEQ uses information from international staff to develop market connections that will increase international visits to events such as the:

- Gold Coast Airport Marathon
- Rugby 7s
- Australian PGA Championships
- UCI Mountain Bike World Cup.

Together with the DNPSR, TEQ is also seeking to build on the success of the 2014 UCI Mountain Bike World Cup by examining opportunities to hold similar international events in Queensland.

OPERATORS ON TOUR

Operators from across Queensland toured competitor destinations to enhance their knowledge. Operators from Southern Queensland Country travelled to Margaret River to experience best practice product delivery. Outback Queensland Tourism Association operators will tour Tasmania in January, to learn about the experiences offered. Mackay Tourism is offering a leadership program to improve yield and marketing. All these programs offer operators valuable insights on how to develop iconic experiences.



GROW INVESTMENT AND ACCESS

HIGHLIGHTS

INVESTMENT ATTRACTION

An extensive tourism investment pipeline is underway. DTESB is managing 73 projects. In 2014–15 DTESB attracted more than \$147 million through 3 projects:

- Jewell on the Gold Coast (\$45 million invested in 2014-15 – total investment expected to be \$1 billion), supporting more than 2,000 construction jobs and up to 150 permanent jobs when completed
- Capri Hotel in Brisbane (\$72 million), supporting more than 170 permanent jobs
- China Capital Investment Group's \$30.5 million investment into Daydream Island.

QUEEN'S WHARF DEVELOPMENT

The preferred proponent to transform Brisbane's riverfront through an integrated resort development at Queen's Wharf was announced on 21 July 2015. Queen's Wharf's development will attract visitors and investment and open up the precinct for the people of Brisbane to enjoy. Transforming the Queen's Wharf precinct into an entertainment and leisure destination will provide:

- significant economic development opportunities
- up to 3,000 jobs during construction and 8,000 ongoing jobs.

CASE STUDY

INVESTING IN THE FUTURE OF THE GREAT BARRIER REEF

The Great Barrier Reef contributes around \$6 billion annually to our economy and provides more than 60,000 jobs, many of them in the tourism industry. That is why from an economic perspective, it is so important that the reef is protected.

The Queensland Government has invested \$100 million for the protection of the reef. Since coming to office the government has:

- In partnership with the Commonwealth released the Reef 2050 Long-Term Sustainability Plan – the most comprehensive plan ever developed – to secure the health and resilience of the Great Barrier Reef. This included the addition of 19 new and enhanced actions since the government came to office.
- Established a Great Barrier Reef Water Science Taskforce to determine the best approach to meet our water quality targets.
- Dedicated an Office of the Great Barrier Reef within government to ensure the Reef receives specialised attention within government.
- Released the Reef Water Quality Research, Development and Innovation Strategy, which outlines research and development priorities to improve the quality of water entering the Great Barrier Reef from agricultural land use.

TERTIARY INSIGHTS

KNOWLEDGE CENTRE

STRENGTHENING LINKS TO EDUCATION AND RESEARCH

Queensland has well established strengths in tourism research and education, and there are opportunities for industry to benefit from the lessons learned by Queensland's tertiary sector. Leading Queensland tertiary institutions have shared insights across the areas of China tourism, Ecotourism and Environment, Education, Product Development and Quality, and Sustainability.

CHINA

China is Australia's fastest growing tourism market. It is important that the Queensland tourism industry has an understanding of the needs of the Chinese visitor. Insights will help the industry to grow the Chinese market for all Queensland tourism operators.

GRIFFITH UNIVERSITY

SURF LESSONS FOR CHINESE VISITORS?

Griffith University completed a study that suggests Chinese tourists want to experience Australian culture and lifestyle, but often in a slightly different way to domestic visitors. Griffith University researchers have helped learn-to-surf operators to grow by focusing more on beach culture and less adventurous fun activities.



LEARN MORE AT
STATEOFTHEINDUSTRY.DESTQ.COM.AU

ECOTOURISM AND ENVIRONMENT

Ecotourism and the environment are key attractions for the Queensland tourism industry across the state.

