

Submission to Destination 2045 Strategy – the future of tourism



**QUEENSLAND
TOURISM INDUSTRY
COUNCIL**

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Destination 2045: Queensland's Tourism Future

1. STATE OF THE INDUSTRY

Queensland's tourism industry is growing but losing ground. Queensland's market share has declined, costing the state over \$11 billion in lost visitor expenditure since 2010. Despite record funding for tourism, the return on investment has weakened.

The Destination 2045 Strategy is a crucial opportunity for decisive government action to restore Queensland's competitive edge. QTIC calls for a clear, accountable performance framework—tracking visitor growth, economic impact, sustainability, events, infrastructure, and workforce development.

A strategic funding boost is essential, including meaningful dialogue about the feasibility of a visitor levy, and investment in new tourism products. Climate resilience must also be prioritised, with disaster preparedness and insurance reform key to long-term sustainability.

To secure Queensland's tourism future, government, industry, and local stakeholders must align behind bold, measurable actions, ensuring the state remains a world-class destination.

Queensland's tourism industry has seen record growth, yet its competitive edge has slipped, losing market share to other states.

In 2010, Queensland held 23.1% of Australia's total visitors, dropping to 22.0% by 2023. Once a tourism powerhouse, the state must act now to reclaim its position. The Destination 2045 Strategy is a critical opportunity for bold government action to reverse this trend, drive growth, and position Queensland as a globally competitive, authentic, and transformative destination.

Queensland's visitor numbers have grown (15.5% total, 11.2% holiday), but the state is falling behind. Victoria surged by 28.7%, NSW by 18.4%, and even the ACT outpaced Queensland at 23.3%. Holiday visitation tells the same story, NSW (18.4%) and Victoria (38.9%) are pulling ahead.

The real cost? Over \$11 billion in lost visitor expenditure by failing to maintain our 2010 market share. Without decisive action, Queensland risks being left behind. (Source TRA)

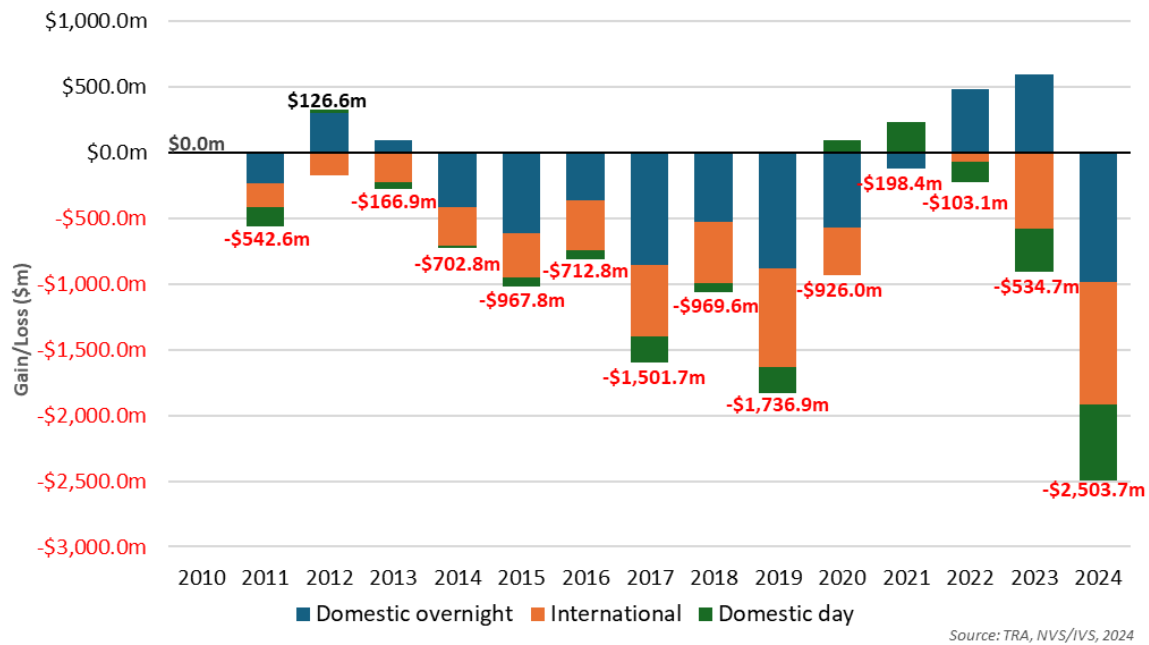


Figure 1- Queensland share of national holiday visitor expenditure, annual value of gain or loss (from 2010 baseline)

When examining the employment statistics over FY07-19, a similar story is evident. Queensland has performed well, yet it is lagging other states:

- Average direct job growth annually between FY07-19 was 1.3% per annum (totalling 14.9%) – this is less than one quarter of Victoria’s job growth over the same period.

Net taxes generated by tourism grew by 49.4% (FY07-19), however leaving Queensland ranked seventh with only the Northern Territory recording lower growth.

- Overnight Visitor Expenditure (OVE) failed to grow at the same rate as other states, with four of the other states recording Holiday OVE at a rate of three times that of Queensland.

