



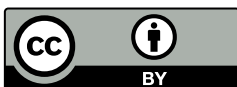
# DESTINATION SUCCESS

The 20-year plan for Queensland tourism



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# DESTINATION SUCCESS

The 20-year plan for Queensland tourism



## Foreword

For decades, tourism has been vital to the Queensland economy, creating jobs, attracting investment and sustaining communities. We want this to still be true in the future.

We signed a landmark industry–government partnership agreement in 2012 and gave a commitment to work together to get tourism back on track in Queensland. We are proud of what has been achieved after just one year, but there is still a lot we need to do.

With this 20-year plan, we are taking the partnership to the next level. We are embarking on a journey to secure the long-term future of Queensland’s tourism industry. This plan sets out our aspirations for what we want to be known for and what will set Queensland apart as a destination of choice in a truly global industry.

We will tackle challenges and opportunities head on—with a true partnership approach and this long-term plan, we will be able to fast-track our success and realise our goals.

It is now up to all of us to work together to make our vision reality.

This is an exciting time to be in tourism in Queensland and we look forward to the long-term success of the tourism industry.

**The Honourable Campbell Newman MP**

Premier of Queensland

**The Honourable Jann Stuckey MP**

Minister for Tourism, Major Events, Small Business and the Commonwealth Games

**Shane O’Reilly**

Chairman, Queensland Tourism Industry Council



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# ***Destination success—at a glance***

## **Goal**

Queensland is Australia's leading tourism destination.

## **Target**

Increase visitor expenditure to \$30 billion 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.

This involves directing effort across six themes.

### **Build strong partnerships**

- Industry and governments will work in partnership at all levels, unified in their approach to support the growth of tourism.
- The tourism industry will have strong leadership that works collaboratively across other industries, with communities and towards a common long-term vision.
- The community will be ambassadors for tourism, welcoming visitors and recognising the benefits that the industry brings to Queenslanders.

### **Preserve our nature and culture**

- Natural assets will continue to be the heart of the Queensland experience—able to be enjoyed by visitors and locals alike, and preserved for future generations.
- Our unique, authentic character and cultural heritage will be preserved and enhanced, and will always be at the heart of the Queensland experience.

### **Deliver quality, great service and innovation**

- We will deliver authentic, quality experiences with a local feel and high standard of service, showcasing the best of the Queensland spirit—friendly, welcoming and down to earth.
- Our industry will be led by career-oriented professionals who are passionate about tourism and their communities.
- Our operators will be technologically smart, connected and efficient, doing business better and reaching consumers in new and innovative ways.

### **Target a balanced portfolio of markets**

- Visitors from Australia and around the world will aspire to visit our destinations many times, exploring the diversity of our state.
- We will target a balanced portfolio of markets that match our competitive strengths and deliver the best results for our destinations.
- We will always look to the future, understanding and acting on consumer trends to appeal to traditional markets and grow new markets.

## Offer iconic experiences

- We will focus on the consumer, and the experiences we offer will create lifelong memories.
- Our destinations will build on and leverage their strengths and heroes—iconic people, places and events—giving visitors many reasons to stay, explore and return.
- Our hero experiences and icons are our points of difference, and this is what we will showcase.

## Grow investment and access

- Well-planned, timely public and private infrastructure will enable tourism growth and visitor access.
- The ability of the industry to invest and innovate will be encouraged through the continued reduction of unnecessary red tape.



Wordle created from statements used by 2013 *DestinationQ* delegates to describe their preferred future (image courtesy of <http://www.tagxedo.com>).

## Strategic directions

To be successful over the long term, industry identified the following strategic directions as the most important things we need to change or build on.

Themes	Strategic directions
<b>Build strong partnerships</b>	<ol style="list-style-type: none"> <li>1. Work together and with governments to ensure effective planning, policies and investment for the life of the 20-year plan.</li> <li>2. Engage the community to make tourism everybody's business.</li> <li>3. Create an industry-wide collaborative culture that puts the customer experience first.</li> <li>4. Inform decision-making with data, research, intelligence and insights.</li> </ol>
<b>Preserve our nature and culture</b>	<ol style="list-style-type: none"> <li>1. Maximise the tourism opportunities of heritage, arts, culture, nature and Indigenous tourism experiences.</li> <li>2. Enable access to our national parks through appropriate infrastructure.</li> <li>3. Use events to activate and showcase our iconic natural experiences.</li> </ol>
<b>Deliver quality, great service and innovation</b>	<ol style="list-style-type: none"> <li>1. Develop the world's best digital tourism systems and integrate technological innovations across all tourism businesses.</li> <li>2. Improve the competitiveness of tourism by advocating for workplace relations reform.</li> <li>3. Deliver a quality service culture and standard.</li> <li>4. Identify workforce priorities to meet the needs of industry.</li> </ol>
<b>Target a balanced portfolio of markets</b>	<ol style="list-style-type: none"> <li>1. Preserve and grow the value of the domestic market.</li> <li>2. Deliver innovative and unique events and experiences to drive repeat visitation.</li> <li>3. Position Queensland as a premier international destination by ensuring our brand emotionally connects with a global audience.</li> </ol>
<b>Offer iconic experiences</b>	<ol style="list-style-type: none"> <li>1. Nurture and support destination events.</li> <li>2. Develop new and existing products to deliver experiences of quality and value that consistently delight the customer.</li> <li>3. Recognise and leverage icons and use product clustering to build visitation.</li> </ol>
<b>Grow investment and access</b>	<ol style="list-style-type: none"> <li>1. Focus investment in our digital presence and accessibility.</li> <li>2. Remove barriers to investment by reducing costs and stimulating investor confidence, ensuring Queensland has a competitive global advantage.</li> <li>3. Deliver a sustainable multimodal transport system that provides safe and equitable access to our destinations and iconic experiences.</li> </ol>

## Why a 20-year plan?

This plan has been developed for several reasons:

- **Change is constant.** The tourism industry will continue to face enormous change over the next 20 years, even more than it has faced in recent decades.
- **We need to focus on what we can control.** Many of the forces facing tourism are beyond our control, so we must focus our efforts on what we can control, including how we conduct our business, what we offer consumers and our value proposition.
- **We must prepare.** No-one has a crystal ball, so we need to be agile and innovative, thinking ahead about what the future may bring.
- **We should think for the long term, but act now.** Change takes time, so we need to plan for the future we want and start working together towards that future.
- **Shared purpose brings shared action.** A common view about what we want our future to be, and the changes we need to make to get there, will lead to shared commitment and action.

