



2016 State of the Industry

ADVANCING TOURISM
2016–20
GROWING QUEENSLAND JOBS

Foreword

Queensland's tourism industry continues to be one of our major success stories and a key driver of the Queensland economy.

This *2016 State of the Industry* report highlights the key achievements and successes of our industry over the past year.

Over the last 12 months we've celebrated a record number of international and domestic visitors to our state, and seen significant growth in visitor expenditure.

More domestic and international visitors have chosen to spend time in Queensland than ever before.

While we are celebrating a successful year, we know there are significant opportunities for the industry going forward.

We are well placed to take advantage of a rapidly growing Asian tourism market, while continuing to invest in our key international and domestic markets.

The Palaszczuk Government is committed to growing the industry to support our regional economies and create jobs for Queenslanders.

I look forward to continuing to work with industry partners, regional tourism organisations and tourism operators to grow the tourism industry for the benefit of all Queenslanders.

Hon. Kate Jones MP
Minister for Education and
Minister for Tourism and Major Events



Moran Falls, Lamington National Park, June 2016
Photo: Jason Charles Hill Photography
© TEQ/Jason Charles Hill

Strong partnerships: delivering results and investing in future performance

Industry partnerships, future success

The economic, community and environmental benefits tourism delivers to Queensland are now more prominently visible than perhaps ever before. At a time when our economy goes through significant adjustments, tourism has picked up momentum both domestically and internationally. Most importantly, jobs are being created right across the state, driven by visitor dollars.

The outlook remains bright, with global tourism growth expected to outpace the rest of the economy by a significant margin. For our industry this is a time of opportunities, but also challenges—to make the most of this growth and set ourselves up for enduring success and a long-lasting legacy.

Now is the time to put in place strong foundations (in public and private infrastructure), a skilled workforce, innovative entrepreneurship and industry partnerships. Our capacity to work together effectively and with purpose across industry and government will be a key determinant of our future success.

At QTIC we look forward to doing our share in this partnership.

Daniel Gschwind
Chief Executive
Queensland Tourism Industry Council

Queensland's destinations

Each of the 13 regional tourism organisations (RTOs) work in partnership with state and local governments, and other industry bodies and stakeholders across the state to support and grow a diverse and resilient industry.

Reports from the RTOs are available online at www.destq.com.au, including:

- Tourism Tropical North Queensland
- Townsville Enterprise
- Tourism Whitsundays
- Mackay Tourism
- Southern Great Barrier Reef
- Fraser Coast Tourism and Events
- Outback Queensland Tourism Association
- Visit Sunshine Coast
- Brisbane Marketing
- Southern Queensland Country Tourism
- Gold Coast Tourism.

Tertiary research insights

Queensland's strong credentials in tourism research and education are highly regarded. Insights provided by Queensland's leading tertiary institutions are a valuable resource for government and industry alike. Research on topics as diverse as consumer preferences and perceptions, emerging and disruptive technology, cultural insights and market trends address real-world challenges and opportunities. The practical application and interpretation of research will not only benefit industry and government, but will ensure Queensland can stay one step ahead of the rest.

Tourism research and education insights from the tertiary sector are available online at www.destq.com.au.

Queensland tourism industry performance



\$23b industry

Tourism Research Australia—*State Tourism Satellite Accounts: 2014–15*



7.5% of gross state product (direct & indirect)

Tourism Research Australia—*State Tourism Satellite Accounts: 2014–15*



3rd largest export industry (behind coal & food) 14% of Queensland exports

Queensland Statistician's Office
Tourism Research Australia—*State Tourism Satellite Accounts: 2014–15*



Supports 220 000 jobs—1 in 11 or 9.4% of all Queensland jobs

Tourism Research Australia—*State Tourism Satellite Accounts: 2014–15*



International visitor expenditure reached \$5.1b

Tourism Research Australia—year ending June 2016, International Visitor Survey



52 200 tourism businesses 61% in regional areas

Tourism Research Australia—*State Tourism Satellite Accounts: 2014–15* Tourism Research Australia—*Tourism businesses in Australia: June 2011 to June 2015* Australian Bureau of Statistics