(Source TRA)

The driver underpinning the economic impact of tourism, is visitor expenditure. Within the overall visitor economy, the key indicator used by most states is OVE which is overall expenditure excluding daytrip expenditure. Total OVE is broken down further by purpose to Holiday OVE, Visiting Friends and Relatives (VFR) OVE, Business OVE and Other OVE. This breakdown is important to understand the clear distinction in expenditure patterns that can occur between Holiday OVE (with discretionary destinations) and VFR OVE, Business OVE etc (mostly non-discretionary destinations), which can create misleading interpretations of results when just ‘Total OVE’ is used as a critical performance measure.

The final analysis considers the comparison between the combined funding of regional and state tourism entities, in Queensland, and the desired outcome of increased Holiday OVE. The result was

that funding for tourism in Queensland doubled FY10-FY24 to more than \$220 million per year, while Funding Yield (OVE/Funding) has declined. In FY10, there was \$88.18 in holiday visitor expenditure for every funding dollar (\$102.7m) compared to FY24 with \$76.47 returned for every funding dollar (\$227.6m).

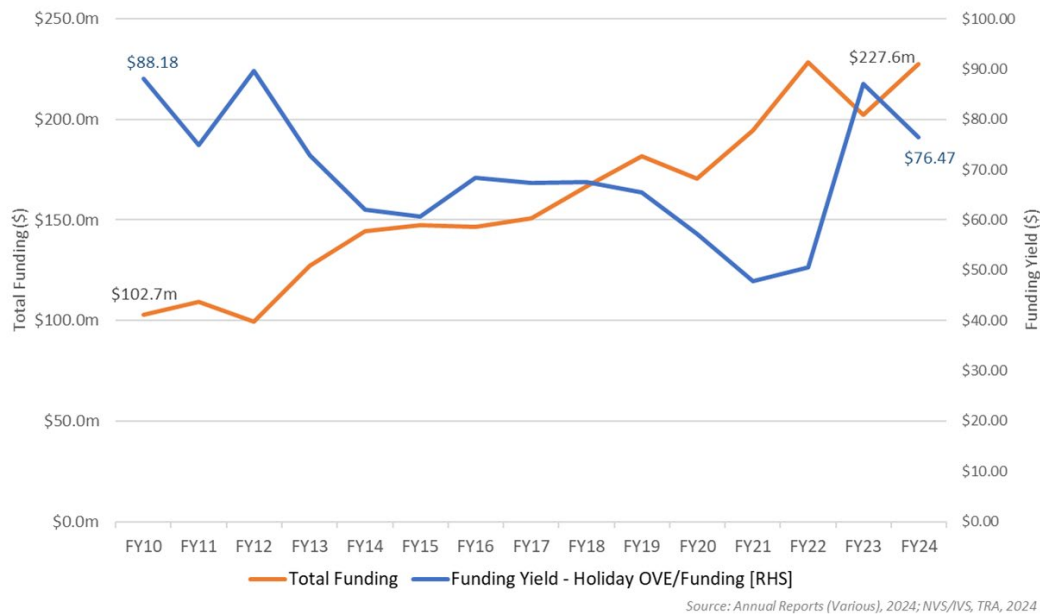


Figure 2 - TEQ & RTO total funding comparison with Holiday OVE, funding yield (Holiday OVE/total funding)

Tourism in Queensland has benefited from the overall boom in tourism over the past 20 years. However, the rising tide floated all boats and highlights the importance of Queensland pursuing a more competitive approach and tracking total market share of Australia.

Taking the above information into consideration, QTIC calls for a macro review of Queensland's performance, and the establishment of a revised 'first principles' notion where the reporting of the performance of the Queensland tourism industry against the strategy is fulsome and includes both macro and micro performance indicators.

The government need to identify the targets it is setting itself at the macro level and should have targets that ensures long-term sustainability, competitiveness, and economic impact for Queensland's tourism industry. Factors such as red tape reduction, streamlining process, enabling ecotourism products and tangible investment attraction activities are impacts that require a performance indicator framework.

While macro targets focus on long-term industry-wide goals, micro targets are specific, measurable objectives that directly contribute to overall tourism growth. These targets can be implemented at business, regional, and operational levels to drive tangible outcomes and include the more traditional performance indicators of OVE.

QTIC asks that the government commit to developing a clear, comprehensive and transparent report card that includes measuring the success of both macro and micro-outcomes for each of the below:

- Visitor growth & market share (nationally)
- Visitor growth & market share (internationally)
- Economic Contribution & Industry Growth
- Destination & Infrastructure Development
- Sustainability & Environmental Leadership
- Ecotourism
- Events
- Workforce
- Industry development
- Infrastructure and investment
- Experience Development
- Transport and connectivity.

QTIC also asks that the government approach the implementation of the Destination 2045 strategy with an integrated strategic approach. By that, we ask that the state government work with local governments, First Nations, DMOs and QTIC to develop aligned and agreed destination management plans that actively feed up into agreed targets.

Support from local government will be of utmost importance in the smooth delivery of new investment and infrastructure, transport, marketing, events and ecotourism. If all parties are not aligned with the Destination 2045 vision for their region, we have not removed initial impediments to growth and achieving goals.

The Destination 2045 Scorecard should be publicly reported on, half yearly.