## How was this plan developed?

Both industry and government saw the need for a long-term view based on sound information and a committed partnership. Because of this, the main steps in developing the plan included extensive research and wide consultation:

- **CSIRO research** was commissioned to identify the global megatrends that are most likely to affect the tourism industry into the future.
- **Workshops in regions** helped to build a vision that considers the likely future context and the existing strengths of each destination.
- **Student and industry association workshops** ensured the views of current and potential future leaders of the industry were considered.
- The **2013 DestinationQ forum** considered the draft vision and determined strategic directions towards a prosperous future.
- The **Post-Forum Working Group**, supported by the Queensland Tourism Industry Council and government, developed a series of actions for the first 18 months of the plan. Annual action plans will continue this work in coming years.

## How is this plan different?

This 20-year plan is different from previous long-range planning exercises in several significant ways:

- **It is built on partnerships.** The Queensland Government and the tourism industry entered an historic partnership in 2012 to build tourism together. This partnership approach—called *DestinationQ*—underpins this plan.
- **It is proactive, not reactive.** This plan was developed not to respond to an immediate crisis, but to actively prepare the industry for long-term success.
- **It focuses on the future.** The plan is underpinned by extensive research on the long-term trends that are going to affect the tourism industry in the future.
- **It has been developed from the ground up.** The plan was developed through a series of industry workshops where each destination discussed and debated the trends that will affect their future, and what they want their destinations to be in the future.
- **It has statewide commitment.** Common themes across all our destinations were distilled to develop a vision for the state as a whole, and this was tested with delegates at the 2013 *DestinationQ* forum.

# Megatrends that will shape our future

We can't predict the future, but we can prepare for it.

Change is inevitable. The exact conditions and priorities that will prevail in 20 years time, and how these will impact on the global tourism industry, are largely unknown.

However, there is evidence of some of the big shifts, or 'megatrends', that are likely to shape the industry over the coming decades and we can use these to set the context for long-term planning.

Working with the Queensland Government, CSIRO undertook a foresight study to identify and understand the megatrends that will affect the Queensland tourism industry.

These megatrends are signposts of the changing economic, social and environmental circumstances that affect people's travel choices, including their propensity to travel and what they desire and expect while travelling. They warn us of potentially turbulent times and point to opportunities to fast-track our success.

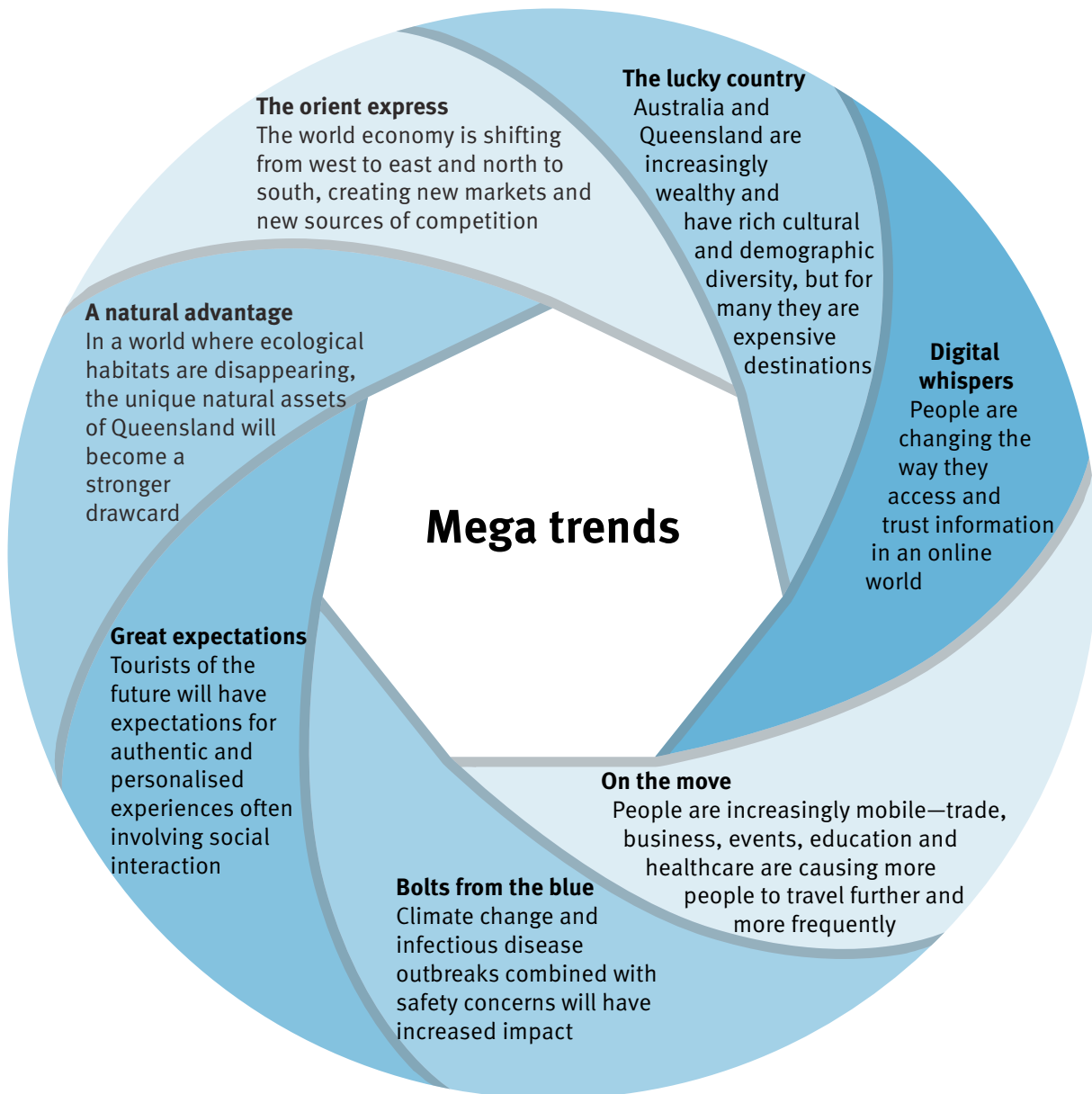
The foresight research identified seven megatrends in our future:

