Brisbane Visitor Economy Strategy
A Destination Tourism Plan for Brisbane
2014-2020
Brisbane Visitor Economy Strategy: Overview

The Challenge
The ambitious goal of doubling the value of Brisbane Region tourism by 2020 will not be achieved by incremental thinking. It will require us to be audacious and change the game. This strategy provides the blueprint for an ambitious city determined to become a renowned destination.

The Opportunity
- An economy on track to double in size in 20 years
- Proximity to an Asia middle class of more than one billion within 20 years
- An unprecedented body of precinct and infrastructure building
- A united region working as a team to optimise results
- A renewed determination to build a highly compelling city events and cultural schedule.

The Pathways
- 1.5% annual business visitor growth off the back of economic growth
- 1.5% VFR annual growth off the back of population growth
- 7.4% lift from longer stays from improved precincts
- 14.8% international visitor increase from improved air access
- 6% visitor increase from improved events and marketing
- 1.7% increase from international student growth
- 4.6% growth from improved industry quality
- 1% increase from new international marketing
- 1.5% annual growth in business event visitors.

The Benefits
- 80,000 new jobs
- Boost of $4.5 billion in economic activity
- Talent and investment attraction
- Better facilities for locals and visitors
- Unified TEAM Brisbane partnership across the Greater Brisbane region.
Executive Summary

The Visitor Economy Strategy underpins the partnership of Brisbane’s tourism industry, Greater Brisbane Councils and the Queensland Government and the shared commitment necessary to meet our goal of growing the value of our industry to $8.4 billion by 2020, and creating 80,000 FTE employment opportunities for our people. While recognising the scale of this challenge, the Strategy sets out our ambition to be a serious player in the global visitor economy.

Our Vision

By 2020 Brisbane will be recognised as a serious player in Asia Pacific. It will be Australia’s most welcoming, spirited and energised subtropical capital city, offering world-class major events, coastal, island and countryside experiences.

Our Positioning

We will gain renown and a global reputation as a tourism destination that is;

- A rising new world city in Asia Pacific offering a compelling and inclusive blend of quality of life, lifestyle and culture
- Friendly, safe, engaging and accessible
- A fascinating and accessible mix of river’s edge, urban precincts, bayside villages, islands, urban bushland, hinterland environs and expansive inland waterways and fertile countryside
- An innovative leader in tourism experiences and high-quality service delivery
- A gateway to Australia’s natural advantages in terms of its natural assets.

Brisbane aspires to be Australia’s new world city, an ambitious, lifestyle-friendly, socially-inclusive and technology-enabled metropolis inhabited by a friendly, engaging and talented population. As a city, we do things our own way but we are open to building our future in partnership with the world. We are seeking to create a captivating ensemble of city experiences, spiced up with a unique Brisbane flavour.

What’s more, our economic growth, compelling investment opportunities and appeal to students give us a magnetic attraction for a vast range of activities that can be used as a leverage point for visitation. This situation is enhanced by our ideal location as a “stargate” between the Asia Pacific and the West as we move deeper into the so-called “Asian century”.

The tourism economy is a critical pillar of Brisbane’s aspiration as a new world city, enabled by maximising connections and networks and effectively targeting key source markets, both international and domestic to achieve the goal of doubling tourism expenditure by 2020.
Our Pathways and Priorities

Growth in Brisbane’s visitor economy will be built on action that seeks to;

**Build on strong economic foundations:** delivering increased investment and tourism demand
1. Support investment in major infrastructure projects across the region to increase average length of stay.
2. Work with Brisbane Airport on a **coordinated route development strategy** that aligns with the economic growth and leverages existing and other relationships.
3. Promote the **development of products and precincts** that embrace the region’s outdoor and active lifestyle including roof-top bars, cultural programs and deliver a 24 hour city and outdoor event spaces.

**Leverage the destination advantage:** delivering improved visitor experiences
4. Extend the ‘Give me Brisbane Any Day’ campaign into local, VFR, interstate and event promotion to lift preference and visitation to the region.
5. More actively promote the destination for business events (MICE) and leverage the positive attributes of the city and its lifestyle.
6. Grow and attract significant leisure events to create a more compelling, year-round events calendar, and create a city bid fund for events through Team Brisbane approach.
7. Develop improved visitor wayfinding, to build and improve connectivity, access and ease of orientation for visitors.

**Embrace Brisbane’s natural advantage:** delivering competitive advantage
8. Develop a clear marketing proposition for target markets, including international, and implement via a destination marketing plan.
9. Increase investment by partners in promoting the region as an ideal location for leisure visitors and international students through targeted marketing programs.
10. Targeted international promotion, leveraging existing investments by the airport, local government, TEQ and Tourism Australia to increase the average length of stay of identified international markets.
11. Identify gaps in the regional transport and telecommunications infrastructure to support day touring and drive trails. Invest in way-finding and digital infrastructure to build intra-region connectivity.
12. Encourage the development of new and improved products and experiences to showcase the region’s natural attributes and increase the accessibility of natural areas including helicopter and marine tours, new island and hinterland accommodation.

**Our Goals**

We are seeking to grow the value of the visitor economy from **$4.8 billion to $8.4 billion by 2020 - an additional $3.6B** in overnight visitor expenditure to support a total of **80,000 FTEs**.
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VISITOR ECONOMY STRATEGY IMPLEMENTATION
The Visitor Economy Strategy is complemented by an accompanying tactical document containing goals, catalyst projects and strategies for the whole of the region. This live working document will guide strategy implementation and will be reviewed and revised with agency and industry partners on an ongoing basis.

ACKNOWLEDGEMENTS
Images used throughout the document are courtesy of Tourism and Events Queensland and Brisbane Marketing.

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THE CURRENT BRISBANE VISITOR ECONOMY

1st choice business destination in Queensland with 33% share (ahead of Southern Queensland Country and the Gold Coast) and 3rd in Australia behind Sydney and Melbourne

2nd most popular overnight leisure destination in Queensland behind the Gold Coast

1st choice daytrip destination in Queensland ahead of Gold and Sunshine Coasts

17,000 visitors stay in the region every night (6.1M per annum) injecting $13.6M a day into our economy ($4.8B per annum)

Supports approximately 65,000 jobs (6% of all jobs in the region)

...our aim is to **lift overnight visitor expenditure to $8.4 billion per annum supporting 80,000 jobs by 2020.**
Introduction

The ambition to maximise industry potential and double the value of tourism by 2020 demonstrate our determination to be a serious global player in the visitor economy.

Tourism and events are already major economic drivers. Overnight visitors inject $4.8 billion of direct expenditure into the broader destination’s economy, which includes the cities of Brisbane, Ipswich, Logan and Redland and the Moreton Bay, Lockyer Valley, Somerset and Scenic Rim regions. The visitor economy stretches well beyond just leisure and holiday visitors and includes events, business travel, working holidays and visiting friends and relatives, as well as travel for a purpose such as education and health.

This strategy underpins the partnership of Brisbane’s tourism industry, Greater Brisbane Councils, the Queensland Government and key agencies such as Brisbane Airport Corporation, Brisbane Convention and Exhibition Centre and the shared commitment necessary to meet our goal of growing the value of our industry to $8.4 billion by 2020.

Success in meeting the 2020 ambitions will mean;

- Growing visitor expenditure from $4.8B in 2013 to $8.4B by 2020 a 75% increase on current performance
- Growth in tourism employment to 80,000 FTEs
- Attracting 1.1 million additional domestic overnight visitors per year
- Attracting 691,000 additional international visitors per year
- The region will need 3043 additional hotel rooms above and beyond current planned supply.

Once-in-a-generation events such as the 2014 G20 Leaders Summit offer the opportunity to achieve a step-change in Brisbane’s evolution as a new world city. This plan provides strategic direction and identifies the key growth opportunities for the region as a whole. It leverages off existing strategic roadmaps, including the City Centre Master Plan, River’s Edge Strategy, Brisbane Economic Development Plan 2012 – 2031 and strategic documents across the region, providing the definitive direction for tourism and events towards 2020. The plan highlights the commitments needed to deliver the promise behind our positioning as a new world city and leader in Asia Pacific.

In striving towards this goal, we recognise the scale of the challenge in terms of the actions, resources and commitment required from the whole of our industry working together. In order to meet this target, we need to harness our industry’s innovative and entrepreneurial spirit, and focus activity around three catalytic areas;

1. Building on the strong foundations of continued economic and population growth - delivering increased investment and tourism demand
2. Leveraging the region’s destination advantage - delivering improved visitor experiences
3. Embracing Brisbane’s natural advantage - delivering competitive advantage.

Clear positioning in our target markets is essential if we are to be successful in stimulating new demand to drive growth. A committed partnership of businesses, communities and public sector partners harnessed by strong leadership will be required if economic potential is to be fully delivered.
Achieving the 2020 target will result in Brisbane attracting a predicted **29% increase in visitation** equating to an additional 1.75 million visitors.

Source: Deloitte Access Economics
Our Vision

By 2020 Brisbane will be recognised as a serious player in the Asia Pacific. It will be Australia’s most welcoming, spirited and energised subtropical capital city, offering world-class major events, coastal, island and countryside experiences.