THE UNIVERSITY OF QUEENSLAND

NATURE-BASED TOURISM FOR CHINESE VISITORS

The University of Queensland (UQ) conducted a study in which Chinese and Australian visitors to Tangalooma Resort on Moreton Island were compared on their attitudes toward nature, animals and environmental issues. Chinese tourists were more concerned than Australians about climate change, but less comfortable interacting with nature. The study suggested these differences should be taken into account when designing visitor experiences and interpretive programs targeting these markets.



EDUCATION

Only a fully engaged and educated workforce will be able to respond to take advantage of the opportunities the 21st century will bring.

JAMES COOK UNIVERSITY

SHADOWING PROGRAMS AND INITIATIVES

James Cook University (JCU), Tourism, together with Townsville Enterprise and key regional operators have developed Edutourism for the Northern Queensland Region. Launching of the

initiative has begun with promising prospects for informing and educating international visitors built on courses and access to special environmental services and attractions in the region.

A number of regional presentations about Chinese tourists and opportunities for operators have been delivered in 2014-2015. Services to local operators include translating websites into Mandarin and advising on presentation of sites for Asian tourists.

The long running contribution to tourism in the Outer Great Barrier Reef for dwarf minke whale watching continues for its twentieth year with JCU tourism staff guiding much of the research.

TAFE QUEENSLAND BRISBANE

SKILLED WORKER DEMAND CONTINUES TO INCREASE

In the last 12 months demand by the tourism industry for skilled workers has continued to increase. There has been a need for entry level skilled students with the skills to work in the flexible and dynamic tourism and hospitality industry.

This has also been matched by student demand for work experience and internship opportunities, to put their skills and knowledge into professional practice, and also to form important industry networks.



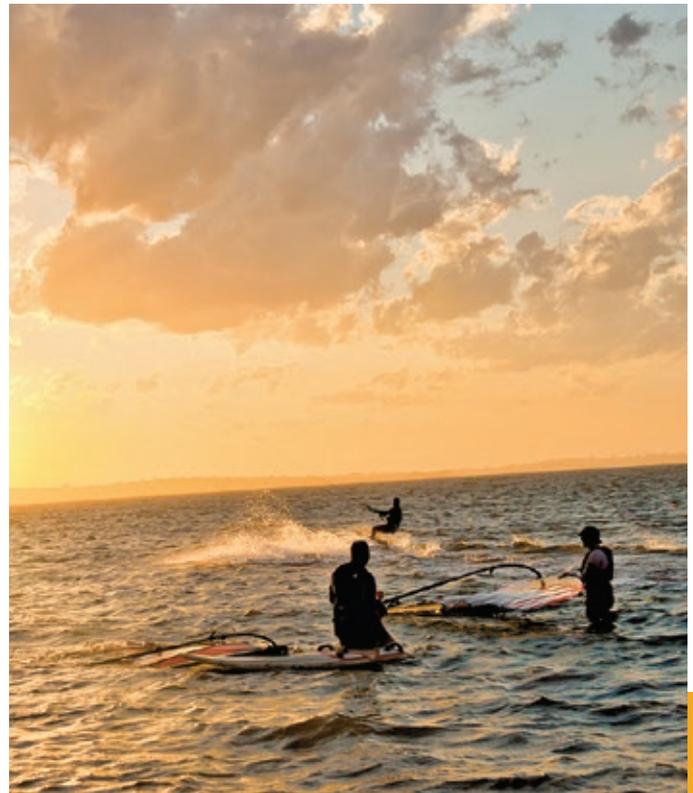
PRODUCT DEVELOPMENT AND QUALITY

Providing new, quality products that are valued by our visitors is critical to delivering on their expectations. Service quality covers all facets of the tourism experience and it is essential that the Queensland tourism industry delivers.

JAMES COOK UNIVERSITY

SUCCESSFUL HUMOUR IN TOURISM

Humour is an important factor that differentiates Australian tourism from other cultures. Even though it has sometimes been misused, humour in marketing, in on-site presentations, and in describing tourist experiences connects people, comforts others and helps tourists to focus on marketing messages. In 2015 JCU researchers Pearce and Pabel wrote a book exploring the good and not so good of humour and tourism.