1. **The orient express**—The world economy will significantly change over coming decades. Rapid income growth within emerging economies will create new markets and new sources of competition. There are major growth opportunities through attracting new tourists from the developing Asia region and ensuring Queensland is a differentiated and aspirational destination for domestic and international travellers.
2. **A natural advantage**—Global biodiversity is decreasing. Natural habitats are disappearing at alarming rates, and remaining areas of pristine natural habitats are increasing in value. As the world's population grows and becomes more urbanised, tourists will be drawn to nature-based experiences. Queensland's natural assets will become an increasingly important drawcard for locals and visitors alike.
3. **Great expectations**—As incomes grow, people shift their discretionary expenditure towards experiences rather than products. Future tourists will seek experiences that are personalised, 'authentic' to the destination and its people, involve social interaction and create emotional connection.
4. **Bolts from the blue**—Sudden and unexpected events such as extreme weather and infectious disease outbreaks are more likely in a world with a changed climate, antimicrobial drug resistance and increased human mobility. When combined with the growing importance of safety perceptions, these events will have both positive and negative impacts on Queensland tourism expenditure, depending on where they occur in the world and the perceptions potential travellers have regarding their impacts.
5. **Digital whispers**—In the digital age, models of human communication and decision-making are changing. Information flows much more rapidly and via more widely distributed channels than it did in even the recent past. The perceived credibility of information sources is also changing. The online world has created new risks and opportunities for the tourism sector.
6. **On the move**—People are becoming increasingly mobile. While leisure remains a strong motivator for travel, people are travelling further and more frequently for many reasons including trade, business, events, conferences, education and healthcare. Technological advances in the transport sector, particularly aviation, will enable the continued rise in mobility as people are able to move greater distances faster.
7. **The lucky country**—Queensland and Australia have weathered the financial turbulence of the last decade exceptionally well compared to many other countries. However, for some travellers, they are expensive destinations. Local tourism operators face higher costs than many overseas competitors.

From the convergence of these megatrends, the study identified five defining characteristics Queensland could capitalise on to differentiate its product and capture increased market share in a highly competitive global market. These characteristics are that Queensland is safe and secure, clean, green, friendly and authentic, and worth it.

These megatrends were used as a centrepiece of the engagement process to provide context about our future world. It is in this context that the Queensland tourism industry is making decisions about its future.

To be competitive, we need to look ahead, adapt, and grow to meet changing circumstances.



## The 20-year plan structure

The 20-year plan is about what needs to happen for the tourism industry in Queensland to be competitive and successful in the long term. It consists of the vision, strategic directions and action plan.

**Vision:** This is what Queensland tourism wants to be in the long term—it is our preferred future. It is not a tagline, but what we want to be known for—it describes what success looks like. It is supported by vision statements across six key themes.

**Strategic directions:** These are what all partners who are committed to the success of tourism will do over the medium to long term to make the vision real.

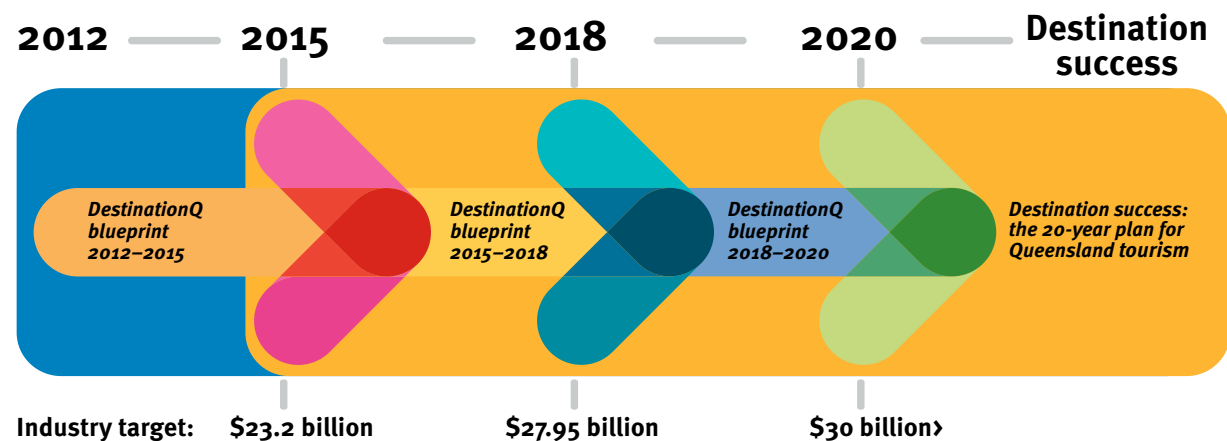
**Action plans:** These outline what partners will do over a shorter period (1–2 years) to implement the strategic directions in the 20-year plan. The actions may be statewide or implemented through destination tourism plans.