Brisbane aspires to be Australia’s new world city, an ambitious, lifestyle-friendly, socially-inclusive and technology-enabled metropolis inhabited by a friendly, engaging and talented population. As a city, we do things our own way but we are open to building our future in partnership with the world. We are seeking to create a captivating ensemble of city experiences, spiced up with a unique Brisbane flavour.

What’s more, our economic growth, compelling investment opportunities and appeal to students give us a magnetic attraction for a vast range of activities that can be used as a leverage point for visitation. This situation is enhanced by our ideal location as a “stargate” between the Asia Pacific and the West as we move deeper into the so-called “Asian century”.

A strong corporate market has historically been the main driver of demand in Brisbane, and the city has attracted approximately 15 per cent of all international leisure visitors to Australia. During 2013 however, the city and region as a whole experienced growth in both international and domestic leisure visitors; demonstrating the profile and popularity of Brisbane as a leisure destination is on the rise.

Brisbane’s visitor economy is growing strongly, particularly in key segments including leisure and events travel, and Asian tourism;

- 4.3 million visitor nights in 2013
- 21.8% per annum growth in Chinese visitors since 2008
- 10% increase in leisure travellers staying in hotels in 2013
- International students generated $3.77 billion in 2012 ($1.4 billion in annual course fee revenue and $2.3 billion in annual value-added economic activity), supporting 20,000 FTE positions.

However, despite the scale of current activity and its success in contributing to Brisbane’s thriving economy, from a tourism perspective it is still hindered by outdated and misinformed perceptions.

Together, all industry partners need to build on our already strong foundations to deliver an even greater contribution to Brisbane’s economic growth, liveability and quality of life.

Tourism benefits from a virtuous relationship with a thriving Brisbane economy, represented by increased investment and availability of capital, talent attraction and a growing population base;

- A thriving economy and growing population create increased demand for tourism products and relationships
- Tourism experiences and attributes contribute to creating the renowned Brisbane lifestyle and building attractiveness as a place to live, invest and do business.

The vision for the visitor economy and how we define ourselves as a destination is built on this virtuous relationship. This does not mean that we have to build standalone tourism attractions to deliver world class visitor experiences. It means continued investment in, and innovative delivery of experiences and destinations which are part and parcel of Brisbane’s unique urban and social fabric i.e. the features, attributes and world-class entertainment, cultural, dining and retail precincts that set Brisbane apart as a new world city.
Beyond the reach of Brisbane’s CBD and surrounding community is a vast tapestry of community life spread across seven distinct regions. Each region brings with it its own unique assets which, combined with Brisbane City, provide a wealth of visitor experiences.

We have a generational opportunity in terms of large-scale infrastructure and business investment, where accompanying co-operative marketing investment will unlock its full potential for the visitor economy. The opportunity for our industry to maximise diversification of Brisbane’s economy and global connection to leverage stronger visitor expenditure growth in both domestic and international markets is available.

Brisbane is set to experience above national average economic growth over the next six years, and the scale of planned investment for the region as a whole is substantial. When viewed alongside infrastructure investment which has taken place over the past decade, this is recognised as a tipping-point for Brisbane’s long-term growth prospects.

Through delivery of strategic infrastructure and investment priorities across the region, the visitor economy will benefit from enabling investment of over $25 billion in public and private capital over the next 5 – 6 year period. We are aspiring to create a new world city where the visitor economy is an integral pillar of our success story. To do so, we do not need to build standalone visitor attractions. We need to position the visitor economy so that it leverages the full benefits of positive socio-economic conditions and large-scale infrastructure and private investment.

Major public and private sector investment across the region is taking place – in transport...
infrastructure, accommodation, attractions and in precincts and public realm improvements. Allied with the forecast economic growth, this investment will deliver a step change in our core economy and infrastructure which in turn will generate sustained and tangible long-term growth in the visitor economy.

Destination Positioning

Brisbane is a modern and diverse subtropical metropolis, which aspires to be Australia’s new world city. Our friendly, engaging and talented population thrive in a city which is lifestyle-friendly, socially-inclusive, accessible and technology-enabled.

We are seeking to create a captivating mix of visitor experiences, spiced up with a unique Brisbane flavour and accompanied by the added value and depth created by unique offers from across our region.

We will gain renown and a global reputation as a tourism destination which is;

- A rising new world city in Asia Pacific offering a compelling and inclusive blend of quality of life, lifestyle and culture
- Friendly, safe, engaging and accessible
- A fascinating and accessible mix of river’s edge, urban precincts, bayside villages, islands, urban bushland, hinterland environs and expansive inland waterways and fertile countryside
- An innovative leader in tourism experiences and high-quality service delivery
- A gateway to Australia’s natural advantages in terms of its natural assets.

Figure 2: Positioning Against Key Attributes

<table>
<thead>
<tr>
<th>A great destination</th>
<th>A serious player</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure/ Tourism</td>
<td>The 2014 G20</td>
</tr>
<tr>
<td>Major events</td>
<td>Leaders Summit</td>
</tr>
<tr>
<td>Precincts</td>
<td>Investment</td>
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<tr>
<td>Greeters</td>
<td>attraction</td>
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<td>Study Conventions</td>
<td>Start-ups</td>
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<td>Digital</td>
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<td>Brisbane</td>
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<td></td>
<td>Innovation scorecard</td>
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<td></td>
<td>APSA</td>
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</tbody>
</table>

‘New World City’ is used as a descriptor and aspiration for how Brisbane is presented to target audiences. It has been designed to help the city challenge outdated perceptions and compete on a global stage, not solely with other domestic state capitals.

Brisbane, Australia’s New World City underpins the city’s other established and emerging marketing messages, descriptors and destination messages in relation to business, investment and community audiences.

The city has had success in establishing itself in the international education, investment and business events sectors through the use of Study Brisbane, Invest in Brisbane and Meet in Brisbane. The Choose Brisbane campaign is utilised to underpin initiatives targeting the business events, international study and investment sectors, and to position Brisbane as a serious player in the Asia Pacific.

In the context of leisure, the focus is on the ‘energised’, ‘enterprised’ and ‘self-assured’ attributes that resonate with our leisure audiences. However, while positioning is clear for domestic markets, there is a gap in the region’s positioning for international leisure visitors.

‘Give me Brisbane Any Day’ has been established to provide a focus for domestic leisure market messaging to stimulate future demand to the region – for interstate and intrastate markets, messaging aims to reinforce Brisbane’s liveability, overlayed by a strong events focus.
Brisbane Airport Corporation has the objective to position Brisbane Airport as the ‘Gateway to Australia’. However, as has been noted, there is a gap in the region’s positioning for international leisure visitors. Brisbane is recognised as a gateway to Queensland but it can also establish a clear market position in its own right with regard to overseas leisure markets. This will provide the opportunity to add value and generate synergies between initiatives targeting international students, business events, investment and leisure markets. Positioning to international audiences will be built on the key lifestyle attributes, cultural and natural assets and develop compelling reasons to visit in terms of events and visitor experiences.

In positioning itself to international leisure audiences, Brisbane also has the opportunity to lead the way in showcasing its world-class talent and intellectual capital, innovative spirit and wealth of investment opportunities. The visitor economy has a role to play alongside sectors such as the resources, professional services, education and agribusiness industries in driving the growth and expansion of the city to enhance its reputation on the world stage.

The unparalleled opportunity provided by the 2014 G20 Leaders Summit gives the tourism industry the perfect springboard from which to build its profile in international markets. Tourism can take a cue from its part in the Global Cafe, in designing and setting out its future.

**City-Region Positioning**

The CBD is positioned at the heart of the Greater Brisbane region and South East Queensland as a whole. It performs a natural role as hub and pre-eminent service centre and the airport as the state’s principal interstate and international gateway.

The city and the surrounding region benefit from a mutually advantageous relationship in terms of complementary experiences and demand generation. Development and successful application of signature local experiences within the overall Brisbane framework will help draw out distinctive visitor experiences which add value for the region as a whole.

When partnerships are successful in facilitating connectivity and buy-in, the sum of the whole region as a destination is greater than that of its individual parts.
Target Markets

To grow and prosper as a destination and to achieve the $8.4 billion aspiration for 2020, the following are key target markets for growth of the Brisbane visitor economy:

CITY

Leisure
Primary:
• 400km drive market (Regional Qld/NSW)
• Visiting friends and relatives
• Event visitors
• Interstate visitors (including fly-drive and long-haul drive)
• Asia and traditional western markets.

Secondary:
• International students
• Participation sports tourism and events
• Shopping visitors
• Niche: outdoor adventure, recreation and nature-based activities, arts and cultural experiences
• Youth (international and domestic).

REGIONAL BRISBANE

Leisure
Primary:
• Brisbane residents
• 400km drive market (Regional Qld/NSW)
• Visiting friends and relatives
• Event visitors (primarily Brisbane and regional Qld).

Secondary:
• Interstate visitors (fly-drive/ long-haul drive)
• International FIT landing in Brisbane (including Asian markets)
• International students
• Participation sports and events
• Niche: outdoor adventure, recreation and nature-based activities, arts and cultural experiences
• Group touring (seniors, international, etc)
• Youth (international and domestic).