7.9% annual increase in overnight visitor expenditure (\$18.3b to \$19.7b)

Tourism Research Australia—year ending June 2016, International and National Visitor Surveys



9 out of 10 tourism businesses are small businesses employing less than 20 people

Tourism Research Australia—*State Tourism Satellite Accounts: 2014–15*



22.7m visitors (2.5m international visitors + 20.2m domestic visitors)

Tourism Research Australia—year ending June 2016, International and National Visitor Surveys



1 quarter (24.8%) of all domestic visitor expenditure is spent in Queensland \$1 in every \$4 spent

Tourism Research Australia—year ending June 2016, National Visitor Survey



Domestic visitor expenditure (overnight visitor expenditure) reached \$14.6b

Tourism Research Australia—year ending June 2016, National Visitor Survey



\$2040 average spend per international visitor

Tourism Research Australia—year ending June 2016, International Visitor Survey

Visitors and expenditure growth

Queensland has seen record international and domestic visitation and expenditure in the past year to June 2016, and the indicators underline the potential for strong growth ahead.

Increase Measure

↑ 58%	Interstate visitors to Townsville region
↑ 45.9%	Interstate visitors to Tropical North Queensland
↑ 37.2%	International visitor expenditure in Townsville region
↑ 35.2%	Domestic visitor expenditure in Townsville region
↑ 33.5%	UK visitors to Mackay region
↑ 30.5%	Chinese visitors to Queensland
↑ 30.6%	Domestic visitors to Whitsunday region
↑ 26.8%	Number of Asian holiday visitors to Queensland
↑ 26.7%	International visitor expenditure in Sunshine Coast region
↑ 26%	Chinese visitor expenditure in Queensland
↑ 24.1%	Domestic visitor expenditure in Tropical North Queensland
↑ 23.3%	Domestic interstate holiday visitors to Queensland
↑ 21.2%	Japanese visitors to Queensland
↑ 20%	US visitors to Queensland
↑ 19.5%	Length of stay by New Zealand holiday visitors to Queensland
↑ 18.4%	Korean and Indian visitors to Queensland
↑ 15.7%	Interstate visitors to Fraser Coast region
↑ 15%	Domestic holiday visitors to Southern Queensland Country region
↑ 14.3%	International visitors to Gold Coast region
↑ 13.5%	Domestic holiday visitors to Queensland
↑ 13.2%	North American visitors to Queensland
↑ 13%	Domestic holiday visitor expenditure in Queensland
↑ 11.3%	International visitors to Queensland
↑ 10.6%	International visitor expenditure in Queensland
↑ 9.7%	International visitors to Brisbane region
↑ 9.4%	Domestic visitors to Outback Queensland
↑ 8.2%	Domestic business travel expenditure
↑ 7%	Domestic visitor expenditure in Queensland
↑ 6.5%	UK visitors to Queensland
↑ 5.7%	Domestic visitors to Queensland
↑ 2.1%	Domestic business travel visitors to Southern Great Barrier Reef region
↑ 1.6%	Above Australian average for domestic visitor expenditure (7% Qld vs 6.4% Aust.)

Source: Tourism Research Australia—year ending June 2016, International and National Visitor Surveys

Highlights: 2015–2016

Targeted efforts by both government and industry over the last year have helped grow visitors, expenditure and industry resilience. [Advancing Tourism 2016–20: Growing Queensland Jobs](#) outlines four key priorities through which we can continue to focus our collective energy and effort. Our achievements and effort over the last year have been extraordinary, and Queensland is well positioned for future growth—including growing our quality products, events and experiences; investing in infrastructure and access; building a skilled workforce and business capability; and seizing the opportunity in Asia.

These highlights represent some of the achievements for government and industry over the last year.

