



QUEENSLAND
TOURISM INDUSTRY
COUNCIL

The Voice of Tourism

**STATEMENT OF
SUPPORT
for the diversification
and growth of the
tourism industry on
North Stradbroke
Island**

Queensland Tourism Industry Council

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STATEMENT OF SUPPORT

To deliver the Government's objective to phase out sand mining on North Stradbroke Island by 2019, the Queensland Government has developed a Draft North Stradbroke Island Economic Transition Strategy (NSI ETS) to support the transition of the economy away from mining. The NSI ETS is focused on diversification and growth in the tourism industry on the island including the development of nature, adventure, and cultural based tourism.

The Queensland Tourism Industry Council (QTIC) offers its support in the transition from sand mining to a more tourism focused economy, and for the diversification and growth of the tourism industry on North Stradbroke Island.

Queensland Tourism Industry Council

QTIC is the state peak body for tourism in Queensland. As the voice of tourism, QTIC represents the interests of the tourism industry, including business operators, Regional Tourism Organisations (RTOs) and sector associations.

QTIC is a private sector, membership-based tourism industry organisation; all of Queensland's 13 RTOs are members of QTIC as are 20 of the industry sector associations and in excess of 3,000 regional members, operating in all sectors of the tourism industry. QTIC works in partnership with government agencies and industry bodies at a local, state and national level (National Tourism Alliance), to strengthen the voice of tourism in all relevant policy forums.

Tourism in Queensland

Tourism is a key economic driver in many Queensland regions, supporting regional employment and community growth, employing over 230,000 people directly and indirectly, or 9.9% of all people employed in Queensland.¹ This is substantially more than the mining sector (79,000 direct jobs) or even agriculture, forestry and fishing combined (56,900 direct jobs)².

The tourism industry in Queensland contributed \$23 billion to Queensland's Gross State Product (GSP), representing 7.9% of total GSP and generated \$5.8 billion in exports in the year ending June 2014, making it the state's second largest export earner behind coal². In the year ending June 2015, visitor expenditure in Queensland was \$18.3 billion; \$49 million daily spend in the local economy. The return on tourism is high, with every dollar tourism earns adding an additional 87 cents to other parts of the economy³.

The Queensland Tourism Industry Outlook Potential to 2020 sets the state industry target of \$30 billion in visitor expenditure by 2020. The growth of the tourism sector and visitor expenditure in South East Queensland will be a large contributor in achieving this state industry potential.

Tourism is forecasted to be a major contributor to Queensland's economic growth. In the recently released report by Deloitte⁴ titled *Positioning for prosperity? Catching the next wave*, global growth

¹ Tourism Research Australia, State Tourism Satellite Accounts 2013-14, released April 2015.

² Tourism Queensland, Tourism Economic Key Facts, September 2015.

³ Tourism Australia, 2014.

⁴ Deloitte, Positioning for Prosperity?: Catching the next wave. 2014.

trends and Australia’s areas of advantage were examined. Results showed that our next waves of prosperity are likely to come from five sectors: tourism, gas, agribusiness, international education and wealth management. The report states:

...“there is a lot more potential growth in the pipeline [for Australia], with tourism projected to be among the world’s fastest growing industries. Our forecasts have it growing 4% a year from now to 2033 – that is, more than doubling in size over the next two decades. Even better, many of those new travellers will depart from Asia”.

The March 2016 Queensland Business Outlook from Deloitte forecasted international tourist arrivals to Queensland to grow at a rate of approximately 5.7% per year over a five year forecast period; expected also to improve is retail spending, with a surge in high spending Chinese arrivals.⁵

Tourism in South East Queensland

In the year ending June 2015, the Brisbane region hosted 40.37 million visitor nights, a daily average of 17,800 visitors, with a daily spend of \$14.28 million or \$5.2 billion visitor spend annually. A key economic driver in Brisbane, tourism supports 65,000 jobs (directly and indirectly) and accounts for 26.5 percent of all tourism jobs in Queensland⁶. In the same period, the Gold Coast region hosted 21.8 million visitor nights, with a daily spend of \$10.7 million or \$3.9 billion visitor spend annual. Tourism supports 54,400 local jobs (directly and indirectly) and accounts for 18.3% of the jobs in the Gold Coast region.

There has recently been significant investment in tourism infrastructure and new product in South East Queensland, particularly in accommodation product such as the Queen’s Wharf Brisbane Precinct, and airport infrastructure including Brisbane and Gold Coast Airports. However ongoing investment infrastructure and supporting innovative new business and unique tourism developments is required to maximise the competitiveness of South East Queensland.

Tourism Research Australia data shows that visitors to the South East Queensland region (including Brisbane, Sunshine Coast, Gold Coast and Darling Downs regions) have a strong interest in nature-based, adventure and cultural activities, particularly the international leisure market, shown in the tables below. The data also suggests however that there are some gaps in these types of tourism product in South East Queensland compared to total Queensland, and therefore potential for North Stradbroke Island to add to the range of experiences available.