Business (both City and Regional)
Primary:
• National Associations (Sydney, Melbourne, Canberra)
• International Associations (primary is UK/Europe, secondary is US)
• National Corporates.

Secondary:
• International incentives (China/ South East Asia via the Brisbane in Asia Strategy).
**Challenges and Opportunities**

Despite the city’s success in creating an attractive environment as a place to live, study, visit and do business in, it must continually evolve to grow its reputation on a global stage. At a macro level, CSIRO identified seven key trends that will shape growth of the visitor economy throughout Queensland. When considered alongside regional supply and demand factors, there are key issues that will shape future demand.

**GROWING ASIAN DEMAND: THE ORIENT EXPRESS**

Rapid growth in Asian economies is creating new markets and new sources of competition;

- Asia is increasingly making a greater contribution to global wealth creation
- Over a billion people in the Asian region will cross the income threshold to middle class over the coming 20 years.

**Implications for Brisbane**

The Asian Market currently makes up 34 percent of Brisbane’s international visitors & 52 percent of international visitor nights, an increase of 6 percent and 5 percent respectively since 2009. Although this market only makes up 2 percent of total visitation to Brisbane, this share has risen by 26 percent in the past five years.

In order to capitalise on the anticipated future growth and its proximity to these markets, Brisbane must have a clear Asian market strategy including;

- Establishing a clear leisure market proposition for overseas markets, building on strong existing market presences in business events, investment and international education markets
- Developing new and improved products and experiences which meet the expectations of Asian markets
- Continuing to position itself as a serious player in the Asia Pacific, including hosting high profile events such as Asia Pacific Screen Awards (APSA), Brisbane Asia Pacific Film Festival (BAPFF), Asia Pacific Triennial of Contemporary Art (APT), and the Asia Pacific Cities Summit, which builds our profile and credibility.

“Asia Pacific is the economic powerhouse of the world and hosting APSA, APT and BAPFF strengthens Brisbane’s proposition as the new world city – not just of Australia – but of the Asia Pacific”

— John Aitken, CEO Brisbane Marketing
THE BRISBANE ENVIRONMENT: A NATURAL ADVANTAGE

In a world where ecological habitats are disappearing, the unique natural assets of Queensland will become a stronger drawcard;

• Globally, climate change, poor management and urbanisation will continue to threaten biodiversity
• Queensland has rare and world heritage natural assets, and the means to preserve them
• Lack of QuEST accredited nature-based tourism product, aligning with QPWS permit expectations.

Implications for Brisbane

Brisbane can showcase its wealth of urban, coastal and hinterland experiences to visitors;

• Brisbane has exceptionally strong assets in terms of its national parks and World Heritage Listed areas, with 23 National Parks, Moreton Bay Marine Park and one World Heritage Area (Gondwana Rainforest World Heritage Area) within 150km of the CBD. D’Aguilar National Park is located only 20 minutes from the CBD, and three of the world’s largest sand islands – North Stradbroke, Moreton and Bribie Islands are all within easy reach for visitors
• By positioning itself as a capital city with pristine natural environments, Brisbane can stand out from other capital cities. An imperative is ensuring that more operators take up the necessary QuEST permits and accreditation
• Wayfinding and initiatives to improve connectivity will be key to enabling visitors to enjoy the wealth of experiences available to them across the region. The Brisbane Welcomes the World destination welcoming and wayfinding program will provide impetus for the city to build on its reputation as one of the friendliest cities in the world. The program aims to ensure that as a destination, it provides visitors with a personal connection to the city and region, and its culture and events.

VISITOR DEMAND: GREAT EXPECTATIONS

Tourists of the future will have expectations for authentic and personalised experiences often involving social interaction;

• People’s social media networks are a way for them to make personal connections when they travel
• Consumers have access to increasing amounts of information in real time
• Consumers are taking more control and seeking personal interaction.

Implications for Brisbane

The need to deliver experiences which meet our lifestyle promise;

• Brisbane’s subtropical climate and relaxed outdoor lifestyle shape the region’s distinctive character that set it apart. Successful development of our city and regional tourism precincts is essential
• Developing the region’s distinctiveness through successful application and delivery of signature hero experiences
• Continued marketing via the ‘Give me Brisbane Any Day’ campaign message, maximising the impact of social media and user generated content as a central element of campaign activity
• Incorporating the need for personal interaction into destination welcome activities. The Brisbane Greeter program provides a key mechanism for providing visitors with a warm welcome and the opportunity for Greeters to share their intimate knowledge of the city
• Making Brisbane first choice for new investment and enterprise. Significant new private investment and public sector enabling investment is required if growth targets are to be achieved. The recognised shortage of quality branded hotel accommodation means we are already deferring 278,000 room nights every year.

NATURAL DISASTERS: BOLTS FROM THE BLUE

Climate change and infectious disease outbreaks combined with safety concerns will have increased impact. Major events such as extreme weather, political unrest, disease outbreaks and financial market fluctuations will continue to impact people’s travel choice.

Implications for Brisbane

Visitor economy partners need to be ready to respond in the event of a disaster or emergency;
• Businesses and destination managers need to monitor opportunities and be ready to respond, with imaginative marketing, packaging and pricing offers
• Businesses and destination managers need to be ‘disaster-ready’ and have resilience plans in place to avoid the nature and magnitude of visitor downturn associated with the 2011 Brisbane floods and other natural disasters and economic ‘shocks’.

A DIGITALLY CONNECTED WORLD: DIGITAL WHISPERS
People are changing the way they access and trust information in an online world;
• People are increasing their networks of trusted peers who inform their travel choices
• An operator’s digital presence and functionality is increasingly important.

Implications for Brisbane
The importance of the digital economy is explicitly recognised in the Digital Brisbane Strategy. As Australia’s new world city, Brisbane needs to have a digital state of mind and a burning ambition to lead, innovate and confidently embrace the future;
• The region needs to embrace a multi-channel approach to communication and promotion, including building business skills and capacity
• Appropriate digital and telecommunications infrastructure needs to be in place across the region to enable visitor economy businesses to compete on an even footing, and take advantage of new opportunities.

CONNECTIVITY AND ACCESS: ON THE MOVE
Humanity is increasingly mobile. In addition to travelling for holidays and leisure, trade, events, education and healthcare are causing more people to travel further and more frequently;
• People are more mobile, encouraged by low-cost airfares and reducing travel times
• More Australians are travelling overseas.

Implications for Brisbane
The region needs to support continued investment in its transport infrastructure;
• Delivery of new infrastructure throughout the region including the Bus and Train (BaT) Tunnel, Brisbane Airport, Legacy Way, Northern Rail Link, Warrego Highway are key
• Interpretation, wayfinding and marketing to make public transport more accessible and visitor-friendly.

LIFESTYLE ADVANTAGES: THE LUCKY COUNTRY
Australia and Queensland are increasingly wealthy. We are gifted with cultural and demographic diversity, but are expensive visitor destinations;
• The profile of the domestic tourist is changing – working harder, more educated, wealthier, older, and with greater international connections
• A safe and friendly destination, but expensive in a region of emerging, low-cost destinations.

Implications for Brisbane
The need to compete on quality, experience and service will have implications for investment decisions;
• Applying the unparalleled exposure generated by the 2014 G20 Leaders Summit and the impetus and fresh thinking exemplified in the Global Café
• The need to apply innovative practices to development and delivery of tourism services and experiences
• Challenges for businesses and investors in terms of lack of capital and difficulties in accessing capital.
Brisbane’s economy is forecast to grow by more than 60 per cent by 2031 to $217 billion.
2020 Goals

We are seeking to grow the value of the visitor economy from **$4.8 billion** to **$8.4 billion by 2020** an additional **$3.6B** in overnight visitor expenditure, supporting a total of **80,000 FTEs**.

*Figure 4: Composition of the $8.4B 2020 Target*

The growth strategies in the below table provide an indication of how the $8.4 billion target can be reached.