1. Grow quality products, events and experiences

Marketing the best address on earth

More than \$413 million in publicity and promotional value was achieved through Tourism and Events Queensland (TEQ) activities, including:

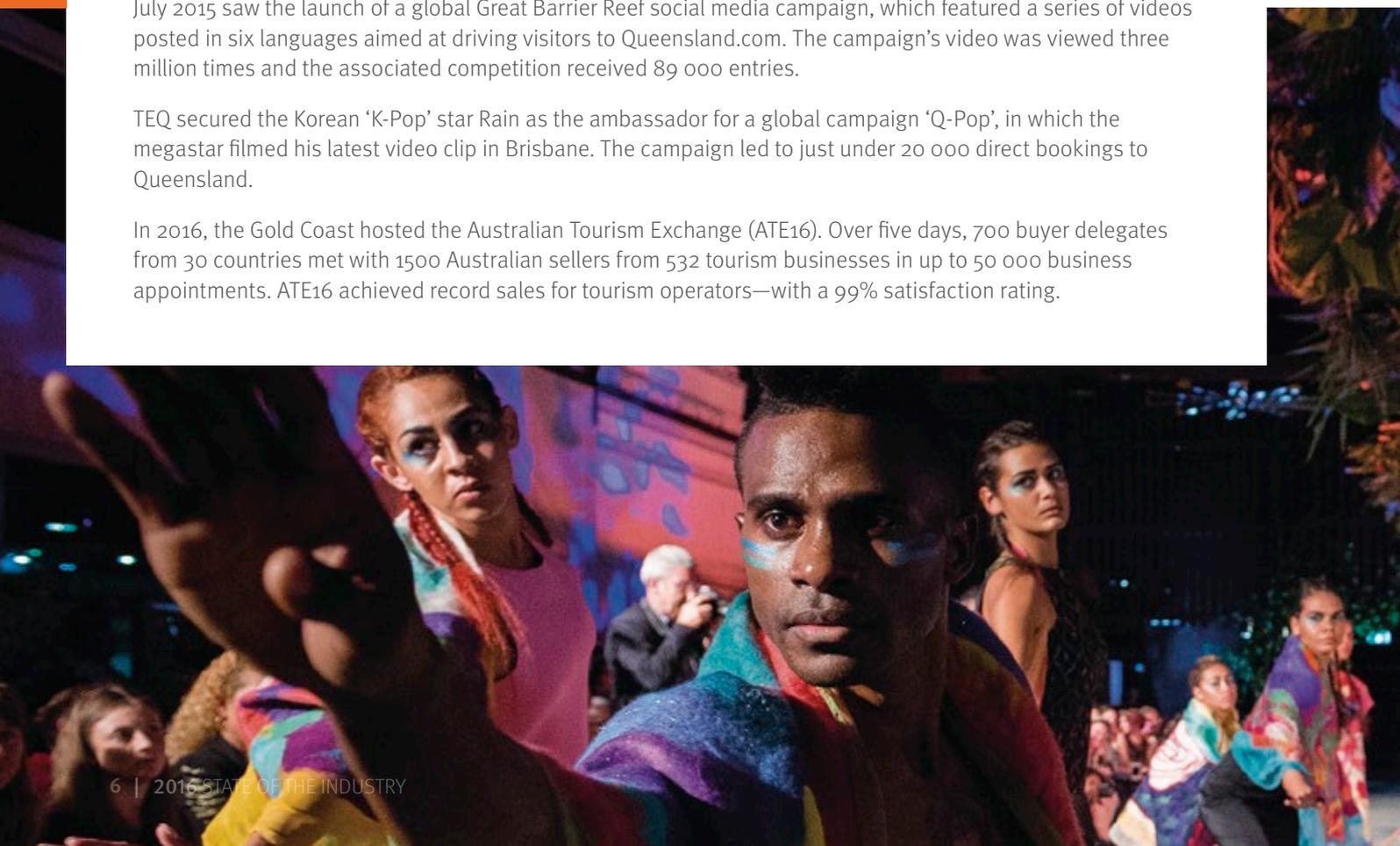
- partnering with Qantas on campaigns coinciding with the release of the Disney movie, *Finding Dory*
- a partnership for Brisbane with *Australian Traveller* magazine
- the Southern Queensland Country Autumn campaign
- the Find Your Paradise campaign (Tropical North Queensland)
- the Where Great Begins campaign (Southern Great Barrier Reef).