## The timetable for change

This 20-year plan builds on 18 months of strong, focused and collaborative work by industry and government.

We started in 2012 with the inaugural *DestinationQ* forum and the first *DestinationQ* blueprint. We established a 2020 industry target to reach \$30 billion in overnight visitor expenditure per annum and identified milestones so we can track our progress toward this target.

A lot has been achieved, but there is still a lot to do.





## Our vision for success

We started our 20-year journey by identifying where we want to go.

In other words, when developing a long-term plan for tourism in Queensland, we started with generating an industry view of what we want tourism in Queensland to be known for. We identified the things that are important to us and what will position the Queensland tourism industry to be competitive and successful over the long term.

This is what defines our destination.

Our destination is not a place—although from a consumer perspective, Queensland has a rich tapestry of destinations that offer variety and wonder to travellers, both domestic and international.

Our destination is success, and our success is built on our destinations.

### In our vision for tourism in Queensland:

- 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 vision recognises the many facets of tourism. It focuses on how growth in tourism will directly contribute to the economic, social and environmental future of all Queenslanders.

This is a vision for destination success.

It has been created in partnership with industry and can only be achieved by working together.

## Tough but achievable

This is not going to be easy. If it was, it wouldn’t be visionary.

It will take a lot of effort, and time, and change. But together we are up for it—our partnership is ready for the journey ahead.

Members of the industry were surveyed about the importance of the vision to the future success of tourism in Queensland. Their responses created industry ratings for the vision and its six themes showing how important the vision statement is to industry and how much change is required to achieve the vision.

### Industry ratings



Importance (5.5)



Amount of change needed (4.0)

By working together, we might even reach our destination sooner than planned. By knowing where the industry wants to go, we can look for ways to fast-track our success, avoid distractions and detours, and combine our efforts towards an agreed and desired future.

## Six themes to direct our effort

In this section, the six themes of our 20-year vision are explored.

Each theme is introduced with a **profile**. Here, the **vision statements** reflect our desired future within this theme and **industry ratings** (derived from a survey of *DestinationQ* forum delegates) show how important this theme is to industry and how much change is required in this theme to achieve our vision.

The **overview** outlines the scope and focus of the theme. It is followed by the theme's **strategic directions**, which were developed from contributions of delegates at the 2013 *DestinationQ* forum. These directions are the things we need to do over the medium to long term to achieve the industry's vision for the future. They were voted by delegates as the most important areas to develop and are supported by comments made by industry members about their aspirations for this theme.

The displayed quotes **from specific destinations** are drawn directly from regional workshops. These are examples of ideas that received the most support from workshop participants and were used in developing that particular theme.

### 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



## Build strong partnerships

### Our vision

Industry and governments will work in partnership at all levels, unified in their approach to support the growth of tourism.

The tourism industry will have strong leadership that works collaboratively across other industries, with communities and towards a common long-term vision.

The community will be ambassadors for tourism, welcoming visitors and recognising the benefits that the industry brings to Queenslanders.

### Industry ratings



Importance (5.1)



Amount of change needed (4.7)

### Townsville

‘Tourism engages with the community and other industries in the region so they understand the industry’s value and are part of the visitor experience.’



### Gladstone

‘Strong relationships between local tourism organisations, council and regional tourism organisations will ensure common direction and unity and focus on tourism.’



### Overview

This theme is about building a collaborative approach—across the industry, with governments and with the community. This involves building relationships and trust and working towards agreed objectives. It requires a level of accountability and transparency. It is about all parties contributing and having ownership of the vision and outcomes. Our joint planning is underpinned by research and insights, allowing us to make well-informed, long-term decisions.

The aspirations of the industry need to support those of the community. This will encourage greater community participation in the industry—as local ambassadors and as tourists across the state. It will also ensure that growth in tourism directly contributes to the development of vibrant, well-developed communities.

The *DestinationQ* industry–government partnership is an example of how this approach, when implemented effectively, is delivering results.

## Strategic directions

1	<b>Integrated approach</b>	<p><b>Work together and with governments to ensure effective planning, policies and investment for the life of the 20-year plan.</b></p> <p>Growing tourism requires a strong partnership between governments and industry. This partnership needs to include industry and all levels of government—federal, state and local.</p> <p>All partners are focusing on jointly achieving our target and delivering the 20-year plan. The partnership will be underpinned by long-term planning, policies, funding and investment over the next 20 years.</p> <p>This work will build on the tourism industry – Queensland Government partnership, and extend this to local government. The destination partnerships between Tourism and Events Queensland and regional tourism organisations will deliver on destination priorities. The needs of tourism will be included in long-term, whole-of-government planning processes.</p>
2	<b>Community engagement in tourism</b>	<p><b>Engage the community to make tourism everybody's business.</b></p> <p>Tourism is everybody's business and to meet our target we need welcoming and engaging communities.</p> <p>Building partnerships between the tourism industry and the broader community and obtaining community acceptance and support for tourism is essential to building sustainable communities.</p> <p>There are opportunities to improve the community's understanding of the social and economic benefits of tourism so that destinations can better plan for the needs of tourism. As part of destination planning, there is an opportunity for local government to align tourism development with community aspirations and broader regional and state tourism priorities.</p> <p>Tourism has the opportunity to bring communities together—to instil a sense of community pride and knowledge of their history. We will harness this through our community volunteers and our network of visitor information centres, and through inspiring locals to consider their role in how the community presents itself to visitors.</p>
3	<b>Collaborative culture</b>	<p><b>Create an industry-wide collaborative culture that puts the customer experience first.</b></p> <p>We need to build our collaborative culture.</p> <p>A prosperous destination is one that is supported by a strong collaborative foundation—a committed tourism community and industry working together within the destination.</p> <p>Visitors are not just purchasing an individual product or a series of unconnected events, they are looking for a memorable experience—one that makes them say they felt like they 'experienced the destination'. Visitors care little about boundaries, so by working together across destinations and between regional tourism organisations, we will create a culture within the tourism industry and community where everyone is an advocate.</p> <p>Clustering of products within destinations and working together to 'build a unique experience' for the visitor will lead to recommendations to others and possibly repeat visitation.</p>
4	<b>Market intelligence and research</b>	<p><b>Inform decision-making with data, research, intelligence and insights.</b></p> <p>Businesses need to understand their customers, who they are and what they want.</p> <p>In a changing world, most tourism businesses are too small to undertake their own research or to locate and interpret the available data. Assisting an industry comprised of mainly small businesses by providing industry intelligence is a role for government agencies.</p> <p>We can enable and empower our businesses with data-based insights into Queensland's visitors, emerging trends and competitors. This will improve decision-making and facilitate more effectively targeted marketing, thereby improving the return on investment across the state.</p>