<table>
<thead>
<tr>
<th>Contribution</th>
<th>Strategy</th>
<th>Additional Value ($M)</th>
<th>% Contribution to Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Build on strong economic foundations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Base Economic Growth</td>
<td>Grow business visitors by 1.5% per annum.</td>
<td>$294</td>
<td>3.5%</td>
</tr>
<tr>
<td>2. Population Growth</td>
<td>Grow VFR visitors by 1.5% per annum.</td>
<td>$387</td>
<td>4.6%</td>
</tr>
<tr>
<td>3. Precinct Investment</td>
<td>Grow length of stay by 0.35 days.</td>
<td>$620</td>
<td>7.4%</td>
</tr>
<tr>
<td>4. Increased Air Access</td>
<td>Grow domestic air arrivals by 5.2% per annum. Grow international air arrivals by 5.4% per annum.</td>
<td>$1,244</td>
<td>14.8%</td>
</tr>
<tr>
<td>2) Leverage the destination advantage</td>
<td></td>
<td></td>
<td>5.9%</td>
</tr>
<tr>
<td>5. Lift Preference</td>
<td>Lift domestic visitor preference by 0.5% by 2020.</td>
<td>$318</td>
<td>3.8%</td>
</tr>
<tr>
<td>6. Grow Business Events</td>
<td>Grow business event visitors by 1.5% per annum by 2020.</td>
<td>$55</td>
<td>0.6%</td>
</tr>
<tr>
<td>7. Grow Leisure Events</td>
<td>Grow leisure event visitors by 1.5% by 2020.</td>
<td>$128</td>
<td>1.5%</td>
</tr>
<tr>
<td>3) Embrace Brisbane’s natural advantage</td>
<td></td>
<td></td>
<td>6.6%</td>
</tr>
<tr>
<td>8. Grow International Students</td>
<td>Grow international education visitors by 0.5% by 2020.</td>
<td>$139</td>
<td>1.7%</td>
</tr>
<tr>
<td>9. Increased Industry Quality</td>
<td>Grow spend per night above inflation by 0.75% by 2020.</td>
<td>$387</td>
<td>4.6%</td>
</tr>
<tr>
<td>10. Grow International Leisure</td>
<td>Grow length of stay for international visitors by 0.5 days.</td>
<td>$25</td>
<td>0.3%</td>
</tr>
<tr>
<td><strong>TOTAL ADDITIONAL VALUE</strong></td>
<td></td>
<td><strong>$3,598</strong></td>
<td><strong>42.8%</strong></td>
</tr>
<tr>
<td><strong>Current Value (2013)</strong></td>
<td></td>
<td><strong>$4,815</strong></td>
<td><strong>57.2%</strong></td>
</tr>
<tr>
<td><strong>TOTAL 2020 VALUE</strong></td>
<td></td>
<td><strong>$8,413</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
Implications for Brisbane

If the Brisbane region hits the 2020 growth target it will generate in excess of 10.4 million additional visitor nights with implications for;

Access
- These significant additional visitor volumes will have implications for road capacity and management at peak times
- Increased demands on public transport
- At Brisbane Airport, expanded route development, development of the second runway and continued infrastructure investment that supports additional air access will result in increased landside and connecting infrastructure needs.

Accommodation
- The Guide to Hotel Investment in Brisbane Australia 2014 identifies that the city already defers 278,000 room nights per year due to a shortage in supply of quality, branded hotels. The city will need 3043 additional hotel rooms above and beyond current planned supply (based on re-investment in new room capacity at 70 percent occupancy threshold). This is equivalent to 1,110,695 room nights
- A proactive approach attracting and facilitating new hotel investment will need to be maintained
- Parts of the region will also require new rooms to come on stream to meet forecast demand across a range of accommodation types including backpackers and nature-based/eco resort accommodation.

Attractions
- The projected increase in visitor numbers will need to be accommodated in management plans and planning schemes to support new attractions and visitor precincts
- Alongside visitor attractions, implementation of the Brisbane Event Strategy and regional event strategies will support a program of events over peak, shoulder and off seasons, providing new reasons to visit
- There is also a need for proactive promotion of development opportunities to unlock investment and attract capital.

Other Infrastructure
- A range of other infrastructure and services, from signage and public conveniences to town and coastal planning will need to respond to the growth
- A comprehensive approach to wayfinding as a key enabler for visitor orientation. As well as incorporating physical signage, and access to people trained to provide quality advice, wayfinding will also utilise digital, online and wi-fi technology tools
- A co-ordinated ‘whole of Brisbane’ approach to destination planning is required in order to deliver a compelling set of experiences which entice new visitors and encourage repeat customers. A first step is engaging partners and raising awareness of the projected tourism growth.

Community
Results from the 2013 Social Indicators Survey indicated a positive view from residents towards tourists and the visitor economy. Communities will need to be active players in the visitor economy if its potential is to be delivered;

- Tourism growth will at least in part be focused on certain locations and hotspots. Communities will need to be engaged in those areas as key delivery partners and stakeholders
- VFR will continue to be an important growth market – this is most effectively influenced by working at the community level by building awareness of facilities and activities
- A friendly welcome is always an important part of the tourism experience. Communities will be stakeholders in delivering this
welcome. Team Brisbane will need to be activated, building on the Brisbane Welcomes the World program.

**Destination Workforce**
Research by Deloitte Access Economics indicates that the Brisbane tourism workforce is under pressure from other sectors and will experience a significant shortfall by 2020, if growth is as forecasted. The sector is forecast to support 80,000 FTEs;
- Workforce development will be a key determinant in helping the Brisbane region stand out from the crowd and achieve its 2020 ambitions
- Workforce skills and training – ensuring that those employed in the sector are able to meet increasing visitor service expectations.
Brisbane’s Strategy for Growth

The strategy which will underpin achievement of the 2020 target, growing visitor expenditure from $4.8B, has three key components:

1. **Build on strong economic foundations:**
   *delivering increased investment and tourism demand*
   
   Brisbane is set to experience above national average economic growth over the next six years. The visitor economy will benefit from investment of over $25B of private and public capital.

   Continued growth in Brisbane’s overall economy, improved attractiveness for investors and the forecast population expansion are key demand drivers for the visitor economy. This is underpinned by investment in vital new infrastructure including roads and public transport, attractions, and in expanded airport capacity and continued route network development.

2. **Leverage the destination advantage:**
   *delivering improved visitor experiences*
   
   As population growth continues, locals need to become advocates for Brisbane and events need to be used to showcase its positive attributes.

   To fully deliver the potential of the visitor economy, demand from target markets needs to be stimulated and the quality and depth of visitor experiences developed. Through carefully targeted and co-ordinated marketing activity, tourism partners working together can intervene to grow the market. It is in this area where visitor economy partners can intervene to the greatest effect to grow our sector and contribute to overall economic wellbeing.

3. **Embrace Brisbane’s natural advantage:**
   *delivering competitive advantage*
   
   The region is blessed with world-class marine and hinterland national parks (including world heritage rainforest) that offer a breadth of natural and cultural experiences. These raw assets need to be harnessed with improved products, new experiences and promotion into new markets.
The city will **need 3043 additional hotel rooms** by **2020** above and beyond current planned new developments.

Source: Based on Australian Bureau of Statistics, Deloitte Access Economics, and Tourism Forecasting Committee estimates
Delivering the Strategy – Enablers of Growth

1. **Partnership and collective buy-in** to stimulate the market and develop a compelling set of tourism experiences is a pre-requisite if the 2020 vision is to be achieved.

*Industry, communities and public sector partners all have defined roles to play if 2020 ambitions are to be delivered;*

**Communities**
- Becoming ambassadors for Brisbane, selling the liveability of our destination
- Brisbane Greeters and Brisbane Welcomes the World provides the mechanism for business and resident communities being activated to lead Team Brisbane, becoming ambassadors for Brisbane and strengthening the connections between tourism and other sectors of the economy and community life.

**Public Sector Partners**
- Working collaboratively through Brisbane Marketing, Tourism and Events Queensland, and Tourism Australia to grow demand
- Continuing to provide a pro-investment culture, supporting new investment in the visitor economy
- Continuing to support greater aviation capacity and new route development
- Working with operators to create and promote itineraries that highlight the destination’s natural advantage and hero experiences

- Adopting and investing in best practice in physical and digital wayfinding and visitor welcome initiatives.

**Industry**
- Investing in, and delivering high-quality experiences which convey Brisbane’s marketing promise
- Being active partners in stimulating demand in target markets – buying in to destination marketing and experience development programs.

If Team Brisbane is successful in growing the market, collective buy-in and commitment to co-operative marketing programs and investing in new and improved visitor experiences is essential. Brisbane will not deliver on its potential without this collective buy-in.

2. **Co-operative Marketing Investment Required to Drive Demand.** A significant element of the strategy needed to deliver the 2020 growth target is based on stimulating demand and being marketing-driven.

We have a generational opportunity in terms of large-scale infrastructure and business investment, where accompanying co-operative marketing investment will unlock its full potential for the visitor economy. A major opportunity exists to maximise diversification of Brisbane’s economy and global connection to leverage stronger VFR in both domestic and international markets.

**Commitment to significantly increased levels of co-operative marketing by partners across the region businesses and councils and other public sector stakeholders, is a pre-requisite if the region is to meet its 2020 economic goals for the visitor economy.**
Substantial tourism-related infrastructure, investment and the delivery of major events coupled with sustained marketing investment is required to shift the market in terms of preference for Brisbane as a destination in order to grow visitor numbers. Research indicates that preference for Brisbane in the domestic overnight segment has remained relatively stable over the past decade, albeit that as identified in the Brand Equity Index, this is coming off a low base.

A sustained step-change in levels of marketing investment to grow preference for Brisbane as a destination is required to capitalise on the available 2020 growth opportunities.

3. For the sector to deliver on its growth potential, it is recognised that access to capital will be required. Accessing capital, whether it is venture capital, private equity or institutional funds, can be challenging – and an existing shortfall of funds management expertise is an area that will need continued support. However, the proactive approach being taken to attracting investment in new quality hotel stock as identified in the Guide to Hotel Investment in Brisbane Australia 2014 demonstrates that tangible progress is already being made.

4. Leverage Brisbane - Australia’s New World City branding, and events such as the 2014 G20 Leaders Summit to challenge and change outdated perceptions of the region.