TEQ also promoted the British Broadcasting Corporation (BBC) documentary, *David Attenborough's Great Barrier Reef*, which achieved global media coverage and has been viewed by hundreds of millions of people worldwide, and resulted in a significant increase in direct bookings to Queensland.

July 2015 saw the launch of a global Great Barrier Reef social media campaign, which featured a series of videos posted in six languages aimed at driving visitors to Queensland.com. The campaign's video was viewed three million times and the associated competition received 89 000 entries.

TEQ secured the Korean 'K-Pop' star Rain as the ambassador for a global campaign 'Q-Pop', in which the megastar filmed his latest video clip in Brisbane. The campaign led to just under 20 000 direct bookings to Queensland.

In 2016, the Gold Coast hosted the Australian Tourism Exchange (ATE16). Over five days, 700 buyer delegates from 30 countries met with 1500 Australian sellers from 532 tourism businesses in up to 50 000 business appointments. ATE16 achieved record sales for tourism operators—with a 99% satisfaction rating.



Events

Queensland continues to strengthen its major and regional event portfolio under the [It's Live!](#) in Queensland platform, which has become a \$460 million asset for the state.

TEQ-supported events contributed approximately \$360 million in direct and incremental spending to Queensland's economy and approximately 1.6 million visitor nights.

The International Bid Fund helped secure business events, attracting an estimated 10 500 visitors and \$23 million for the state—including the sought after Routes Asia 2018 conference.

TEQ delivered a diverse portfolio of events, including the World Science Festival, and secured major events and conferences such as the Rugby League World Cup 2017, and IRONMAN Asia-Pacific for three years from 2016 to 2018.

Gold Coast 2018 Commonwealth Games

The Queensland Government continued to take steps to realise tourism opportunities in the lead-up to and during the Gold Coast 2018 Commonwealth Games (GC2018), including:

- development of GC2018 social media and tourism public relations strategies by TEQ
- undertaking 'Borobi on tour' to build awareness of Borobi, the GC2018 mascot—including 10 days filming and capturing stills across all GC2018 event cities in order to gain new images for use by tourism partners.

Ecotourism

The Queensland Government released the [Queensland Ecotourism Plan 2016–2020](#) and [Ecotourism Development Toolkit](#) to help investors and developers navigate planning, environmental, regulatory and native title processes applicable to developing ecotourism products and experiences.



Look out for:

- » a new strategic marketing approach to be launched by TEQ in late 2016
- » increasing activity across a range of government initiatives as GC2018 approaches and industry engagement and games benefits activities are implemented
- » other major [events](#) like the Rugby League World Cup 2017, Brisbane Global Tens Rugby, Sudirman Cup and International Triathlon Union (ITU) World Triathlon Series on the Gold Coast.

2. Invest in infrastructure and access

Investment attraction

Development and investment milestones over the last 12 months included:

- construction commencing on the new \$50 million Cairns Aquarium in Tropical North Queensland and on the \$1 billion Jewel Project by Wanda Ridong on the Gold Coast
- \$50 million investment in site works for the Mary Lane project, which includes Brisbane's first Westin Hotel
- opening of the \$100 million Ibis Styles Brisbane Elizabeth Street and official relaunch of the Sheraton Mirage Port Douglas following a \$43 million refurbishment by the Fullshare Group
- acquisition of the South Molle Island Resort by the China Capital Investment Group.