Sustained investment in tourism is essential over the next seven years to drive infrastructure, capability development, and disaster resilience. Funding must be frontloaded to ensure Queensland is well-prepared for the 2032 Olympic and Paralympic Games while laying a strong foundation for long-term growth.

To enhance funding for the sector, the government should consider:

- Empowering local governments with a visitor levy option – A well-structured visitor levy could provide a dedicated revenue stream for tourism infrastructure, destination marketing, and industry development. Global destinations like New Zealand and parts of Europe successfully reinvest levy funds to enhance visitor experiences, improve public amenities, and support conservation. A clear framework must be established to ensure all funds are reinvested into tourism rather than absorbed into general revenue.
- Benchmarking Queensland's tourism investment, to remain competitive, the government should conduct a comparative analysis of tourism funding across states, assessing the balance between marketing and product development. While marketing attracts visitors,

sustained growth depends on developing tourism infrastructure, experiences, and regional offerings.

- Expanding dollar-for-dollar infrastructure grants, programs like the Outback Tourism Fund and the Growing Tourism Fund have proven the effectiveness of co-investment models in accelerating new product development. Increasing these initiatives would further leverage private sector investment to drive industry growth.

A collaborative approach between the government, QTIC, and destination marketing organisations (DMOs) is critical to achieving meaningful outcomes for the industry. In order to support this delivery, the structure of the industry needs to be reviewed and adequately funded. This includes ensuring that roles and responsibilities are well defined to reduce duplication and to provide surety to industry that outcomes will be delivered in a meaningful way. This includes providing dedicated industry development funds and supporting workforce development.

QTIC urges the government to gain bipartisan support on the final document to ensure longevity to deliver on the outcomes of the strategy. If we are serious about affecting change and growth, the 20-year strategy must be just that, and not subject to starting again in 4- or 8-years' time.

Insurance access and affordability is an issue for business for the Queensland visitor economy and should be highlighted as part of the Destination 2045 strategy. The insurance requirements to operate a business in Queensland are complex with many different policies required by businesses including:

- Injury protection: public liability insurance, compulsory third-party insurance, income protection insurance, workers compensation insurance, life insurance, health insurance (business owner).
- Business protection: professional indemnity insurance, management liability insurance, business continuity insurance
- Asset protection: property insurance, cyber insurance

Insurance may be purchased from an authorised general insurance business regulated by the Australian Prudential Regulatory Authority (APRA). If insurance is too expensive or unavailable, operators may choose to purchase insurance from an unregulated offshore insurance provider, cease production of businesses, or hold risk (operate without insurance).

In their 2020-23 Annual Report, APRA (2023) state the “affordability and availability of insurance cover for parts of the Australian community is deteriorating. This challenge is exacerbated by the increasing frequency and impact of severe weather-related events, inflationary pressures, and a general hardening of the market across retail and commercial lines.”

While property insurance remains a challenge with frequency and extremity of weather events, public liability insurance availability and affordability needs attention to underpin the delivery of experiences by the visitor economy. Sectors in the visitor economy impacted by insurance affordability and availability issues include caravan parks, marine, venues, events, attractions, mobile amusement devices adventure tourism and agritourism.

The rising cost of insurance threatens tourism businesses, particularly north of the Capricorn line, where operators struggle with accessibility and affordability. Without intervention, increasing premiums and reduced payouts will make operating unsustainable for many.

Insurance access and affordability should be Included in Destination 2045: Queensland's Tourism Future so that the industry and Queensland government champion insurance availability and affordability across government and industry to underpin the development and production of visitor infrastructure, events and experiences in Queensland.

Actions that contain the cost of (1) premiums and (2) claims will together bring down the cost of insurance. Actions to contain the cost of premiums for inclusion in the Destination 2045 strategy include:

- State government to advocate for federal legislation for insurance brokers to disclose their commissions and other payments they receive as recommended by the Hayne Royal Commission into misconduct in the banking, superannuation and financial services industry (Royal Commission, 2019)
- State government to advocate for the expansion of the Australian Reinsurance Pool to be extended to cover flood damage across the state and marine tourism in the North. The recent cyclones and floods in northern Queensland have exposed the limits of the reinsurance pool and expansion to cover flood would limit the risk for private insurers making the market more attractive for commercial insurance.
- State government to review of the state taxes and levies on insurance to address reduction or removal of these including state imposed takes on general insurance.
- Support collaboration between the insurance industry and the visitor economy for the development of innovative products including Group Insurance Programs, Discretionary Mutual Funds and for public liability insurance co-insurance and underwriting consortia.

Actions that could assist in containing the cost of claims include:

- Facilitate collaboration between insurance providers, industry associations and operators for the development and implementation of risk management education, standards and accreditation.
- Make Queensland the best place to run a tourism business by championing state-level tort law reforms including:
 - Statutory caps on personal injury to limit public liability claims. Statutory caps on public liability will provide ongoing confidence to operators that they will be able to find and be covered by adequate policy.
 - Removal of “no win, no fee” litigation in Queensland to remove cost out of the tort and insurance claims systems.
- Consider adopting a similar scheme as to the New Zealand Accident Compensation Corporation (ACC) where Workers Compensation and injury cover is extended to all residents of, and visitors to, New Zealand. Everyone is covered by ACC's no-fault scheme, paying for the costs of hospital treatment, help at home and at work, and the costs of any potential income loss. ACC is funded primarily by income from its investments, funding from the government, and from levies collected from everyone who works and owns a business in New Zealand.