5. Utilise our existing strengths by better linking the region’s business travellers and business events with leisure experiences to increase yield and length of stay.

6. Support the work of Queensland Tourism Industry Council (QTIC) and Tourism Transport Forum (TTF) in lobbying for workplace reform to recognise that the tourism, retail and services industries are a seven day-a-week industry.

7. Ensure that local planning schemes and state regulations continue to enable and support new products and experiences.

Delivering the Strategy – Strategic Relationships

The role and economic contribution of tourism and events in the region has been well recognised and incorporated into a wide range of corporate planning, economic and social strategies.

The visitor economy has been established as a key pillar in strategic planning, economic development and community documents throughout the region, including Brisbane Economic Development Plan; Brisbane City Centre Master Plan; Creative Brisbane, Creative Economy; Inclusive Brisbane and River’s Edge Strategy.

A wide range of partner bodies, individuals and groups at federal, state and regional level have a stake in contributing to Brisbane’s 2020 growth target (Figure 5). The visitor economy will also have a role to play in contributing to the strategic ambitions of a wide range of agencies and businesses in addition to community quality of life.

A strong alliance of public, private and community partners is required to deliver growth. Collective ownership of strategic tourism objectives will enable delivery of a coordinated set of high-quality visitor experiences.

Productive partnerships between businesses, communities, public sector agencies and destination managers will pave the way for cooperative marketing and destination development which delivers the region’s 2020 goals.
Figure 5: Key Stakeholder Relationships in delivering the Visitor Economy Strategy

- **FEDERAL**
  - Tourism Australia

- **STATE**
  - Tourism and Events Queensland
  - Dept. State Development, Infrastructure and Planning
  - Dept. National Parks, Recreation, Sport and Racing
  - Dept. Tourism, Major Events, Small Business and the Commonwealth Games
  - Dept. Transport and Main Roads
  - Arts Queensland, division of Dept. Science, Information Technology, Innovation

- **INDUSTRY**
  - Investors
  - Visitor economy businesses
  - Cultural institutions/venues

- **COMMUNITY**
  - Lockyer Valley Regional Council
  - Brisbane City Council
  - Logan City Council
  - Ipswich City Council
  - Redland City Council
  - Somerset Regional Council
  - Scenic Rim Regional Council
  - Moreton Bay Regional Council

- **REGIONAL**
  - Brisbane Marketing

- **LOCAL**
  - Brisbane Destination Tourism Plan
If Brisbane reaches its 2020 target of $8.4 billion in overnight tourism expenditure, the region will see a labour demand of 80,029 persons – a skilled labour shortage of 8476 individuals in 2020.

Source: Deloitte Access Economics
Build on strong economic foundations

*Brisbane is set to experience above national average economic growth over the next six years. The visitor economy will benefit from investment of over $25B in public and private capital.*

Growth will be driven by:

- 3% per annum economic growth
- 2% population growth driving trips and VFR
- 51.2M additional air seats predicted by 2030

**Catalyst Projects**

1. Support investment in major infrastructure projects across the region to increase average length of stay.

2. Work with Brisbane Airport on a coordinated route development strategy that aligns with the economic growth and leverages existing and other relationships.

3. Promote the development of products and precincts that embrace the region’s outdoor and active lifestyle including roof-top bars, cultural programs and deliver a 24 hour city and outdoor event spaces.
Build on strong economic foundations

Catalyst Project 1
Support investment in major infrastructure projects across the region to increase average length of stay.

Major public and private sector investment across the region is taking place – in transport, accommodation, attractions and precincts. These initiatives all contribute directly or indirectly as drivers of the visitor economy.

The ambition is clear. The scale of planned transport infrastructure investment for the region as a whole, and that set out in the City Centre Master Plan alongside private sector investment in new hotel stock is significant (see table, page 34). When viewed alongside infrastructure investment that has taken place over the past decade, this is recognised as a tipping-point for Brisbane’s long-term growth prospects. Tourism partners need to get behind and fully support this investment.

Brisbane is set to experience above national average economic growth over the next six years. In delivering the City Centre Master Plan priority projects and other initiatives, the visitor economy will benefit from investment of over $25 billion in public and private capital across a range of transport, accommodation, attraction and precinct/public realm initiatives.

Allied with the forecast economic and population growth, this investment will deliver a step change in our core economy and infrastructure which in turn will generate sustained and tangible long-term growth in the visitor economy.
Build on strong economic foundations

<table>
<thead>
<tr>
<th>Investment Area</th>
<th>City</th>
<th>Region</th>
</tr>
</thead>
</table>
| • Bus and Train Tunnel  
• Brisbane Airport  
• Legacy Way  
• Kingsford Smith Drive Upgrade  
• Kangaroo Point Bridge  
• Extended CityGlider network  
• Central & Roma Street Stations | • Warrego Highway and Interchange/ Brisbane Valley Highways interchange  
• Moreton Bay Rail Link  
• Darra to Springfield Rail  
• TSRC to north Toowoomba*  
• Logan Transport Infrastructure* | $10.95B |
| • QR South Brisbane, Richmont, TC Beirne, Rydges RNA  
• Emporium 2, Alpha Mosaic, Quest, NEXT  
• Gambaro, TRYP, Capri by Frasers, Four Points by Sheraton, Infinity | • Gatton Backpackers  
• Springfield Lake Hotel | $530M |
| • Queen’s Wharf  
24/7 Event City  
Howard Smith Wharves | • Toogoolawah Condensery  
• Kilcoy VIC  
• Kilcoy showground  
• Wivenhoe Hill walking trails*  
• Laidley Sport Centre  
• Gatton Aquatic Centre  
• Queensland State Equestrian Centre  
• Logan Shopping Centre investment* | $6.051B |
| • Queen, Edward, Adelaide and Elizabeth Streets  
• Supreme Court Site  
• Valley Heart and Centenary Place, City West and Petrie Terrace, Kurilpa, and Spring Hill  
• City’s Green Spine  
• Cultural Precinct* | • Flood-resistant concrete bridges  
• Solar research project  
• Redcliffe Seaside Village Rejuvenation  
• Caboolture Hub  
• The Corso at North Lakes  
• Robelle Domain  
• Strathpine Gateway Project  
• River Hearth Parkland  
• Moreton Bay University*  
• Loganholme Tourism Precinct*  
• Beenleigh Town Centre development*  
• Logan’s Major Shopping Centre updates | $5.949B |

Total $23.5B **  
Grand Total $25.9B  

* Investment value to be confirmed  
** Total investment figure is an estimate of planned major infrastructure and private sector investment, based on best available information at the time of publication
Build on strong economic foundations

Catalyst Project 2

Work with Brisbane Airport on a coordinated route development strategy that aligns with the economic growth and leverages existing and other relationships.

Brisbane Airport is a key gateway for the region – the vision is to be the ‘Gateway to Australia’. Route and capacity development is the critical factor in unlocking the potential growth in visitors from domestic and target overseas markets. A large proportion of overall visitor expenditure by 2020 will rely on air access – without it, interstate and international growth will not be delivered.

In 2013, Brisbane Airport’s 28 airline partners handled a record 21.8 million passengers, an average growth of 6.1 per cent per annum over the past 10 years since 2003. Australia’s third-busiest airport services 28 international and 44 domestic destinations, with more than 3760 scheduled direct flights each week.

Brisbane Airport Corporation began construction of a new parallel runway in 2013 as part of a $1.3 billion infrastructure investment. The addition of the new runway will see Brisbane Airport operate on the same level of capacity as airports in Singapore and Hong Kong, and upon completion in 2020 it will become the most efficient runway system in Australia.

Brisbane Airport operates curfew-free and offers around-the-clock capacity; allowing Brisbane to link to international networks hubbing from cities including Dubai, Singapore and Bangkok. The airport’s modern domestic and international terminals are linked by modern arterial roads (the newly constructed Airport Link Tunnel) and have a direct rail link to the CBD and the Brisbane suburban rail network.

A partnership among visitor economy stakeholders to stimulate market demand will complement the Airport and Carriers’ investment plans.
Build on strong economic foundations

**Catalyst Project 3**

Promote the development of products and precincts that embrace the region’s outdoor and active lifestyle including rooftop bars, cultural programs and deliver a 24-hour city and outdoor event spaces.

Brisbane City Centre Master Plan 2014 sets out the vision and five strategies that will shape the future direction of the city centre. In terms of implementation, the plan identifies a set of priorities for delivery over the next five years.

Brisbane boasts a number of distinct precincts and urban villages, each with its own distinctive feel and range of experiences for visitors – stretching from the city and inner suburbs to the bayside. Significant opportunities exist to develop the full potential of our precincts as tourism assets.

The City Centre Master Plan identifies the potential of our precincts to create enticing urban spaces. Major new investments include;

- **Queen’s Wharf, Brisbane** – a key opportunity for Brisbane to create a new precinct centred on an integrated resort that includes a casino, six-star hotel, retail, food and beverage and entertainment and convention facilities

- **Howard Smith Wharves** - Major public realm improvements for Howard Smith Wharves, to incorporate world-class retail, food and beverage and recreational offerings

- **Cultural Precinct** – Draft plans for the Cultural Precinct seek to transform it into an integrated ‘tourism, entertainment, innovation and cultural’ destination that includes a new theatre and an expanded museum offer. Its experience-led cultural entertainment focus will complement the Queen’s Wharf precinct

- **Albert Street** - Brisbane’s green spine, embodying the subtropical climate and outdoor lifestyle. This street will serve as a leafy boulevard connecting the City Botanic Gardens, King George Square and Roma Street Parkland.