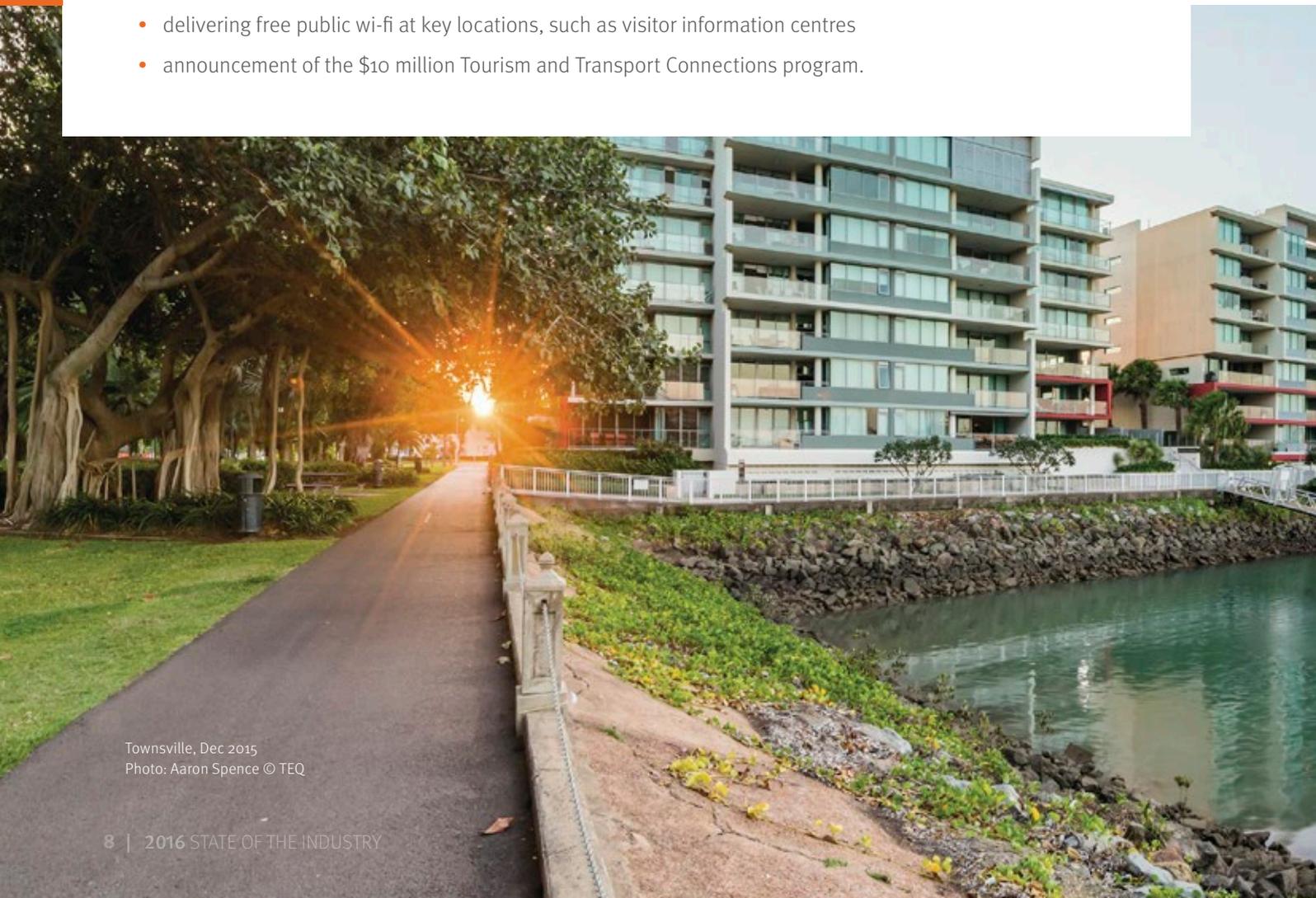
The [Queensland Tourism Investment Guide](#) was released, providing an overview of opportunities for tourism development and investment across the state.

Transport, aviation and cruise

The Queensland Government released a discussion paper about the [Queensland Tourism and Transport Strategy](#) and hosted a ministerial roundtable with the industry reference group.

Drive tourism continued to be a focus, including:

- the ongoing implementation of the \$20 million Supporting Drive Tourism Package
- rollout of the signage revitalisation project across the Capricorn Way between Rockhampton and Emerald
- finalising driving experiences and 'welcome to town' signage guidelines
- delivering free public wi-fi at key locations, such as visitor information centres
- announcement of the \$10 million Tourism and Transport Connections program.