Additionally, climate risk poses a major threat to Queensland's tourism assets. A report by Zurich and Mandala identifies all Queensland airports at high or very high risk, with extreme weather events—particularly wind, rain, and storms—posing the greatest challenge. A statewide resilience strategy must:

- Factor climate risk into infrastructure planning, ensuring that post-disaster rebuilding efforts follow a "build back better" mandate.
- Support businesses in adapting to insurance challenges, potentially through industry-wide solutions or incentives.
- Prioritise regional adaptation strategies to mitigate future climate impacts.

The Destination 2045 strategy must embed resilience at its core to ensure Queensland's tourism industry is future proofed against growing environmental and financial pressures.

2. GAMES LEGACY

The 2032 Olympic and Paralympic Games present an unparalleled opportunity for Queensland's tourism industry to shine on a global stage. QTIC advocates for a governance framework that integrates the tourism industry's voice and its goals as part of the planning and delivery of the Games. It is vital that the benefits of the 2032 Games is dispersed across Queensland, not just in the SEQ corner, requiring a conscious effort and targeted investment strategy for the 2032 Games Legacy.

Recommendations:

1. Tourism Integration in Games Planning

- Integrate a resolute tourism advisory sub-committee within the Brisbane 2032 governance framework. Include representatives from QTIC, RTOs, industry leaders, and First Nations tourism leaders to provide sector-specific insights.
- Mandate regular consultations between the Games Independent Infrastructure and Coordination Authority (GIICA), the Brisbane Organising Committee, and the tourism sector.
- Host quarterly public forums to provide updates and gather industry input.
- Develop annual key performance indicators (KPIs) for tourism's contribution to the Games and beyond.

2. Aligning Priorities for Long-Term Impact

- Set annual targets for new tourism infrastructure and allocate dedicated funding streams within the governance framework to support tourism development aligned with 2032 priorities.
- Ensure that *Destination 2045* mirrors the desired outcomes of the organising committee for shared goals and focus.
- Embed legacy and sustainability plans with a tourism legacy plan to ensure long-term benefits post-Games.
- Prioritise infrastructure investments such as eco-tourism facilities and cultural centres to enhance Queensland's global appeal.
- Conduct baseline and longitudinal brand tracking research to build stronger brand awareness of Queensland and its key destinations.

3. Expanding Regional Benefits

- Increase investment in the TEQ event funding for regions outside of SEQ to encourage business events and sporting teams to conduct pre-Games training in the north.
- Ensure the torch relay showcases Queensland's unique natural and cultural assets, beginning in the Torres Strait to highlight its rich First Nations culture.
- Fast-track product and industry development in the Torres Strait to make it visitor-ready, positioning it as a must-visit destination for Games spectators and global audiences.
- Invest in the Aviation Attraction Investment Fund to establish direct international and domestic flights across Queensland, enhancing regional dispersal of visitors.

4. Industry Capacity Building

- Develop targeted programs to help the tourism industry scale to meet 2032 opportunities, including workforce attraction and retention strategies.
- Implement a *Games Uplift Program* to support industry readiness for increased visitor demand.
- Establish a six-year *Trade-Ready Tourism Program* to integrate Queensland's tourism products into global distribution systems, ensuring readiness three years before the Games for effective packaging and dispersal.

5. Enhancing First Nations Tourism

- Establish cultural centres and expand Indigenous tourism products to honour Aboriginal and Torres Strait Islander cultures as a lasting Games legacy.
- Ensure First Nations engagement is embedded throughout the Games, highlighting Queensland's status as home to two of the world's oldest living cultures.

6. Strengthening Queensland's Brand and Nighttime Economy

- Collaborate with the Nighttime Economy Commissioner to extend operating hours for hospitality venues, shops, and transport, enhancing visitor experience and economic activity.
- Support infrastructure and regulatory reforms to position Queensland as a leading 24-hour destination.
- Review liquor licensing regulations to introduce more flexible service hours, particularly in key tourism areas such as airports, entertainment precincts, and major events.
- Conduct a comprehensive review of ID scanning requirements, particularly focusing on the necessity for physical ID presentation. This review should explore alternative verification methods to accommodate international guests who may not have immediate access to their passports, thereby improving their experience and inclusivity.

7. Increasing Accessibility

- Leverage the 2032 Games to position Queensland as Australia's most accessible destination for visitors and locals.
- Invest in inclusive infrastructure, accessible tourism experiences, and universal design principles across transport, accommodation, and attractions.

The 2032 Olympic and Paralympic Games offer a generational opportunity to elevate Queensland's tourism industry. By ensuring the industry is embedded in planning, prioritising regional benefits, and leveraging the Games for sustainable growth, Queensland can create a lasting legacy that benefits all regions and communities. QTIC stands ready to collaborate with stakeholders to make this vision a reality.