The experiences which these and other precincts offer, will form core elements of the city’s overall proposition to target markets.

**Kurilpa Riverfront Renewal** - Redevelopment of Kurilpa Riverfront represents a major urban regeneration opportunity for the city. The Kurilpa Riverfront Renewal Master Plan will provide a framework for redevelopment and regeneration of a 25ha area of South Brisbane and one kilometre of river frontage to be leveraged for new accommodation facilities, public space, cultural developments and culinary experiences.
Build on strong economic foundations

Regional Priorities

Ipswich
- An increase in tourism opportunities, investment and employment for new and existing businesses through innovative product and infrastructure development
- A cohesive and collaborative tourism sector committed to the highest level of customer service and continual improvement.

Lockyer Valley
- Encourage growth in overnight visitors (targeting interstate and international visitors staying in Brisbane) to make investment in accommodation viable, and support and protect the rural landscape and lifestyle that attract visitors to come to the region.

Logan City
- Encourage investment in major facilities for the city including event facilities, wildlife tourism attractions, river tours, new business precincts, and an internationally recognised adventure hub
- Grow and attract events that will support investment in new products and accommodation, leveraging the region’s access and transport (including the highway) and the multicultural community.

Moreton Bay
- Increased economic contribution of tourism to the destination by converting more day visits to overnight trips.

Redlands
- Extend market share, length of stay and the value of tourism to the Redlands
- Establish a positive climate for sustainable development through town and strategic planning
- Encourage investment in tourism accommodation
- Develop a working group with industry and government representation to develop an overarching strategic plan for the transition from mining to tourism on North Stradbroke Island
- Create new precincts (destinations) that meet the needs of locals and visitors with tourism-orientated development, facilities, infrastructure and marketing.
- Improve connectivity through transport, communication technology, industry unity and education.

Scenic Rim
- Focus on growth in yield, not volume, to maintain the balance between tourism, community and the environment.

Somerset
- Increase the spend of every visitor to the region
- Attract more overnight visitors from Brisbane through effective promotion of activities and events to increase the region’s share of overnight trips taken from Brisbane supporting a broader range of accommodation options.
World-class infrastructure is a continuing driver of economic and visitation demand, with more than $25 billion worth of infrastructure under construction or in the pipeline.
Leverage the destination advantage

As population growth continues, locals need to become advocates for Brisbane, and events need to be used to showcase its positive attributes.

Growth will be delivered by:

Growing global traveller desire for **experience-led product** that is authentic to the destination

Advances in the transport sector allowing for **increased mobility** and access in trade, business events, conferences, education and healthcare. Interpretation, core messaging and greater access to transport needs to be imbedded into strategy.

**Catalyst Projects**

4. Extend the 'Give me Brisbane Any Day' campaign into local, VFR, interstate and event promotion to lift preference and visitation to the region.

5. More actively promote the destination for business events (MICE) and leverage the positive attributes of the city and its lifestyle.

6. Grow and attract significant leisure events to create a more compelling, year-round events calendar.

7. Develop improved visitor wayfinding, to build and improve connectivity, accessibility and ease of orientation for visitors.
Brisbane’s lifestyle advantages are exemplified in its world-class mature and developing urban precincts, and in the variety of experiences offered throughout the Greater Brisbane region. Targeted investment is required to stimulate demand in key market segments to fully leverage the economic potential of this lifestyle and environmental advantage.

**Catalyst Project 4**

Extend the ‘Give me Brisbane Any Day’ campaign into local, VFR, interstate and event promotion to lift preference and visitation to the region.

Visiting Friends and Relatives is an important market for city and region, accounting for 38 percent of trips at present. Significant growth in the population of South East Queensland is forecast – if the potential of this large resident population is fully leveraged alongside pride in the liveability of our city and region, growth can be delivered.

The region’s hero experiences provide the emotive connectors behind campaign activity. The campaign line has been developed with adaption and usage across Greater Brisbane at its centre i.e. Give me Moreton Bay Any Day, Give me Redlands Any Day.

**Catalyst Project 5**

More actively promote the destination for business events (MICE) and leverage the positive attributes of the city and its lifestyle.

Business Tourism is already a significant market for the Brisbane region, with 18 percent of all overnight visitors to the region coming for business purposes. Priorities include;

- Strategically – raising awareness and outdated perceptions of Brisbane
- Double the city bid fund through Team Brisbane approach
- Attracting new business events in target sectors
- Growing average length of stay via establishing a program of pre and post-itinerary trips
- Leveraging the benefits of the increase in conference capacity and facilities and key venues in recent years.

The sector will benefit from the application of strategies which seek to grow volume and value.

**Catalyst Project 6**

Grow and attract significant leisure events to create a more compelling, year-round events calendar.

Evidence that events are an economic development enabler is globally recognised and indisputable. Brisbane Events Strategy 2014-2020 demonstrates that events can help transform the Brisbane economy. With the historic success of the 1982 Commonwealth Games, Expo 88, the more recent Asia Pacific Screen Awards, and the upcoming 2014 G20 Leaders Summit and neighbouring 2018 Commonwealth Games – the potential opportunities and benefits presented by the correct type of events is apparent.

Significant resourcing is required to attract and deliver strategic and major events, however they are recognised as key economic, social and cultural enablers for Brisbane. Major events can play a leading role in reinforcing the city’s brand work, business and leisure offering and transformation of Australia’s new world city.
2

Leverage the destination advantage

The strategy conveys a new level of certainty for the city, as it positions Brisbane not just as a competitor in a highly competitive market, but as a destination that understands itself and has created a new set of rules. Analysis of both supply and demand (incorporating the macro and micro events industry, studies of destination success, existing events and identification of market gaps) have provided the foundation for the opportunities, mindset and strategy which will once again allow Brisbane to realise the true benefits of being a serious international events destination.

With Brisbane Marketing’s ambitions of improved economic and community vitality and the goals of 2020 in sight, we are in a strong position to become the thought leaders, rule breakers, game changers and history makers. The Brisbane Events Strategy prioritises events which have a direct ability to;

- Create short-term benefit and foster long-term legacies
- Increase visitation and assist with 2020 tourism targets for Brisbane
- Reinforce Brisbane’s position as Australia’s new world city, embrace the Team Brisbane philosophy and position Brisbane on an international stage
- Position Brisbane as a better place to visit, invest in, contribute to, learn from and stand behind.

A priority is to create a city bid fund for events through a Team Brisbane approach.

Core strategic focus - Leveraging, Developing and Procuring for Success;

1. Leveraging Current Events Calendar
2. Developing Major Events
3. Procuring new Leisure Events.

Catalyst Project 7

Develop improved visitor wayfinding, to build and improve connectivity, accessibility and ease of orientation for visitors.

Seamless journeys, ease of access and good intra-region connectivity are key considerations for all city destinations.

Public transport networks are primarily orientated towards resident and commuter needs and can be confusing and difficult to access for visitors. Routes do not always directly serve tourism precincts or attractions which have evolved since transport infrastructure was originally planned.

Many competitor and peer cities make public transport networks an attractive option for visitor journeys. Brisbane has a high-quality public transport network which continues to benefit from significant and ongoing investment, but if it is to live up to its new world city positioning, it is essential that world-class solutions are developed for;

- Integrated ticketing which meets with visitor needs
- Dedicated marketing and communications on transport options which provide confidence to visitors, making public transport a preferred travel choice which adds to the visitor satisfaction and the quality of visitor experiences
- Incorporation of class-leading interpretation and visitor information into existing and planned public transport hubs and routes, which improves usability from a visitor perspective
- Large-scale city events. The city already offers free public transport travel around major sporting events. Potential exists to consider extension of this model to include business and other key events within this holistic solution to visitor management, providing the city with a competitive edge in this regard.
These wayfinding and access initiatives incorporate both digital and physical infrastructure as well as the human touch provided by residents and consumer-facing employees.

Action on wayfinding is essential if Brisbane is to build its reputation as one of the friendliest cities in the world. Applying world’s best practice in physical signposting, geo-tagged digital applications, digital applications and access to people trained to provide quality advice are all elements to consider.

The Brisbane Welcomes the World program as part of the city’s hosting of the 2014 G20 Leaders Summit will provide a springboard for continued delivery in world-leading wayfinding programs.
Regional Priorities

Ipswich
- Council’s Tourism Branch supporting the industry to maximise opportunities to leverage sporting, business and cultural events
- Leverage the growing awareness of the Brisbane brand to grow leisure, events and business in Ipswich.

Lockyer Valley
- Encourage visitors to explore the region, not just pass through, by building stronger local partnerships and industry product knowledge, as well as improved signage and use of in-car technology
- Grow existing events and attract new events, leverage events to support the viability of local businesses and increase opening hours and keep local people at the centre of tourism growth.