Table 1: Nature-Based Visitor Activities in South East Queensland/Queensland

	Domestic Overnight Trips (all purpose trips)		International Trips	
	SEQ	Qld	SEQ	Qld
Go to the beach	30.2%	30.2%	79.6%	79.7%
Visit botanical or other public gardens	4.5%	4.2%	56.2%	54.3%
Visit national parks / state parks	8.3%	9.5%	54.7%	56.3%
Visit wildlife parks / zoos / aquariums	1.8%	2.3%	44.6%	46.1%
Go whale or dolphin watching	0.5%	0.7%	12.7%	11.9%
Other outdoor activities	2.7%	3.0%	11.6%	11.9%

Source: Tourism Research Australia, National and International Visitor Survey, year ending December 2015.

⁵ Deloitte, Queensland Business Outlook Report, March 2016.

⁶ Tourism and Events Queensland, Economic Key Facts to September 2015.

Table2: Adventure Visitor Activities in South East Queensland/Queensland

	Domestic Overnight Trips (all purpose trips)		International Trips	
	SEQ	Qld	SEQ	Qld
Charter boat / cruise / ferry	2.1%	2.8%	31.8%	34.7%
Bushwalking / rainforest walks	8.9%	11.0%	31.7%	34.8%
Surfing	2.4%	1.9%	9.3%	8.3%
Scuba diving	0.1%	0.4%	8.9%	11.1%
Snorkelling	0.5%	2.0%	16.6%	23.3%
Cycling	1.2%	1.3%	5.4%	5.3%

Source: Tourism Research Australia, National and International Visitor Survey, year ending December 2015.

Table3: Cultural Visitor Activities in South East Queensland/Queensland

	Domestic Overnight Trips (all purpose trips)		International Trips	
	SEQ	Qld	SEQ	Qld
Attend festivals / fairs or cultural events	2.6%	2.6%	12.6%	12.5%
Attend theatre, concerts or other performing arts	3.2%	2.6%	11.5%	11.6%
Visit museums or art galleries	4.2%	4.6%	36.3%	35.2%
Visit history / heritage buildings, sites or monuments	1.9%	2.6%	35.5%	35.5%
Go on guided tours or excursions	0.8%	1.4%	19.6%	24.6%
Visit art / craft workshops / studios	0.3%	0.3%	8.9%	8.9%
Experience aboriginal art / craft and cultural displays	0.1%	0.3%	8.6%	10.9%

Source: Tourism Research Australia, National and International Visitor Survey, year ending December 2015.

Development of the Tourism Economy on North Stradbroke Island

QTIC remains committed to working with the Queensland Government and industry to achieve industry development outcomes through the state tourism strategy, *Destination Success*, the 20-year tourism plan of the Queensland Government for tourism. *Destination Success* prioritises six key themes that will grow the tourism industry:

- ***Build strong partnerships***
Development of the tourism economy on North Stradbroke Island will require a coordinated approach from community, local councils, and state and federal governments to achieve a sustainable approach to tourism.
- ***Preserve our nature and culture***
Facilitating the development of sustainable tourism. Tourism is an obvious partner in achieving environmental conservation outcomes on North Stradbroke Island, with shared goals in protecting our marine and terrestrial natural assets. Tourism has a vested interest to preserve and protect not only the natural assets and cultural heritage of our state, but support for Aboriginal and Torres Strait Islander people through tourism activities.
- ***Deliver quality, great service and innovation***
Business support, education and industry training will support the development of high quality tourism experiences on North Stradbroke Island. Every part of the tourism industry

must cater to evolving consumer needs, desires and expectations and find ways to innovate, improve and invest in business, product and people. Strengthening partnerships between industry and the education and training sector is needed to ensure training and skills programs are world class and contemporary.

➤ ***Target a balanced portfolio of markets***

North Stradbroke Island has tremendous potential to preserve and grow the value of the domestic visitor market and drive repeat visitation, and also meet the demands of international visitor markets, including the growing Chinese market, seeking a premier nature-based destination close to major cities and transport hubs.

➤ ***Offer iconic experiences***

North Stradbroke Island has potential to offer unique and highly sought after visitor experiences. There exists a gap in some categories of nature-based, adventure and cultural tourism product in South East Queensland, particularly Indigenous tourism experiences. North Stradbroke Island is positioned well to develop such iconic experiences and add to the range of experiences available in South East Queensland.

➤ ***Grow investment and access***

Investment in public infrastructure and facilitating private investment in tourism development. Efficient access infrastructure to regions has a direct and often immediate impact on visitation numbers and consumer demand. Attracting private tourism investment relies heavily on government policies, and business laws and regulation to provide conditions that stimulate private sector investment in new developments and re-investment in existing product.

FURTHER ENQUIRIES

We welcome any feedback relating to this statement of support. For all enquiries, please contact QTIC Policy Team on