

DISCUSSION PAPER FOR CONSULTATION WORKSHOPS¹

1. Background overview

In December 2009 the Australian Government launched the National Long-Term Tourism Strategy and set a minimum goal of doubling the value of tourism by 2020. Having recognised tourism as one of the four pillars of the economy, the Queensland Government has likewise taken on this challenge of growing tourism and is committed to making Queensland the nation's number one tourism destination, with a target of doubling annual overnight visitor expenditure to \$30 billion by 2020. Achieving this goal will require a strong commitment between industry and all levels of government to work in partnership – a vision that is clearly embodied in the *DestinationQ Partnership Agreement*.

The new 20 Year Queensland Plan, *Destination Success*, and the first *Action Plan* (January 2014 – June 2015) outline the target and the strategic directions, and provide the context for the Southern Queensland Country Destination Tourism Plan planning process.

At the same time, this process will seek to build on planning initiatives that have already occurred at the regional level. Developing the Destination Tourism Plan offers an opportunity to complement existing corporate, economic development and tourism strategies, explore further options for moving forward with previously identified opportunities, and reflect the underlying community aspirations.

2. Our 2020 challenge

Tourism today generates \$734 million of direct visitor spending, with overnight visitors to the Southern Queensland Country Region contributing a total of \$1.25 billion of direct and indirect expenditure to the local economy. This in turn supports 21,907 full-time equivalent jobs. Taking on the Government's challenge of doubling tourism by 2020 creates a target of \$1 billion in overnight visitor expenditure for Southern Queensland Country Region.

Table 1: Southern Queensland Country – 2020 Target Market Share Estimates: Summary

Market Segment	Number of overnight visitors 2013	2013 Expenditure	Share of 2013 Expenditure	2020 Additional Target Numbers	2020 Target Expenditure	Share of 2020 Expenditure
Domestic Intrastate	1,471,000			+ 288,000		53%
Domestic Interstate	359,000			+ 70,000		24%
Total domestic	1,830,000	\$669.3 m	91.1%	+ 358,000	\$800 m	78%
International	48,000	\$65 m	8.9%	+ 18,000	\$230 m	22%
TOTAL		\$734.3 m	100%	+376,000	\$1 billion	100%

QUEENSLAND 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.

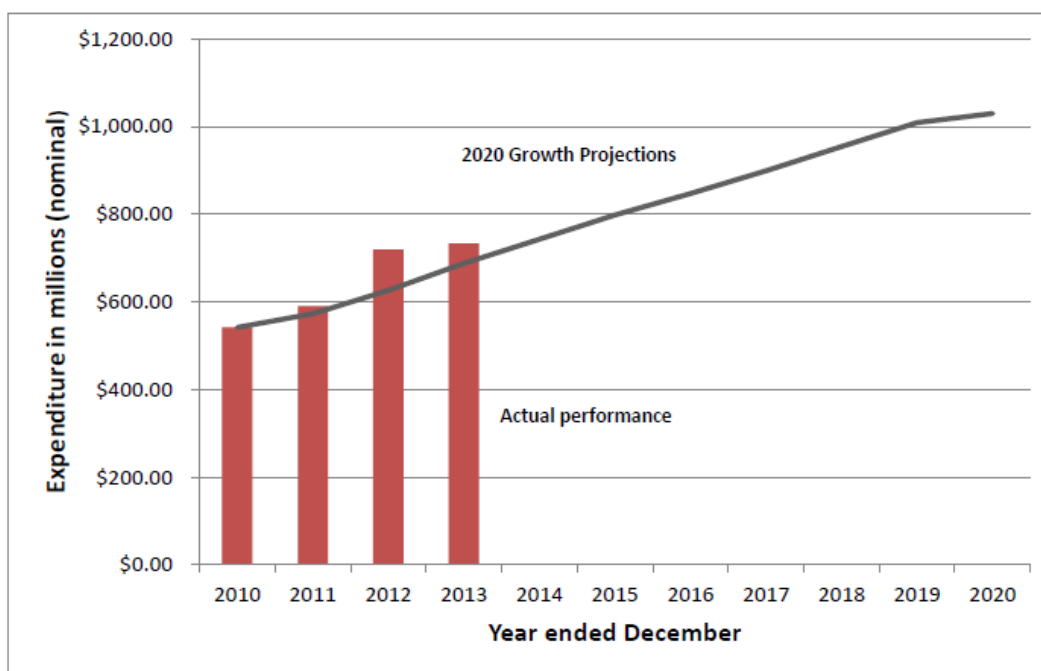
The tourism industry will be strong and prosperous, fully engaged with governments and the community, and universally recognised as fundamental to Queensland's economic, environmental and social future.

Destination Success: The 20-Year Plan for Queensland Tourism, December 2013

¹ This paper presents a summary of the *Southern Queensland Country Destination Tourism Plan – Discussion Paper*. The full paper is available through contacting SQCT at enquiries@sqct.com.au or on 1800688949.

Table 1 presents the 2020 challenge – one of growing overnight visitor expenditure to \$1 billion through increasing the overall number of visitors, with a particular emphasis on increasing the level of expenditure from international visitors. While performance within the Region has been encouraging, with actual performance tracking above the 2020 growth targets as shown in Figure 1, the challenge still remains one that will need careful consideration if the industry is to remain on target. The Consultation Workshops offer you the opportunity to identify and discuss options for sustainable growth.

Figure 1: Southern Queensland Country Annual Overnight Visitor Expenditure - Actual Performance and 2020 Growth Targets



3. Our vision for the region

By 2020 Southern Queensland Country will be recognised as Queensland’s premier country getaway destination known for its distinct seasons and regional flavours; where you can breathe deep and enjoy a taste of life in the country, Southern Queensland Country Tourism.