Logan City
- Increase industry engagement and participation in marketing and distribution channels, leveraging Brisbane and upcoming events (2018 Commonwealth Games).

Moreton Bay
- Growth and development of tourism consistent with community values and lifestyle considerations, and by promoting a collection of Moreton Bay Adventure Experiences across the region as key events and an economic strategy.

Redlands
- Build a positive image for the region and support the local way of life while embracing our indigenous history and living culture
- Become a year-round destination leveraging our climate and range of activities and experiences
- Activate public spaces for festivals and events and actively assist event organisers to hold events in the Redlands
- Meet and exceed our customer expectations for tourism products, experiences and facilities.

Scenic Rim
- Develop distinctive and competitive tourism products and experiences in the region, with the flexibility and resilience to respond to future markets, environmental and social changes
- Strengthen collaboration and partnerships between Scenic Rim Regional Council, industry and other stakeholders.

Somerset
- Encourage every member of the community to be an ambassador for the region, and share places and products that encourage visitors to spend more (time and money).
Domestic tourism preference has remained relatively stable over the past decade, however further investment in preference growth is required if Brisbane is to meet its 2020 targets.

Source: Roy Morgan Research
Embrace Brisbane’s natural advantage

The region is blessed with world-class marine and hinterland national parks (including world heritage rainforest) that offer a breadth of natural and cultural experiences. These raw assets need to be harnessed with improved product, new experiences and promotion into new markets.

Growth will be driven by:

- The drawcard of Queensland’s wealth of biodiversity and natural habitats in an increasingly urbanised world.
- Increased international visitor desire for authentic cultural experiences, particularly in the Asian markets.

Catalyst Projects

8. Develop a clear marketing proposition for target markets, including international, and implement via a destination marketing plan.

9. Increase investment by partners in promoting the region as an ideal location for leisure visitors and international students through targeted marketing programs.

10. Targeted international promotion, leveraging existing investments by the airport, local government, TEQ and Tourism Australia to increase the average length of stay of identified international markets.

11. Identify gaps in the regional transport and telecommunications infrastructure to support day touring and drive trails. Invest in wayfinding and digital infrastructure to build intra-region connectivity.

12. Encourage the development of new and improved products and experiences to showcase the region’s natural attributes and increase the accessibility of natural areas including helicopter and marine tours, new island and hinterland accommodation, etc.
Catalyst Project 8
Develop a clear marketing proposition for target markets, including international, and implement via a destination marketing plan.

Brisbane is well established in investment, business events and international education markets and as a leisure destination for domestic markets.

A large proportion of new visitor expenditure up to 2020 is predicated on successfully growing international markets. If the potential of growing Asian and other international markets is to be delivered, a priority is establishing a clear international leisure marketing proposition, beyond that of being a gateway to Queensland.

The 2014 G20 Leaders Summit and the innovative thinking on show in the Global Cafe will be a springboard for Brisbane’s visitor economy to firmly establish itself on a world stage.

Catalyst Project 9
Increase investment by partners in promoting the region as an ideal location for leisure visitors and international students through targeted marketing programs.

Brisbane will strive to maximise its appeal to international students. Its liveability, workforce opportunities and lifestyle will set it apart as a first-choice destination for international students in the Asia Pacific region. Strategies will concentrate on growing both volume and value;

- Attracting greater numbers of annual enrolments/days spent in Brisbane by international students
- Growing international students’ economic contribution to the visitor economy through increasing VFR activity and direct expenditure
- Increased retention of talent and skills in the local workforce post-graduation, including raising employer awareness of opportunities.

Activity will seek to capitalise on;

- Generating positive referrals from existing student ‘ambassadors’
- The attributes that set Brisbane apart in terms of liveability and lifestyle in a competitive marketplace
- Collaborative marketing in-destination with leisure and business sectors where synergies are apparent
- Strong enabling partnerships with universities, TAFEs and English language schools.

The city is a focal point for overseas students but hubs are also developing in the Lockyer Valley and Moreton Bay regions.

Catalyst Project 10
Targeted international promotion, leveraging existing investments by the airport, Local Government, TEQ and Tourism Australia to increase the average length of stay of identified international markets.

International visitors are to play a significant role in achieving Brisbane’s 2020 target, accounting for 30 percent of the 2020 target continued strong performance is required from traditional European and North American markets, as well as delivering growth from target Asian markets. As well as attracting greater numbers of new visitors, focus should also be placed on strategies which seek to grow average length of stay.

If Brisbane is to deliver on its potential as a serious player in Asia Pacific and on a global level, where visitors are enticed to stay longer, this will require;

- Growth in direct and code share air services for the key inbound and growth markets
- Increased industry engagement and participation in international marketing
- Attracting investment in new products and experiences which appeal to our target markets.
3 Embrace Brisbane’s natural advantage

- Ensuring that connectivity and wayfinding in the city and across the region make it easy for visitors.
- Improvements to key tourist routes (road infrastructure and signage) are supported, as a means of increasing access and dispersal within the region, and growing intrastate, interstate fly-drive and long-haul drive, group touring and international self-drive markets.

Catalyst Project 11
Identify gaps in the regional transport and telecommunications infrastructure to support day touring and drive trails. Invest in wayfinding and digital infrastructure to build intra-region connectivity.

Making journeys seamless and easy for visitors is a key element in building high-class visitor experiences – this incorporates both digital and physical infrastructure as well as the human touch provided by locals.

In order to build cohesiveness across the region it is important that;
- Improvements to digital and communications infrastructure are supported. This infrastructure is essential to enable businesses to take full advantage of available market opportunities
- The region takes full advantage of cooperative marketing and communications opportunities to provide coherent messaging to target visitor audiences
- Improvements to key tourist routes (road infrastructure and signage) are supported, as a means of increasing access and dispersal within the region, and growing intrastate, interstate fly-drive and long-haul drive, group touring and international self-drive markets.

Catalyst Project 12
Encourage the development of new and improved products and experiences to showcase the region’s natural attributes and increase the accessibility of natural areas including helicopter and marine tours, new island and hinterland accommodation, etc.

Developing a breadth and depth of high-quality experiences across the region is key to building overall destination attractiveness and providing visitors with reasons to visit and increase average length of stay. The range of experiences available is a strength of the region. A priority will be to fully embed and bring the region’s hero experiences to life.

Businesses will need to innovate and continue to invest in developing their products, services and experiences if the destination as a whole is to succeed in persuading visitors to stay longer.
Regional Priorities

**Ipswich**
- Raise awareness and appeal of the Ipswich region as a leisure and event destination through collaborative promotion of the experiences, services and facilities available to visitors
- Improve ground transport options especially with regard to connectivity between attractions/tourism experiences.

**Lockyer Valley**
- Be known locally as a food tourism destination delivering fresh food directly to visitors through roadside stalls, farmers markets and restaurants/cafes using local produce
- Engaged farmers who are linked to tourism experiences, making ‘paddock to plate’ a reality and supporting and promoting the range of food tourism opportunities
- Raise awareness of the region’s unique experiences through greater publicity, cooperative marketing and industry participation, building the connections between farmers and artists to create new attractions and celebrating the unique character of each community.

**Logan City**
- Build a reputation for unique nature-based experiences
- Create and share positive perceptions of the city through experiences and events that build a clear, positive brand position and showcase unique experiences.

**Moreton Bay**
- United, cohesive tourism sector working to a clear brand and hero experience program that generates more publicity and marketing value creation through increased operator and stakeholder participation in cooperative marketing programs, leveraging established points of differentiation and competitive advantage.

**Redlands**
- Identify the experiences that provide the Redlands with a regional, national and international competitive advantage by leading marketing efforts around hero products
- Empower a coordinated tourism industry voice to help lead and drive tourism initiatives for the tourism sector in the Redlands.

**Scenic Rim**
- Protect and enhance the existing strengths of the region, including its natural environment, small country towns, rural landscapes and local communities consistent with the Scenic Rim regional brand
- Increase the use of local produce in restaurants, availability of fresh produce in roadside stalls and the value-added food and beverage products available in the region to increase the yield of existing visitors to the region.

**Somerset**
- Focus on the region’s natural assets of the lakes, the waterways and the uncrowded spaces
- Build an energised, enterprising and self-assured tourism sector working to a clear brand and set of hero experiences that generates more publicity and marketing value
- Deliver a better-quality range of facilities and level of service to encourage visitors to spend more and return.
Delivering Growth – Catalyst Projects

Growth in Brisbane’s visitor economy will be built on action which seeks to:

**Build on strong economic foundations**
*delivering increased investment and tourism demand*

1. Support investment in major infrastructure projects across the region to increase average length of stay.
2. Work with Brisbane Airport on a coordinated route development strategy that aligns with the economic growth and leverages existing and other relationships.
3. Promote the development of products and precincts that embrace the region’s outdoor and active lifestyle including roof-top bars, cultural programs and deliver a 24 hour city and outdoor event spaces.

**Leverage the destination advantage**
*delivering improved visitor experiences*

4. Extend the Give me Brisbane Any Day campaign into local, VFR, interstate and event promotion to lift preference and visitation to the region.
5. More actively promote the destination for business events (MICE) and leverage the positive attributes of the city and its lifestyle.
6. Grow and attract significant leisure events to create a more compelling, year-round events calendar, and create a city bid fund for events through Team Brisbane approach.
7. Develop improved visitor wayfinding, to build and improve connectivity, access and ease of orientation for visitors.