3. EXPERIENCE DEVELOPMENT

A dynamic and diverse range of tourism experiences is essential to maintaining Queensland's position as a leading global tourism destination. Investment in new and innovative tourism products will drive economic growth, extend visitor stays, and enhance regional prosperity. Currently, Queensland faces gaps in experience development, with many regions relying on ageing infrastructure and limited new offerings. To remain competitive, the Destination 2045 strategy must

support investment in refreshed, high-quality, and experience-driven tourism products that align with changing visitor expectations and demand.

Sustained tourism growth requires a highly skilled workforce. Shifting perceptions of tourism as solely hospitality-focused is crucial to attracting and retaining talent. The industry offers entrepreneurial and rewarding career pathways, which must be better communicated to inspire workforce participation and longevity.

Dedicated funding for First Nations tourism experiences and partnerships is essential for meaningful industry growth and support Indigenous communities in developing tourism products that showcase their heritage. This program must include feasibility study support, business development, and capability training to ensure long-term success.

The World Economic Forum in 2023 identified that the future of tourism is sustainable and regenerative. To meet this expectation, experiences and destinations need to be empowered and incentivised to deliver sustainable management practices. Whether urban, rural, coastal or remote, all businesses can introduce sustainable management systems within their business. To support this, industry needs capacity building programs that help to build skills and knowledge and incentives to transition businesses.

Recommendations:

1. Increase Investment in Tourism Infrastructure and Experiences

- Implement a significant rolling infrastructure grant fund with a dollar-for-dollar new capital expenditure by investors and operators.
- Introduce payroll tax offsets for tourism businesses investing in capital growth.

2. Support First Nations Tourism Development

- Introduce a rolling Cultural Heritage Grants program to support Indigenous tourism products.
- Provide feasibility study support, business development assistance, and capability training.

3. Invest in and Improve Queensland's Islands:

- Master planning for island destinations, focusing on sustainable tourism, infrastructure, and conservation.
- Work with Traditional Owners and local communities to ensure tourism benefits align with cultural heritage and economic opportunities.
- Upgrade essential infrastructure (sewage treatment, transport, accommodation) to modern standards.
- Improve accessibility and connectivity (ferries, airstrips) to drive visitation and economic impact.
- Redevelop abandoned island resorts, cutting through bureaucracy to restore or repurpose neglected assets.
- Secure sustainable funding & partnerships, leveraging public-private investment models for long-term maintenance and growth.

3. Enhance Business Sustainability

- Offer dollar for dollar support grant funds to offset high insurance costs and develop affordable, tourism-specific policies that abate the increase in cost and availability of insurance premiums.
- Introduce tax incentives to support small and medium-sized tourism enterprises.
- Invest in business capability programs, including sustainability, digital transformation, accessibility upgrades, trade marketing, and carbon reduction initiatives.
- Integrate safe and ethical AI into Queensland's tourism industry to enhance guest experiences and business efficiency while ensuring responsible data use. Support operators in adopting AI-driven solutions such as personalised recommendations, real-time translation, and automated customer service, aligned with global ethical AI standards.

4. Strengthen Workforce Development and Industry Perception

- More promotion of tourism as an entrepreneurial and rewarding career pathway.
- Implement a workforce attraction action group made up of government, industry and QTIC so that the state has an overarching position and action plan to address industry skills shortages.

Without innovation, investment, and a skilled workforce, the Destination 2045 strategy will not fully deliver Queensland's potential to reclaim its position as Australia's premier holiday destination. By integrating these recommendations, the strategy can foster innovation, enhance cultural engagement, and build a resilient tourism industry for the future.

4. EVENTS

Queensland's event industry is a powerhouse of economic growth, innovation, and global connections. Events drive high-value tourism expenditure, foster business opportunities, and enhance Queensland's global reputation. With the 2032 Games on the horizon, now is the time for strategic investment and policy reform to unlock the full potential of the sector.

Recommendations:

1. Strengthening Business Events Competitiveness

- Increase Queensland's Business Events bid fund to match competing states (NSW, VIC, SA, WA) and provide greater subvention assistance to attract global conferences and trade events.
- Establish a 'Valet Service' within government to connect bid teams with key government decision-makers and facilitate site selection and investment discussions.
- Expand Queensland's convention and exhibition centres capacity ensuring targeted investment to keep the state capacity ahead of demand.
- Establish a statewide 'Team Queensland' approach to leverage business and sporting connections for securing major events, business conferences, and international sporting competitions. This initiative would activate industry leaders, athletes, and business figures to promote Queensland as a premier event destination.

2. Growing Regional and Major Events

- Create a Regional Events Fund to ensure the benefits of the 2032 Games extend beyond SEQ, supporting major regional events, infrastructure upgrades, and new event concepts.
- Invest in priority events infrastructure to ensure readiness for world-class events, reduce operational costs, and position Queensland as a leader in adventure and outdoor sports tourism.
- Develop a long-term event strategy to enhance Queensland's market share in high-yield event tourism segments, including mountain biking, cultural festivals, and business events.