The region’s competitive strengths underlie the ‘hero experiences’ that were developed in 2012.

Competitive Strengths	Hero Experiences	
<ul style="list-style-type: none"> • Home to award winning wines and artisan products • Pristine national parks and spectacular natural attractions • Diversity of experiences across the Region offering visitors an authentic holiday • Historical heritage providing a snapshot into what country life was like • Friendly people and country lifestyle • Relaxed and peaceful atmosphere • Four distinct seasons provide a diverse range of experiences 	<ul style="list-style-type: none"> • Natural beauty • History and heritage • Four seasons • Authentic country life – like a local • Authentic country life – regional flavours 	
	Core Brand Promise	
	<i>Slow down, breathe deep and enjoy a taste of life in the country</i>	

4. Our markets

SOUTHERN QUEENSLAND COUNTRY TARGET MARKETS

Tier One

- Connectors in Regional Queensland and Brisbane (250km radius of the Southern Queensland Country Region)
- Social Fun-seekers in Brisbane and Regional Queensland

Tier Two

- Social Fun-seekers in Sydney and Melbourne
- UK, North America, Europe and Scandinavia
- Connectors in Sydney and Melbourne

Tier Three

- Korea, Malaysia and New Zealand

New and Developing

- China, Taiwan and Hong Kong

Connectors – Connectors see holidays a chance to connect with people they care most about. They will often subordinate their own preferences in terms of activities to ensure everyone has a good time.

Social Fun-seekers – For this market, the essence of a holiday is having a fun time. While they do a lot of different activities, it is sharing the experience with friends and other holiday makers that make the difference.

Tourism Australia has defined its international target market as **‘Experience Seekers’** who are globe trotters looking for authentic interactions, brag-able locations, and the opportunity to get off the beaten track and immerse themselves in local culture. These travellers are Australia’s highest yielding international market and are more likely to increase their length of stay and average spend in comparison to others.

Looking at the domestic market, market segmentation research undertaken by Tourism and Events Queensland has demonstrated that the **Connectors** and **Social Fun-Seekers** are the key target segments most likely to respond to the type of experience associated with Southern Queensland Country. Clearly building on the region’s strengths and creating ‘hero experiences’ that resonate with these markets will be key to growth in the future.

5. Consumer and community perceptions

Recent research on consumer and community perceptions demonstrate that awareness of the region and local residents’ perception of tourism both suggest a solid basis for strengthening the tourism economy. Tourism and Events Queensland’s Brand Equity Index provides a means of measuring consumer perceptions of the State’s visitor destinations. The 2013 research has indicated that the new Southern Queensland Country brand has achieved initial traction in the Queensland marketplace, and that there is a 73% awareness of Southern Queensland Country as a destination, with over half the respondents indicating that they would consider visiting the region.

When the social impact of tourism in the region was examined, residents’ responses show that tourism is perceived more favourably within the region than the average rating for Queensland as a whole, and that the attitude towards visitors is more positive than the state average.

6. The way forward

Moving toward the goal of doubling overnight visitor expenditure and increasing the value of tourism to the regional economy will require careful planning to ensure that tourism develops in an appropriate manner, and that the industry is well positioned to take advantage of emerging opportunities and respond to challenges. Recent research has identified seven megatrends that will impact the tourism sector in Queensland – all of which need to be taken into consideration when planning for 2020. These trends include:

- **The Orient Express** – the shift of the world economy from west to east.
- **A Natural Advantage** – in a world where ecological habitats are disappearing the unique natural assets of Queensland will become a stronger draw-card.
- **Great Expectations** – travellers’ increasing expectations for authentic and personalised experiences often involving social interaction.
- **Bolts from the Blue** – sudden and hard to predict events such as extreme weather and infectious disease outbreaks, combined with safety concerns, will have increased impact on travel.
- **Digital Whispers** – people are changing the way they access and trust information in an online world.
- **On the Move** – people are becoming increasingly mobile, and are travelling further and more frequently for many reasons including leisure, business, events, education and healthcare.
- **The Lucky Country** – Queensland and Australia have fared relatively well through recent global financial turbulence, but are increasingly regarded as expensive destinations.

Looking to the future, attention will need to focus on assessing infrastructural needs and support services; reviewing access issues and opportunities related to road and air access; developing and delivering immersive experiences, including new events, that are characterised by quality and authenticity; ensuring that regional planning policies supports the conservation of the environment and the enhancement of the public realm; and, developing a trained workforce to meet anticipated forecasts of visitors.

7. Your contribution to the process

We value your input in this planning process and would like you to consider the following questions in preparation for the workshop discussions.

- **What are the current constraints facing you** and the region overall as we seek to grow tourism dollars and increase the profitability of our businesses?
- Looking at the tourism industry in general and thinking of your own business or organization, **what should we be focusing on in the short and longer term to strengthen the tourism industry, achieve a significant level of growth, and realise the Southern Queensland Country vision for 2020?**
- **What actions need to be taken for what you have in mind?**
- Thinking about the **HERO EXPERIENCES** that have been identified for Southern Queensland Country, **what are the key opportunities related to developing these types of experiences in the region?**
- Please see if you can identify three **distinctive** visitor experiences under each theme.

Southern Queensland Country Vision

By 2020 Southern Queensland Country will be recognised as Queensland’s premier country getaway destination known for its distinct seasons and regional flavours; where you can breathe deep and enjoy a taste of life in the country

HERO EXPERIENCES or Key Regional Themes FOR Southern Queensland Country

Natural beauty
History and heritage
Authentic country lifestyle and Regional Flavours
Four seasons

THANK YOU for taking the time to consider these topics. We are looking forward to a dynamic, interactive and thought-provoking workshop.