**Embrace Brisbane’s natural advantage**
*delivering competitive advantage*

8. Develop a clear marketing proposition for target markets, including international, and implement via a destination marketing plan.
9. Increase investment by partners in promoting the region as an ideal location for leisure visitors and international students through targeted marketing programs.
10. Targeted international promotion, leveraging existing investments by the airport, local government, TEQ and Tourism Australia to increase the average length of stay of identified international markets.
11. Identify gaps in the regional transport and telecommunications infrastructure to support day touring and drive trails. Invest in wayfinding and digital infrastructure to build intra-region connectivity.
12. Encourage the development of new and improved products and experiences to showcase the region’s natural attributes and increase the accessibility of natural areas including helicopter and marine tours, new island and hinterland accommodation.
Enablers of Success

1. **Partnership and collective buy-in** to stimulate the market and develop a compelling set of tourism experiences is a prerequisite if the 2020 vision is to be achieved. A strong alliance of public agencies is required to deliver growth. Collective ownership of strategic tourism objectives will enable delivery of a coordinated set of high-quality visitor experiences. Clear coordination among public sector agencies and destination managers will pave the way for productive partnerships with businesses and communities.

2. **Cooperative Marketing Investment Required to Drive Demand.** A significant element of the strategy needed to deliver the 2020 growth target is based on stimulating demand and being marketing-driven. We have a generational opportunity in terms of large-scale infrastructure and business investment, where accompanying cooperative marketing investment will unlock its full potential for the visitor economy. Commitment to significantly increased levels of co-operative marketing by partners across the region, businesses and councils, is a prerequisite if the region is to meet its 2020 economic goals for the visitor economy.

3. For the sector to deliver on its growth potential, it is recognised that **access to capital** will be required. Accessing capital, whether it is venture capital, private equity or institutional funds, can be challenging - and an existing shortfall of funds management expertise is an area that will need continued support. However, the proactive approach being taken to attracting investment in new quality hotel stock as identified in the Guide to Hotel Investment in Brisbane Australia 2014 demonstrates that tangible progress is already being made.

4. Leverage **Brisbane - Australia’s New World City** branding, and events such as the 2014 G20 Leaders Summit to challenge and change outdated perceptions of the region.

5. Utilise our existing strengths by better linking the region’s business travellers and business events with leisure experiences to increase yield and length of stay.

6. Support the work of Queensland Tourism Industry Council (QTIC) and Tourism Transport Forum (TTF) in **lobbying for workplace reform** to recognise that the tourism, retail and services industries are a seven day-a-week industry.

7. Ensure that local **planning schemes and state regulations** continue to enable and support new products and experiences.
City-focused and region-wide catalytic investment and action will be complemented by specific regional priorities.

**Figure 6: Regional Priorities and Themes**

- Clear brand, hero experiences, extended stay
- Digital
- Events

- Food destination
- Food education through the establishment of National Food Training & Innovation Centre
- Capitalise on international student cohort at UQ Gatton

- Sport/ cultural facilities and infrastructure including expansion/ development of the North Ipswich Railyards Precinct & Motorsport Precinct
- Event attraction & development

- Events
- Infrastructure and accessibility/ connectivity
- Precinct development/ marketing
- Leverage natural assets – Parks and Conservation Areas

- Nature-based activities/recreation precinct
- Adventure

- Sustainability
- Cultural development/interpretation
- Capitalise on natural assets/nature-based activities
- Events
- Food destination/value added

- Global village – culture/food
- Nature-based activities/recreation precinct

- Natural assets
- Cultural tourism
- Activate public spaces
- Year-round destination
- Extend length of stay and spend
Summary of Key Markets, Growth Strategies & Supporting Development

**Domestic Leisure**

*Growth Strategy*
- Focused on extending average length of stay (and spend per night)
- Targeting growth in interstate visitor volumes.

*Catalytic Actions and Investment*
- Support investment in major infrastructure projects
- Experience development across the region;
- Precinct development
- Connectivity and access
- Extension of Give me Brisbane Any Day messaging into local, VFR, interstate and event promotion to lift preference and visitation to the region.

Growing average visitor length of stay by 0.35 days will contribute $620m per annum.

**International Leisure**

*Growth Strategy*
- Focused on establishing a clear brand proposition to grow visitor volumes – particularly Asian markets
- Securing average length of stay/value growth in existing markets.

*Catalytic Actions and Investment*
- Utilising the 2014 G20 Leaders Summit as a springboard
- Airport and route development
- Establishing a clear brand proposition in international markets
- Targeted international promotion, leveraging existing investments by the airport, local government, TEQ and Tourism Australia to increase the average length of stay of identified international markets
- Precinct development/24 hour city investment;
- Connectivity and access
- Event/attraction leveraging
- Leveraging Brisbane’s Queensland gateway role, including the 2018 Commonwealth Games.

Seek growth in international air arrivals by 5.4% per annum.

**Events**

*Growth Strategy*
- Application of strategies which seek to increase the scale and frequency of events; while ensuring events are an enabler for key regional development priorities
- Improved leveraging of Brisbane’s current events portfolio
- Development of existing and arising major events
- Procurement and acquisition of new events
- Leveraging regional authenticity and strengths to grow unique events.

*Catalytic Actions and Investment*
- Grow and attract significant leisure events to create a more compelling, year-round events calendar
- Focus on leveraging, development and procurement of current and future events
- Event activity which cuts across and enables demand drivers within the Brisbane economy (the 2014 G20 Leaders Summit, Brisbane Greeters, investment, digital, retail, export, business and city liveability - while being a key driver for tourism)
- Activation of current and future supply (new and existing infrastructure - refer page 48; products; services; and geographic development)
- Regional event development.

Growing leisure events visitors by 1.5 percent will generate an additional $128m.

**Business Events**

*Growth Strategy*
- Leveraging forecast economic growth
- Targeting substantial growth from business events in key markets and sectors
- Growth in average length of stay and spend (pre/post trip extensions).

*Catalytic Actions and Investment*
- More actively promote the destination for business events and leveraging the positive attributes of the city and its lifestyle
- Precinct development/24 hour precincts
- Connectivity Plan – air and public transport, and digitally
• Better link the region’s business travellers and business events with leisure experiences to increase yield and length of stay
• Invest in industry education and participation to further grow mid-week visitation
• Leverage commercial investment in key precincts to encourage further participation in new experiences.

**Growing business visitors by 1.5 percent per annum will generate an additional $294m.**

**Visiting Friends and Relatives**

*Growth Strategy*
- Growth in average length of stay and spend
- Leveraging population growth to grow volumes.

*Catayltic Actions and Investment*
- Experience development across the region
- Precinct development
- Connectivity and access
- Extension of Give me Brisbane Any Day messaging into local, VFR, interstate and event promotion to lift preference and visitation to the region
- Continued development for Brisbane Greeters and Brisbane Welcomes the World programs.

**Grow VFR visitors by 1.5 percent per annum will generate an additional $387m.**

**Cruise Market**

*Growth Strategy*
- Focused on growth in volume and market share

*Catayltic Actions and Investment*
- Support development of a new cruise terminal on the bay side of the Gateway Bridge
- Airport and route development in relation to fly/cruise sector
- Connectivity between port, city and visitors’ precincts, allied with development of options for pre and post-cruise itineraries
- Attracting investment in new products and experiences to create compelling local itineraries
- Experience development across the region
- Precinct development/24 hour city.

**International Students**

*Growth Strategy*
- Growth in volume of enrolments/student days spent in Brisbane
- Increased spend, generated directly and via VFR.

*Catayltic Projects and Investment*
- Increase investment by partners in promoting the region as an ideal location for international students through targeted marketing program
- Collaborative marketing with Study Brisbane to maximise VFR expenditure and raise awareness of visitor experiences among the student population
- Experience development across the region
- Precinct development
- Connectivity and access.

**Growing international education visitors by 0.5 percent per annum will generate an additional $139m.**
Glossary

Brisbane City Centre Master Plan 2014
Brisbane Economic Development Plan 2012 – 2031
Brisbane Event Strategy 2014 to 2020
Business Events Sector Progress Report 2020, Business Event Australia
Creative Brisbane, Creative Economy 2013 – 2022
CSIRO Global Trends
Digital Disruption: Short Fuse Big Bang (2012)
Harnessing The Bang – 2014 (DD Follow up Layout FINAL 1706)
Hotel Investment in Brisbane Australia 2014
Positioning for Prosperity (MGI big Data full report.pdf)
Queensland Tourism Strategy (20 year)
River’s Edge Strategy

Local Government Tourism and Event Plans & Strategies

- Scenic Rim Regional Tourism Strategy 2011-2016
- Tourism Strategy for the Redlands 2014
- Ipswich Tourism Strategy 2012-2016
- Lockyer Valley Tourism Destination Plan 2013
- Logan City Tourism Strategy 2013
- Moreton Bay Region Tourism Destination Management Plan 2009
- Somerset Region Destination Management Plan, 2014