## Preserve our nature and culture

### Our vision

Natural assets will continue to be the heart of the Queensland experience—able to be enjoyed by visitors and locals alike, and preserved for future generations.

Our unique, authentic character and cultural heritage will be preserved and enhanced, and will always be at the heart of the Queensland experience.

### Industry ratings



Importance (5.1)



Amount of change needed (3.7)

### Mackay

‘We will preserve our natural, cultural and heritage assets, and the sense of adventure and stories that goes with that.’



### Hervey Bay

‘... our natural, iconic marine and terrestrial assets and local character ...’



### Overview

This theme recognises that people and places are at the heart of the Queensland tourism experience.

With rainforests, beaches, rivers, the outback, the Great Barrier Reef and a diverse array of marine and land animals, our natural assets are second to none. We must manage these assets effectively to enable access today and ensure they are still here for future generations.

We also want to show visitors who we are as Queenslanders. We have a rich cultural heritage, home to Aboriginal and Torres Strait Islander peoples. Our early settler history and modern multicultural society further expands our appeal. Visitors want authentic insights into this history and our communities.

We need to be creative and develop experiences that support and showcase these natural assets and our heritage. We want to develop experiences that immerse visitors in the beauty of Queensland and encourage an emotional connection. This includes using events (such as festivals) to bring people together in our picturesque landscapes. It involves a focus on education to help visitors understand and value our environment, wildlife and history. It requires investment in infrastructure and facilities that enable visitors to experience our protected areas with minimal impact.

## Strategic directions

1	<b>Maximise opportunities</b>	<p><b>Maximise the tourism opportunities of heritage, arts, culture, nature and Indigenous tourism experiences.</b></p> <p>Queensland has a rich cultural heritage that involves our natural attractions, Indigenous history and culture, colonial history, and modern arts in high-quality venues such as the Southbank cultural precinct. These have the potential to attract many more visitors looking for a different experience of Queensland. We should focus on and promote these to provide a further range of attractions for visitors. Highlighting our heritage, arts, culture, nature and Indigenous experiences will give visitors additional reasons to visit, stay longer and spend more.</p>
2	<b>Infrastructure in national parks</b>	<p><b>Enable access to our national parks through appropriate infrastructure.</b></p> <p>Queensland has iconic natural assets, including World Heritage-listed rainforests and the Great Barrier Reef. The conservation, sustainable management and presentation of such areas are important aspects of our competitiveness in the global tourism market. To succeed we need to invest in infrastructure to unlock and showcase our natural and cultural assets.</p> <p>We need to grow visitation by diversifying the experiences available within our regions and investing in infrastructure to access and explore our national parks. Infrastructure is more than the physical, and our actions need to address the human element required to deliver an authentic experience.</p> <p>The growth in visitation needs to be balanced with the need to safeguard our natural assets. We can achieve this strategic direction by drawing on the knowledge and expertise of key stakeholders and acting on their input through effective planning.</p>
3	<b>Events in protected areas</b>	<p><b>Use events to activate and showcase our iconic natural experiences.</b></p> <p>Events can create memory-driven moments in our destinations. Many national parks and beaches feature some of Queensland's most outstanding natural attractions, which set us apart from our competitors on a global stage.</p> <p>A range of events are already hosted in our parks throughout the state, such as the annual Oxfam Trailwalker and Kokoda Challenge, and Queensland is well positioned to develop and deliver additional events in our natural settings to enhance the visitor experience.</p> <p>Through the delivery of innovative, inspirational and memorable events in areas managed by the Queensland Parks and Wildlife Service, new and existing audiences will have new opportunities to re-engage with our natural experiences and extend their stay.</p>





## Deliver quality, great service and innovation

### Our vision

We will deliver authentic, quality experiences with a local feel and high standard of service, showcasing the best of the Queensland spirit—friendly, welcoming and down to earth.

Our industry will be led by career-oriented professionals who are passionate about tourism and their communities.

Our operators will be technologically smart, connected and efficient, doing business better and reaching consumers in new and innovative ways.

### Industry ratings



Importance (5.5)



Amount of change needed (4.2)

### Sunshine Coast

‘We will keep pace with the expectations of our target markets by providing quality experiences and services, enabling access and providing vibrant, fun communities.’



### Airlie Beach

‘We will deliver authentic, quality experiences with a local feel and high standard of service—we will not change who we are even as our visitors change.’



### Rockhampton

‘Operators stay at the forefront of technological and social change to maximise recognition of their region and their own profitability.’