3. Improving Event Support and Business Sustainability

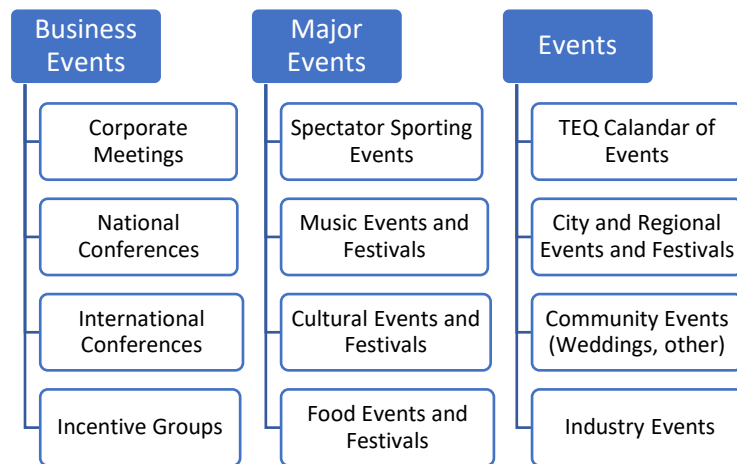
- Establish an 'Events Concierge' to act as a single point of entry for organisers, providing regulatory guidance, funding information, venue support, and destination marketing assistance.
- Review the QDEP funding framework and reduce administration burden for business and TEQ by issuing a 3-year funding contract to those events that have a proven track record.
- Introduce a rolling grant program to offset rising operational costs for event organisers, including insurance cost relief.
- Prioritise Queensland-owned and operated businesses in event-related procurement, ensuring government and quasi government contracts support local suppliers, including venues, catering, and event services.
- Require all Queensland Government-owned venues to serve Queensland produced beer, spirits, and wine to boost regional economies and promote local industries.

4. Data, Sustainability, and Future Planning

- Implement a unified economic impact framework to measure event benefits, including visitor expenditure, dispersal, transport methods, and long-term economic contributions.
- Commission a comprehensive needs analysis of Queensland's events sector, assessing infrastructure, workforce, training gaps, and investment priorities.
- Develop a sustainability toolkit for event organisers, aiming for Queensland to host only environmentally sustainable events by 2027.
- Map out 'lead-up' events to the 2032 Games, including training camps, corporate events, and pre-Games competitions, to maximise economic and industry benefits.

5. Supporting First Nations Cultural Events

- Establish a dedicated grant fund to seed new, annual First Nations cultural events, celebrating Indigenous heritage and increasing visitation to regional communities.
- Partner with First Nations communities to enhance event opportunities, ensuring cultural authenticity and economic benefits.



QTIC calls for a comprehensive events growth strategy

By developing a comprehensive event strategy, inclusive of all sectors of the event industry, Queensland can cement its position as a premier global events destination, driving long-term economic, social, and cultural benefits for the state.

5. CONNECTIVITY AND ACCESSIBILITY

Seamless connectivity is essential for Queensland's tourism industry to drive visitor dispersal, enhance competitiveness, and support regional economies. Strategic investment in transport, telecommunications, and sustainable infrastructure will ensure Queensland can be a world-class destination.

Recommendations:

1. Investing in Transport Infrastructure

- Prioritise key transport upgrades, conduct a comprehensive mapping exercise to identify and address critical gaps in Queensland's transport network, including fast rail access, regional road bottlenecks, and unserved air routes.
- Activate the Brisbane River by establish a cross-government mandate and funding to maximise the river's potential as a transport corridor, improving connectivity to Moreton Bay and enhancing visitor experiences ahead of the 2032 Games.
- Fast-track the Sunshine Coast Rail Line and assess the viability of completing the full rail project by 2032 to ensure enhanced connectivity between Brisbane, the Sunshine Coast, and Moreton Bay, reducing road congestion and improving accessibility.
- Upgrade road infrastructure urgently to improve road quality, rest areas, overtaking lanes, and road shoulders to enhance safety and efficiency for self-drive tourists. Conduct a comprehensive audit of Queensland's road signage to ensure accuracy and consistency, particularly in remote areas where digital navigation tools are unreliable.
- Expand light and heavy rail connectivity to improve visitor access to key tourism hubs, including better integration of airport rail links and regional transit networks to support seamless travel across Southeast Queensland.

- Enhance water transport options by developing a comprehensive ferry network across SEQ, leveraging the region's waterways to improve connectivity between coastal destinations, islands, and urban centres, reducing road congestion and enhancing the visitor experience.

2. Strengthening Air and Cruise Access

- Expand the Aviation Attraction Investment Fund (AAIF) – Invest an additional \$100M to grow new and existing international routes, support selected domestic routes to and from international gateways and strengthen freight services that underpin route sustainability.
- Launch a Cruise Attraction Investment Fund (CAIF) – Capitalise on Queensland's growing cruise market by investing in initiatives to attract more international turn-around and base-porting cruise vessels.

3. Supporting Sustainable Transport Solutions

- Support growth and investment in Queensland's SAF sector to align with global trade partners, such as Japan, that are mandating SAF adoption in the coming decade.
- Conduct a state-wide gap analysis to identify critical shortfalls in EV charging stations, particularly in regional and remote areas, and implement solutions to ensure Queensland remains an EV-friendly destination.
- Support marine industry transition by providing investment and incentives for tourism operators transitioning to low-emission technologies, particularly in the marine sector where alternatives to diesel remain costly and limited.