In 2015–16, the Australian Government–funded Tourism Demand Driver Infrastructure program—administered by the Department of Tourism, Major Events, Small Business and the Commonwealth Games—assisted 12 tourism infrastructure and industry capability projects across Queensland to the value of more than \$2.632 million.

The Queensland Government delivered the \$10 million Attracting Aviation Investment Fund to secure new aviation partnerships, routes and increased capacity, including new or increased capacity on flights between Queensland and Singapore, Christchurch, Shanghai, Kuala Lumpur, Taipei, Seoul, Hong Kong and Vancouver.

Strategic partnerships

TEQ signed a **two-year (2016–2018) agreement** with China’s largest social travel network, ‘Mafengwo’, to create themed online campaigns and enriched destination content to help Chinese travellers plan their Queensland holiday. With more than 100 million registered users, Mafengwo.cn is China’s largest online travel social platform.

A new three-year agreement with Qantas (through to 2019) was announced in July 2016 to continue promoting Queensland across key international and Australian markets through strategic marketing, digital campaigns, cross-promotion activity and media and trade opportunities.

The Queensland Government supported the development of several new cruise destinations and attraction of new cruise lines to Queensland. Queensland hosted 329 cruise ship visits in 2015–2016—an increase of 20% on the previous year and the tenth consecutive year of double digit growth.



Look out for:

- » new airline route announcements and flights commencing over the next 12 months
- » the release of the Queensland Tourism and Transport Strategy.



3. Build a skilled workforce and business capabilities

The Queensland Government:

- convened the inaugural Advance Queensland Innovation and Investment Summit in Brisbane from 27 to 29 April 2016
- conducted free workshops with [TripAdvisor](#)—the world’s largest online travel site—to help operators manage their online reputation to boost business and share findings of research commissioned by the state government in 2015 on how consumers viewed key Queensland destinations
- established the [Red Tape Reduction Advisory Council](#) to provide advice to government on regulatory issues and create a strong, profitable and globally competitive business environment for tourism and other industries
- established [Jobs Queensland](#) as an independent statutory authority providing strategic industry advice to government on skills demand and future workforce planning, and committed to the development of a Tourism Workforce Plan
- established the two-year \$100 million [Back to Work—Regional Employment Package](#), which provides support to businesses for up to 8000 job opportunities for regional jobseekers.



Look out for:

- » rollout and implementation of a range of [Advance Queensland](#) programs, including business support, training and funding opportunities implemented through the [Advancing Small Business Queensland Strategy 2016–20](#)
- » consultation to inform the development of a Tourism Workforce Plan.

4. Seize the opportunity in Asia

The Queensland Government:

- established the new four-year \$33.5 million Advance Queensland: Connecting with Asia package, which will help attract more Asian visitors through more international air routes, grow awareness of innovative products and experiences, and build stronger relationships with targeted Asian cities
- held the [Connecting to Asia Forum](#) in Cairns in August 2016, where tourism industry leaders joined government ministers and key stakeholders to identify opportunities to grow tourism from Asia to regional Queensland
- released the [Queensland Asia Tourism Strategy 2016–2025](#), which identifies priority markets, sets ambitious growth targets and complements *Advancing Tourism 2016–20: Growing Queensland Jobs*
- undertook international tourism and trade missions to key markets such as India, Korea, Hong Kong and China.