### Overview

This theme focuses on delivering our visitors a quality experience that is value for money. It requires tourism businesses to focus on the standard of service they offer and to draw on new business systems and innovations that help them deliver high-quality experiences at an affordable cost. It demands a workforce that is well trained and passionate, with the drive of seeing tourism as a career, not just a job.

Word-of-mouth recommendations from visitors now reach further and faster than ever before. These recommendations are often given greater credibility than the information in official brochures and advertisements. Good reviews bring people in and operators need to know how to manage bad reviews. The ability to effectively manage this social media environment is crucial. Operators need an effective online presence that enables consumers to research, book and pay for experiences.

## Strategic directions

1	<b>Digital capability and uptake</b>	<p><b>Develop the world's best digital tourism systems and integrate technological innovations across all tourism businesses.</b></p> <p>In the digital world we can all be positioned on a technology adoption spectrum. We may be 'innovators' or 'early adopters', or follow the majority of people who embrace innovation once it's proven.</p> <p>We need to ensure our digital capabilities are ahead of the pack. Innovation is critical to success in a world where the use of technology is now a key element of how visitors plan, select and purchase a holiday, and then engage with a destination once they have arrived. More and more consumers expect a seamless digital experience.</p> <p>We need to ensure everyone is moving forward with technology, including infrastructure that keeps up with demand and human skills to use it. There is a need to ensure training programs for Queensland tourism businesses remain relevant, keep pace with trending technologies and address content gaps. Continual review and analysis of programs including delivery methods is also required and will help inform both business practice and digital infrastructure needs.</p>
2	<b>Workplace relations</b>	<p><b>Improve the competitiveness of tourism by advocating for workplace relations reform.</b></p> <p>Workplace relations reform is integral to improved competitiveness and success in delivering quality, service and innovation in the tourism industry.</p> <p>Much of the tourism sector is labour intensive, and the efficiency and effectiveness of workplace relations in businesses will have a direct bearing on the quality and consistency of service and innovation. The modern award structure does not adequately reflect the vital '24/7' nature of businesses and employment needs of the tourism industry, which operates inclusive of weekends, public holidays and evenings.</p> <p>Current modern award provisions impact upon the tourism and hospitality industry's capacity to engage in part-time employment, and can deter business from creating or retaining various positions. Increasing operational costs also reduces capital reinvestment opportunities for businesses.</p> <p>To maintain service quality and to remain a competitive tourism destination, the industry requires operational flexibility in the modern award, particularly in relation to penalty rates and ordinary hours of work—to achieve the goal of creating a labour environment that supports reinvestment in our product, and our people.</p>
3	<b>Service culture and quality</b>	<p><b>Deliver a quality service culture and standard.</b></p> <p>Queensland's service culture needs to exemplify the best the world has to offer and deliver a consistent, quality experience.</p> <p>Service quality covers all facets of the tourism experience, from the perspective of the customer, the business, its employees and the destination, as well as other suppliers in the service industry.</p> <p>Industry will embrace the concept of best practice, with Queensland developing and adopting a standard of excellence to deliver value and world's best quality. This standard should inspire high quality in all segments of the industry and recognise, award and celebrate best practice. We will identify champions—leaders in quality service culture—who can serve as examples. A service quality standard will drive the skilling of the tourism workforce and encourage sustainable operators for our future. Government programs have a role, but this must be industry led, supported and used. Accreditation is one part of this overall approach. In the first instance, there is opportunity to galvanise an industry service culture through an agreed quality service framework for Queensland.</p>



**Identify workforce priorities to meet the needs of industry.**

We need the right people with the skills and dedication required for operators to deliver a quality service. It will require upskilling of our existing workforce, and raising the profile of tourism as a career of choice to attract and retain new employees.

We need to provide career-oriented jobseekers and young people with information about what and where opportunities exist in tourism. Industry, in partnership with the Queensland Government, has taken steps to address high turnover rates and change the perception workers have of career paths in the tourism and hospitality industry from offering ‘just’ casual jobs to viable long-term career options. We will be working to lift the profile of tourism and promote tourism to jobseekers and the broader community as a long-term career option.

We will deliver quality service and standards by maintaining government’s focus on tourism in key areas including skills, labour and career development.

Tourism will be a future career of choice—it will attract and retain good-quality staff who are committed to high standards.



## Target a balanced portfolio of markets

### Our vision

Visitors from Australia and around the world will aspire to visit our destinations many times, exploring the diversity of our state.

We will target a balanced portfolio of markets that match our competitive strengths and deliver the best results for our destinations.

We will always look to the future, understanding and acting on consumer trends to appeal to traditional markets and grow new markets.

### Industry ratings



Importance (5.3)



Amount of change needed (4.2)

### Cairns

‘Traditional markets while growing new markets—diversify including appropriate pitch to different markets ...’



### Gold Coast

‘Ensure delivery of markets, not all eggs in one basket. Convention conference the key ...’



### Overview

This theme recognises that the world is changing, and will change significantly over the next 20 years.

Rapid growth in emerging economies is creating new opportunities for Queensland tourism. Asian markets, including China and India, are creating a new generation of international travellers. This is a global opportunity and we must work hard to successfully position Queensland’s destinations as aspirational locations for new and returning international travellers.

We need to balance our focus between this growth in Asia and the need to maintain our important western markets. We cannot afford to overlook our visitors from Europe and North America, and our domestic travellers. Domestic travel to Queensland represents 70% of the state’s visitors and we must actively work to retain and grow this market into the future.

The world is changing rapidly and our ability to target new and emerging markets, while balancing the needs of traditional markets, will be critical to our long-term success.