4. Fixing Telecommunications and Digital Connectivity

- Address mobile and internet connectivity gaps in regional and remote Queensland to improve visitor safety, enhance the visitor experience, and support local economies.
- Map areas with poor 4G and 5G connectivity that do not meet official black spot criteria but still hinder business operations and visitor experiences.

5. Leveraging Tourism to Improve Community Transport

- Identify opportunities where tourism demand can support expanded public transport routes, benefiting both visitors and local communities.
- Embed accessibility criteria in all government-funded infrastructure programs to support the needs of diverse travellers, reinforcing Queensland's position as an inclusive destination.

6. INVESTMENT ATTRACTION

The tourism industry is one of the most innovative and entrepreneurial sectors of the Queensland economy, constantly evolving to meet changing consumer demands. However, a robust infrastructure pipeline is crucial to stimulate new tourism product development and enhance existing offerings. High costs, red tape, and a lack of government interdepartmental coordination have significantly reduced investor confidence in Queensland. The current reactive approach to supply-side activities has left the state ill-prepared to meet growing consumer demand.

The upcoming Brisbane 2032 Olympic and Paralympic Games necessitate a strategic focus on infrastructure development, particularly in accommodation, transport, and venue capacity. Queensland must establish the right investment environment, leveraging public-private partnerships and foreign investment to accelerate tourism infrastructure development.

Recommendations:

1. Streamlining Tourism Investment Framework

- Establish a whole-of-government case management team to oversee tourism investment, reporting to the Tourism Cabinet Sub-Committee. This team will provide project facilitation support, consult with local councils, and ensure regulatory efficiencies.
- Package government incentives for developers, including waiving of charges, payroll tax rebates, and streamlined development approval (DA) processes.
- Develop a clear, bipartisan-supported tourism investment strategy, with targeted incentives to attract both domestic and international investors.
- Develop and promote key greenfield and brownfield sites to attract investment.
- Host an annual Queensland Tourism Investment Forum to connect developers, investors, and government representatives.

2. Increasing Investment in Accommodation

- Conduct detailed modelling to predict room night requirements for the Brisbane 2032 Games, factoring in visitor categories such as spectators, athletes, officials, media, and volunteers.
- Implement a state-wide accommodation investment attraction strategy, consolidating responsibilities across Trade and Investment Queensland, Queensland Treasury, the Department of Tourism, and local government.
- Establish specific accommodation targets (e.g., required numbers of 5-star, 4-star, serviced apartments) to meet projected demand across southeast Queensland and regional centres.
- Set and track timeframe targets for delivery, from site identification to construction completion, ensuring new hotels and accommodation projects align with Olympic deadlines.
- Encourage innovative solutions such as modular hotel construction, floating hotels, secondary dwelling approvals for short-stay rentals, and expansion of serviced apartments to supplement existing capacity.
- Implement a standardised agritourism investment framework, reducing regulatory barriers for primary producers to offer farm-stay accommodations.

3. Leveraging Public-Private Partnerships for Infrastructure

- Address shortcomings in Brisbane's cruise terminal infrastructure, improving visitor experience by relocating or upgrading terminals to more visually appealing and functional locations.
- Develop First Nations Cultural Centres and tourism experiences that celebrate Aboriginal and Torres Strait Islander heritage, aligning with global demand for immersive cultural tourism.
- Expand Queensland's convention and exhibition centre capacity to accommodate the diverse range of meetings, exhibitions, and hospitality functions associated with the Olympics and broader tourism growth.
- Introduce new grant funds to underwrite feasibility studies for new tourism developments and expand government-backed low-interest loan programs for targeted infrastructure projects.

4. Climate Resilience and Future-Proofing Queensland's Tourism Industry

- Establish an infrastructure resilience plan to ensure major roads, transport systems, and tourism sites are built to withstand increasing extreme weather events caused by climate change.
- Create funding programs to support businesses in adopting climate adaptation measures, including insurance affordability solutions and disaster preparedness planning.

5. Strengthening Data and Investment Tracking

- Implement a unified economic modelling system to track tourism infrastructure investments and identify priority projects.
- Set annual investment targets and establish transparent reporting mechanisms under Destination 2045 to measure success in attracting new tourism infrastructure.

Queensland must act swiftly to position itself as a premier tourism investment destination. With the right policy settings, regulatory efficiencies, and investment incentives, the state can enhance its tourism product, meet the demands of the 2032 Olympics, and secure long-term economic growth.

7. ECOTOURISM

Ecotourism, as defined by the United Nations Tourism Organisation, encompasses nature-based tourism that prioritizes conservation, education, and community benefits. Queensland has significant potential to be Australia's leading ecotourism destination, yet it lags behind competitors.

Inadequate infrastructure, limited financial support, and complex regulatory frameworks pose significant challenges to tourism development. Restricted transport, accommodation, and amenities—such as public toilets and parking—hinder accessibility, while prolonged park closures for maintenance further impact visitor experiences.

In contrast, destinations like Queenstown and Swedish Lapland succeed through strategic planning and experience clustering. Financially, the lack of government grants, incentives, and investment

frameworks discourages private sector participation, with excessive costs and low viability deterring new developments.

Additionally, overly complex regulatory approvals across multiple levels of government create unnecessary barriers, while the absence of clear sustainability regulations risks environmental degradation and bureaucratic inefficiencies. Addressing these issues is crucial to fostering a thriving and sustainable tourism industry.