SUSTAINABILITY

A sustainable tourism industry for Queensland is vital. Identifying opportunities to ensure the Queensland tourism industry continues to benefit from its unique natural asset by reducing our impacts and responding to climate change will be essential for the industry's ongoing success.

UNIVERSITY OF SOUTHERN QUEENSLAND

CLIMATE CHANGE AND SUSTAINABLE TOURISM: CARBON MITIGATION BY ENVIRONMENTALLY CERTIFIED TOURISM ENTERPRISES

Tourism can be susceptible to the impacts of climate change on destinations and businesses. University of Southern Queensland (USQ) conducted an investigation into carbon mitigation actions by environmentally certified tourism enterprises in Queensland, and found that operators had implemented a range of carbon mitigation actions in energy, water, and waste reduction to achieve energy efficiency and reduce consumption. The adoption of renewable energy and carbon offsetting was less common. The findings suggest environmentally certified tourism enterprises could consider emissions reduction measures as an integral part of sustainable tourism development and a key component for their competitiveness.



FROM THE INDUSTRY INDIVIDUAL COMMITMENTS

At the 2014 *DestinationQ* Forum, participants made collective and individual commitments to further develop and grow their products and their industry. These commitments were inspired by the challenge to take Queensland from good, to great, to one of a kind in the eyes of consumers. These commitments continue to inspire collective and individual action across the state.

MY COMMITMENT

“

I commit to working with the industry, government and Aboriginal and Torres Strait Islander communities to share our stories with the world.

CAMERON COSTELLO

Minjerribah Camping trading as Straddie Camping

FOLLOW UP

“

Since DestinationQ I have worked closely with TEQ, Brisbane Marketing and Redland City Council to develop local cultural tourism product.



MY COMMITMENT

“

I am going to spend more time teaching my staff about the Queensland Tourism Plan and vision.

AMANDA JENNINGS-HINTON

Capricorn Caves

FOLLOW UP

“

I am proud to be in tourism and want our staff to know they are a part of something bigger.

MY COMMITMENT

“

I will advocate, investigate and research on behalf of industry to ensure the most competitive business environment to support our industry. Exceed exceptional!

AMANDA ROHAN
QTIC

FOLLOW UP

“

I am working with RTOs, associations and members to establish priorities to accelerate growth in tourism.



MY COMMITMENT

“

I will develop and support development of new tourism products in Queensland.

JOHN SHARPE
Riverlife/Tangatours/P&O Edge

FOLLOW UP

“

Our new adventure products North Shore on the Brisbane River and P&O Edge on 2 P&O ships employ 29 people.

MY COMMITMENT

“

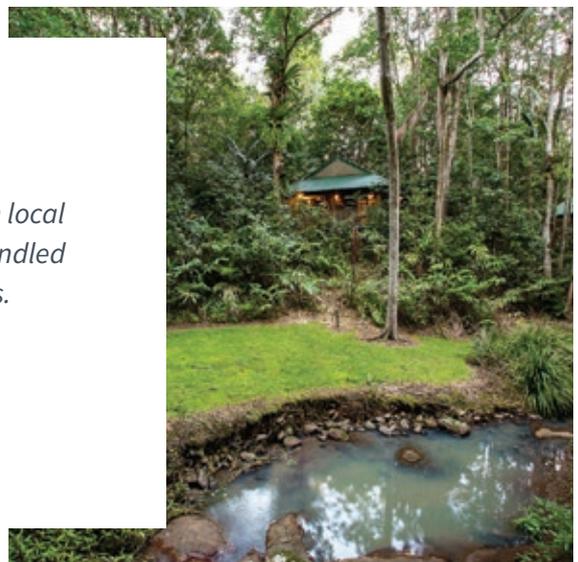
I will work with like-minded operators to help develop a better tourism experience for guests.

MARK SKINNER
Narrows Escape Rainforest Retreat

FOLLOW UP

“

I have collaborated with local operators to develop bundled packages for our visitors.



VIEW THE FULL REPORT AT
STATEOFTHEINDUSTRY.DESTQ.COM.AU