## Strategic directions

1	<b>Domestic markets</b>	<p><b>Preserve and grow the value of the domestic market.</b></p> <p>The domestic market remains the ‘bread and butter’ of the industry.</p> <p>While seeking to grow our global markets, we must remember to always support the many Queenslanders who holiday in the state and the many other Australians who visit Queensland. Our marketing should highlight our variety of destinations and experiences and those destinations should cross-market and onsell to promote other parts of Queensland. It is good business to look after the local customer and it will be important that Queenslanders understand, support and promote their local product.</p>
2	<b>Events and experiences to drive repeat visitation</b>	<p><b>Deliver innovative and unique events and experiences to drive repeat visitation.</b></p> <p>Reinvigorating our tourism offering with events will require an examination of our customers, including what they want and what will attract them to come back.</p> <p>Queensland needs a vibrant and engaging events program—a program that will build upon unique experiences in destinations. Our regional and major events program can support both our regional hero experiences and Brand Queensland.</p> <p>In partnership, event organisers, industry, regional tourism organisations and government can develop distinctive events and a statewide program that enhances the visitor experience before, during and after an event, encouraging extended length of stay and repeat visitation.</p>
3	<b>International markets</b>	<p><b>Position Queensland as a premier international destination by ensuring our brand emotionally connects with a global audience.</b></p> <p>Reaching our target requires a clear strategy to target the global source markets that will deliver the greatest contribution to overall visitor expenditure.</p> <p>We need to ensure Queensland’s destinations and holiday experiences ‘emotionally connect’ with our global visitors. We need to leverage our reputation as a warm, welcoming destination with captivating stories and iconic and hero experiences. We can use our brand as a call to action so our visitors can act as ambassadors and spread the word to the world about our state’s first-class tourism product and experiences. Our approach requires government, industry and local communities working together to establish Queensland as a premier destination, firmly putting Queensland on the world stage.</p>



## Offer iconic experiences

### Our vision

We will focus on the consumer, and the experiences we offer will create lifelong memories.

Our destinations will build on and leverage their strengths and heroes—iconic people, places and events—giving visitors many reasons to stay, explore and return.

Our hero experiences and icons are our points of difference, and this is what we will showcase.

### Industry ratings



Importance (5.2)



Amount of change needed (3.8)

#### Roma

‘We will work together, across boundaries, to package our products so we are the entry point to the outback/north and a place to stay a while.’



#### Bundaberg

‘We offer unique engaging experiences and events and great service that turn a one-time visitor into a lifetime advocate for the area.’



#### Longreach

‘... warm, close, welcoming, memory-driven destination featuring the pioneering spirit of the region and its legends, past and present ...’



### Overview

This theme looks at Queensland’s signature experiences and the icons and heroes that are the anchors of our value proposition to consumers.

Iconic experiences are built on the hero experiences in each of our destinations. They represent more than goods and services—they are a new level of visitor experience providing a lasting encounter to be remembered.

We have something to offer travellers, whether they are looking for adventure, relaxation or something they can’t do anywhere else in the world.

## Strategic directions

1	<b>Destination events strategies</b>	<p><b>Nurture and support destination events.</b></p> <p>Events are more than just a calendar reminder—they are a perfect opportunity for people to come together, share an experience and form lasting memories. Events give visitors a reason to stay, explore and return which provides major benefits to the host destination.</p> <p>We can achieve this by actively nurturing and supporting events within Queensland’s tourism planning system, developing a statewide approach with participation by all tourism stakeholders and fostering an ongoing commitment to deliver events.</p> <p>Events create an emotional connection between people and places, a powerful link that is shared by those who attend. By nurturing and supporting events in Queensland it is possible to maximise the benefits and grow regional tourism destinations.</p>
2	<b>New and renewed products</b>	<p><b>Develop new and existing products to deliver experiences of quality and value that consistently delight the customer.</b></p> <p>Developing high-quality products, both new and existing, across Queensland is critical to delivering on visitor expectations.</p> <p>These products need to be consistently high quality, raising the standards of Queensland tourism in all corners of the state. To foster and facilitate the development of best practice new products, we need a distributed model of product development.</p> <p>The development of new products should be driven at a destination level, leveraging off the hero experiences of each destination. At a local level, local industry and councils can help match products to markets and provide pragmatic local business intelligence, supported by a strong understanding of what makes the destination unique.</p>
3	<b>Leverage icons</b>	<p><b>Recognise and leverage icons and use product clustering to build visitation.</b></p> <p>The consumer must be at the centre of product development.</p> <p>Consumers are attracted by icons that evoke passion and create memories—authentic people, places and events. Icons are determined by the consumer, not by the industry, and may cross geographic boundaries.</p> <p>We will recognise and leverage a few key iconic experiences that connect with consumers. These icons will be identified for particular markets—international and domestic.</p> <p>We will then unite behind these icons, clustering products around them to build visitation. Dispersal from icons will drive yield and visitation at a regional level. Implementing this approach has already started, with all destinations developing their hero experiences and engaging in product clustering.</p>



## Grow investment and access

### Our vision

Well-planned, timely public and private infrastructure will enable tourism growth and visitor access.

The ability of the industry to invest and innovate will be encouraged through the continued reduction of unnecessary red tape.

### Industry ratings



Importance (5.6)



Amount of change needed (4.4)

### Brisbane

‘... government investment in infrastructure—to drive/encourage private investment in product ... government with a long-term vision and commitment ...’



### Toowoomba

‘... access to and within the region a priority ...’



### Overview

This theme recognises investment as a key driver of quality. These investments need to be focused on the consumer to drive demand, led by industry and supported by governments. Investment in new and renewed tourism infrastructure, facilities and products is needed to ensure Queensland is recognised as a quality destination.