Queensland's tourism operators play a critical role in environmental stewardship, particularly in National Parks. Sustainable businesses should be recognised and supported through extended permits and investment incentives. Tourism operators contribute to conservation through community-led waste management, biodiversity support, and cultural engagement and this provides a platform to work collaboratively with industry to continue to protect our environment.

Recommendations:

1. Develop a Five-Year Queensland Ecotourism Plan with outcomes

- Position Queensland as Australia's #1 ecotourism destination, focusing on visitation to protected areas with expert guides, sustainability principles, and conservation.
- Establish a partnership model between protected area managers and the tourism industry, moving beyond a management approach to reciprocal responsibilities.
- Set ambitious growth targets for ecotourism product development and visitor engagement.
- Implement an industry-wide ESG framework that aligns with global standards and investor expectations.

2. Streamline Regulation & Attract Investment

- Create a whole-of-government case management team to guide investors through permits, approvals, and project facilitation, removing impediments and limiting cost overruns. This work should report to the Tourism Cabinet Sub Committee.
- Develop a statewide ecotourism investment strategy with First Nations, conservation groups, and communities, ensuring stakeholder collaboration from the outset.
- Identify greenfield and brownfield ecotourism locations for investment promotion, supported by a clear regulatory framework.
- Implement the Queensland Audit Office Report on Growing Ecotourism and develop a comprehensive statewide ecotourism policy that defines the vision, objectives, and conservation-tourism balance in accordance with the recommendations and establish a clear roadmap with stakeholder responsibilities, timelines, and KPIs to measure and track progress.

3. Empower Tourism Operators & Extend Permits

- Automatically extend Commercial Activity Permits in protected areas for high-standard ecotourism operators, modelled on the Great Barrier Reef approach.
- Shift to longer leases (21+21 years) for permanent infrastructure in parks to enhance bank confidence and investment viability.
- Adopt an outcomes-based approach to extended permits, ensuring operators deliver measurable sustainability benefits.

4. Strengthen Conservation & Protected Areas Tourism:

- Establish Regional Roundtables between the tourism industry, Traditional Owners, and Park Managers to identify opportunities, challenges, and investment needs.
- Increase investment into National Parks to eliminate long closure periods for maintenance.
- Develop wildlife tourism partnerships with QPWS to enhance the management, conservation, and presentation of endangered species, such as Koalas and crocodile identification programs.
- Create a statewide regenerative tourism model with partners like Reforest to channel visitor contributions into conservation efforts.
- Continue investing in the Wangetti Trail, engaging experienced trail builders for Stage 2.
- Maintain investment in accessible trails into National Parks for improved visitor experiences.

5. Boost International Market Share & Ecotourism Education

- Regain lost international market share by marketing how tourism supports conservation of the Great Barrier Reef (GBR).
- Continue funding the GBR Education Subsidy, which has already delivered \$16.6M in economic benefit and 32,000 student visitors.
- Educate the industry on EU Green Claims regulations, Mandatory Carbon Reporting, and low-carbon adaptation strategies to maintain global competitiveness.
- Provide grants & mentoring programs to support renewable technology adoption, focusing on the reef fleet and long-haul bus transition to renewable fuels.

9. SUMMARY

Queensland has all the ingredients to be a global tourism powerhouse, but without decisive action, its position will continue to erode. The Destination 2045 Strategy is an opportunity to reset, innovate, and future-proof the industry, ensuring that tourism delivers economic, social, and cultural benefits for decades to come.

Immediate priorities must include:

- Implementing a Destination 2045 Scorecard with clear performance indicators to measure success.
- Securing bipartisan support to ensure longevity and stability of tourism policies.
- Expanding investment in tourism infrastructure, workforce development, and experience innovation.
- Addressing insurance and operational cost barriers to support business sustainability.
- Embedding climate resilience and disaster preparedness in infrastructure planning.

The 2032 Games must be leveraged to amplify Queensland's global tourism brand, ensuring benefits extend beyond Southeast Queensland. Government, industry, and stakeholders must work together to drive real change, unlock new opportunities, and create a more competitive, sustainable, and resilient visitor economy.

QTIC stands ready to support this transformation and calls on the Queensland Government to take bold, measurable steps to ensure Queensland reclaims its place as Australia's premier tourism destination.

About QTIC

QTIC is the peak industry body and leading advocate for the tourism, hospitality, and events sectors in Queensland, committed to the growth and sustainability of the state visitor economy. Our efforts focus on powerful lobbying, policy development, and collaboration with key industry stakeholders to create a favourable business environment for operators.

As a not-for-profit, membership-based organisation, we take pride in ensuring that the concerns and needs of our members and the broader tourism industry inform all relevant policy debates and that businesses have strong representation in decision-making processes. By promoting the value and importance of tourism in government forums and to the wider community, we help to create a vibrant, diverse industry that benefits all.

Through delivery of workforce and skilling programs, advocating for attraction and infrastructure investment, and working with the private sector to develop innovative solutions to tourism priorities, QTIC continues to serve members and industry. We also provide expert advice and support, including workforce and business development opportunities and access to vital industry insights.