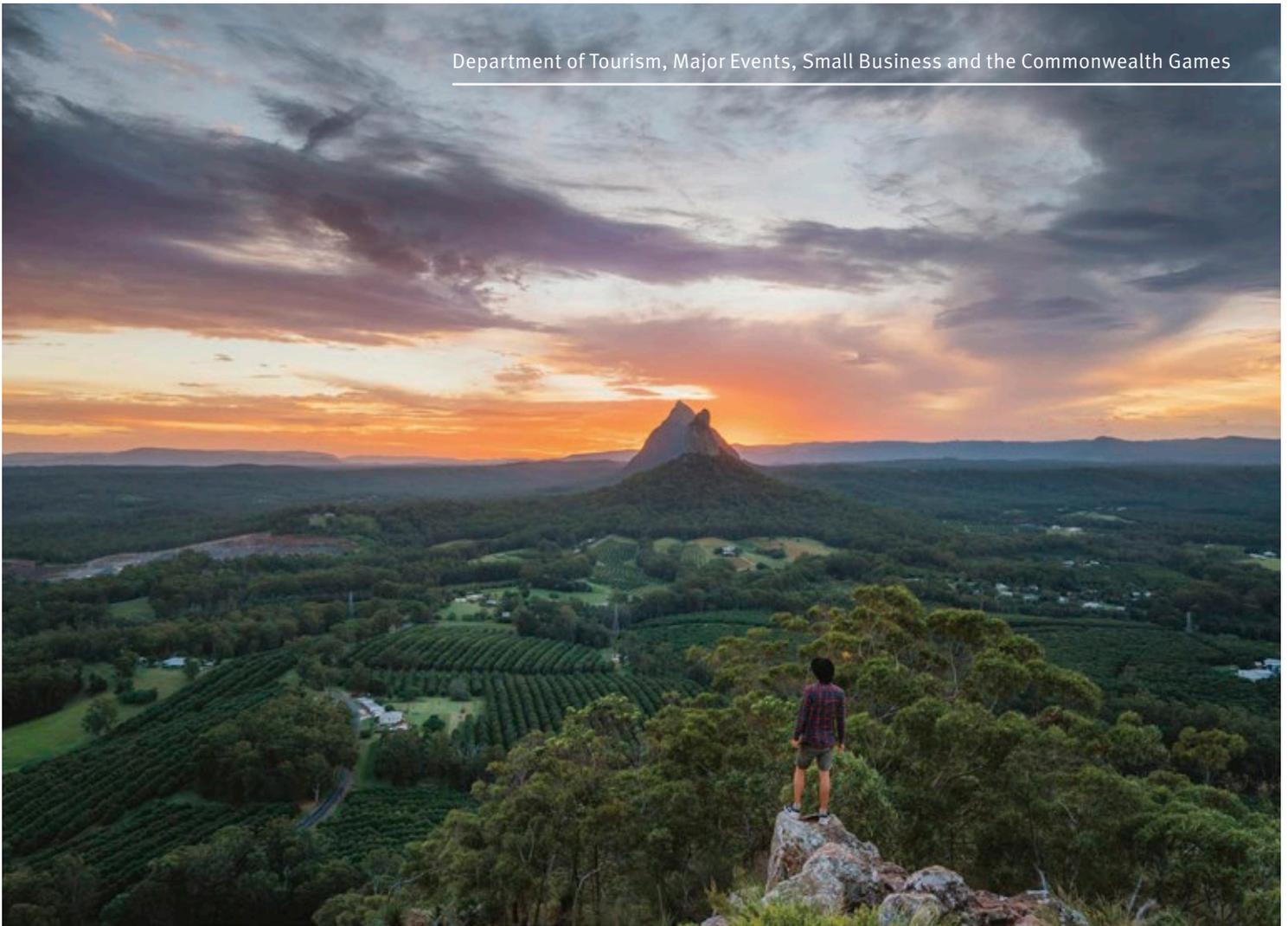


Look out for:

- » implementation of programs and actions as part of the \$33.5 million Advance Queensland: Connecting with Asia package and the [Queensland Asia Tourism Strategy 2016–2025](#).

Moreton Island, June 2011
Photo: Jesse Smith © TEQ





More information

For more information about the tourism industry in Queensland, including the government's plans to grow the tourism industry and jobs, visit www.destq.com.au.

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Front cover image: Tangalooma Wrecks, Moreton Island, January 2016
Photo: Paul Giggie © TEQ

Back cover image: Glasshouse Mountains, Sunshine Coast Hinterland, June 2015
Photo: Jason Charles Hill © TEQ/Jason Charles Hill Photography

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