We need to focus on improved connectivity, both physical and virtual. How easily visitors can get to and around our destinations has a big impact on visitor dispersal. Increasingly, most travellers want easy and affordable internet access while travelling. This means we need the digital infrastructure and services in place to enable visitors to search for experiences, conduct business and engage with their social networks.

We need to stimulate confidence in the Queensland tourism industry to encourage the private sector to invest in tourism developments, large and small. This involves removing unnecessary red-tape and providing streamlined services.

## Strategic directions

1	<b>Digital infrastructure</b>	<p><b>Focus investment in our digital presence and accessibility.</b></p> <p>Maintaining high visibility in the global digital economy is critical to success. Potential visitors need to be able to access current and compelling high-quality information to compare offerings, book experiences and pay for them online. We need to make our tourism businesses more visible and accessible by building their digital skills, pushing for better infrastructure and providing free wi-fi to visitors. In a continuously changing digital world, maintaining competitiveness will be an ongoing challenge.</p>
2	<b>Investor confidence</b>	<p><b>Remove barriers to investment by reducing costs and stimulating investor confidence, ensuring Queensland has a competitive global advantage.</b></p> <p>To compete globally and achieve our target, Queensland needs investment and reinvestment in tourism assets.</p> <p>We need the right products to meet the needs of our target markets, particularly emerging markets in Asia.</p> <p>Queensland will build investor confidence by developing a reputation as a pro-investor culture and demonstrating a globally competitive return on investment. Building on the success of the past, we will focus on improving the pro-business environment in Queensland through ongoing red-tape reduction, improved certainty of tenure and further planning reform. We will actively attract and facilitate investment and reinvestment, and get the message out that Queensland is open for business for tourism.</p>
3	<b>Transport modes and systems</b>	<p><b>Deliver a sustainable multimodal transport system that provides safe and equitable access to our destinations and iconic experiences.</b></p> <p>Access is critical to Queensland's future tourism performance.</p> <p>We require a transport system that provides safe and equitable access and allows tourists to easily move around the state to visit our destinations and iconic experiences. We need the right mix of transport options to meet the needs and expectations of all our visitors.</p> <p>Our effort needs to focus on building on our recent successes in aviation and drive tourism through linking people to places and delivering a sustainable multimodal transport system.</p> <p>This approach will improve the visitor experience, and maximise the network efficiency and capacity of our integrated transport system. To do this, we will continue to influence transport investment to build aviation linkages, enhance drive tourism and ensure new cruise infrastructure is available to provide tourists with a seamless transport experience.</p>

## Delivering the 20-year plan

We can only achieve our vision, implement our strategic directions and celebrate success by working as a team. The long-term success of tourism in Queensland will be driven by industry, and government will help deliver the change required.

By signing a partnership agreement, the Queensland Government and Queensland Tourism Industry Council have formed a partnership to grow Queensland tourism. Together we will deliver innovative, high-quality products and experiences that meet consumer expectations and enhance Queensland's tourism competitiveness.

### Strengths of our partnership

- **A long-term approach**—We have a 20-year plan to guide future priorities for tourism.
- **Annual action plans**—These will guide implementation of the 20-year plan.
- **A destination focus**—We will empower our destinations to plan for their future, and deliver and invest in the activities needed to achieve their goals.
- **Shared targets**—We will focus all efforts, statewide and at a destination level, on increasing overnight visitor expenditure to \$30 billion per annum by 2020.
- **Accountability**—We will review our progress and report annually through a 'state of the industry' report.
- **Coordination**—We will ensure efforts to build tourism are coordinated between governments and industry.

### Accountability

Our journey together will be transparent and we will hold each other accountable for our actions.

The Tourism Cabinet Committee will focus on achieving cross-agency coordination and delivering tourism growth. The committee is empowered by the Queensland Government's commitment to grow tourism as a pillar of the economy. It is scheduled to meet jointly with the Queensland Tourism Industry Council board twice a year.

The *DestinationQ* Post-Forum Working Group includes industry representatives and government officials and is tasked with overseeing our journey. The group actively monitors our progress and drives us towards our strategic directions by responding to obstacles and maintaining our pace.



## Tracking our progress

An annual ‘state of the industry’ report will review our progress against the following measures.

<b>2020 industry target</b> 	<b>Visitor numbers</b> 	<b>Regional dispersal (visitor numbers)</b> 
<p>Total overnight visitor expenditure in Queensland year ending quarterly 2000–20 (actual and projected against target and forecast)</p> <p>Source: IVS &amp; NVS, TRA</p>	<p>Total overnight visitor numbers to Queensland year ending quarterly</p> <p>Source: IVS &amp; NVS, TRA</p>	<p>Total overnight visitor numbers to Queensland’s tourism regions (ABS definition) year ending quarterly</p> <p>Source: IVS &amp; NVS, TRA</p>
<b>Economic contribution</b> 	<b>Employment</b> 	<b>Airline capacity</b> 
<p>Tourism contribution to total GSP 2006/7–2012/13</p> <p>Source: TSA, TRA</p>	<p>Tourism contribution to total employment 2006/7–2012/13</p> <p>Source: TSA, TRA</p>	<p>Measure of airline capacity (total Queensland and by major airport)</p> <p>Source: BITRE</p>
<b>Hotel capacity</b> 	<b>Digital uptake</b> 	<b>Visitor satisfaction</b> 
<p>Measure of hotel room capacity (total Queensland and by destination year ending quarterly 2003–13)</p> <p>Source: ABS</p>	<p>Number of Queensland tourism operators on ATDW (TBC)</p> <p>Source: ATDW</p>	<p>Measure of visitor satisfaction (TBC)</p> <p>Source: IVS &amp; NVS, TRA – visitor satisfaction of overall value for money (IVS &amp; NVS), customer service (IVS only), and attractions and activities on trip (NVS only) year ending quarterly 2012–13</p>





## More information



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