



Submission to the Joint Standing Committee on Northern Australia

**Inquiry into Opportunities and Methods for
Stimulating the Tourism Industry in Northern Australia
March 2017**



Submission Collaborations & Endorsments

QTIC would like to acknowledge the following organisations for their assistance in preparing this submission:

Tourism and Events Queensland
Capricorn Enterprise
Mackay Tourism Limited
Outback Queensland Tourism Association
Tourism Tropical North Queensland
Tourism Whitsundays
Townsville Enterprise Limited



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Summary of Recommendations

Listed below are a summary of recommendations made by QTIC to this *Inquiry into Opportunities and Methods for Stimulating the Tourism Industry in Northern Australia*.

>> Federal Government Tourism Initiatives

Tourism Demand Driver Infrastructure (TDDI) Program

- Continued funding for industry capability building across Queensland, targeted at key priority areas that assist in delivering Destination Q and Tourism 2020 outcomes as well as general Northern Australia development goals.
- Support for projects that are tailored to regional needs by working in consultation with regional tourism organisations and with reference to regional Destination Management Plans (DMPs).
- Continue the strong working relationship with the State Government (through the Department of Tourism, Events and Small Business - DTESB) and regional tourism organisations under the TDDI program.

>> Reef 2050

- Development by the Australian Government of a full investment plan for the Great Barrier Reef to support the implementation of the Reef2050 Plan and all associated measures.
- Development of a comprehensive and inclusive governance structure for the Great Barrier Reef and Reef-related catchment areas.

>> Industry-led Tourism Initiatives

QTIC's Tourism Indigenous Champions Network

- Establish a Northern Australia Indigenous Business Development Fund and appropriate support service including, but not limited to, mentoring programs.

>> Tourism Promotion

- Foster focused coordination between Tourism Australia and state and regional tourism organisations in the branding and marketing efforts for Northern Australia destinations to international target markets.

>> Local Government

- Promote local government engagement with and support of with regional tourism networks, in the development and promotion of regional tourism with a focus on local needs and opportunities.

Recommendations cont...

>> Tourism Development Opportunities in Northern Queensland

QTIC supports all submissions made by Queensland regional tourism organisations to this Inquiry.

- Consult all strategic plans relevant to all users of public infrastructure, including state tourism strategies and regional tourism destination plans.
- Work within the directions of existing tourism opportunity plans to direct the development of tourism in Northern Australia.
- Assist local tourism regions to develop destination management and opportunity plans where they do not yet exist.
- Invest in and supporting the development of innovative solutions for the built environment, businesses, products and people must be an ongoing objective for tourism in Northern Australia.
- Support greater tourism access and enterprise opportunities in Northern Australia by unlocking opportunities, including in protected areas such as National Parks, for sustainable tourism use and development.
- Support and investigate the development of cultural tourism opportunities in Northern Australia.
- Support the facilitation of innovative, high-quality and sustainable accommodation development outcomes for Northern Australia that will appeal to a broader visitor market.
- Investigate the development and growth of events opportunities in Northern Queensland locations, with appropriate funding and support.
- Invest in visitor information signage and the consideration for ongoing investment in a world-class visitor information service program.
- Invest in a visitor research program in Northern Australia.

>> Tourism Workforce Development and Business Capacity Building

- Continue to support labour market programs for the upskilling of workers and the promotion of transferrable skills that will help to meet future demand in tourism and service industries.
- In association with education institutions (VET and higher education), continue to support the promotion of tourism as a long-term aspirational career, via adequate training funding (equitable access to student loans for students in tourism programs), entrepreneurial programs and training packages.
- Develop new education and training products in Northern Queensland, by targeting and partnering with existing educational institutions to develop specialised educational products unique to the region.
- A continued focus on building international education through the regional northern Australia universities and training providers, supported by seamless visa processing and streamlined application process for priority occupations.
- Work with industry to deliver training and support programs to build local business capacity.

Recommendations cont...

>> Communications and transport

- Develop a communications infrastructure and digital enterprise support plan for Northern Australia.
- Collaborate with the Queensland Government in the delivery of the Queensland Tourism and Transport Strategy as relevant to Northern Queensland.
- Develop an aviation plan for Northern Australia.
- Support the expansion of access for cruise ships into Northern Australia ports and islands whilst maintaining the health of marine assets such as the Great Barrier Reef.
- Engage with the QTIC Drive Alliance on the identification of drive tourism priority projects in Queensland as part of the Northern Australia tourism development agenda.
- Support the maintenance and growth of passenger rail experiences in Northern Australia.

>> Innovation and Sustainability

- To ensure the resilience of tourism in Northern Australia, investigate and facilitate innovative sustainable infrastructure outcomes that are adaptive to the threats of climate change.

QTIC endorses the following priorities identified by the Australian Chamber of Commerce and Industry ¹.

“Driving down the costs of operating in the north and making it more attractive for investors and workers is key to realising the vision. Businesses tell us the top three factors they consider when contemplating expanding to regional Australia are workforce, telecommunications and roads.”

“We need better cooperation between the Federal Government and the governments of Queensland, Western Australia and the Northern Territory. We also need cooperation with business and local communities, including Indigenous communities. A good start is simplifying land arrangements to boost investment, such as more efficient native title processes and better use of pastoral land.”

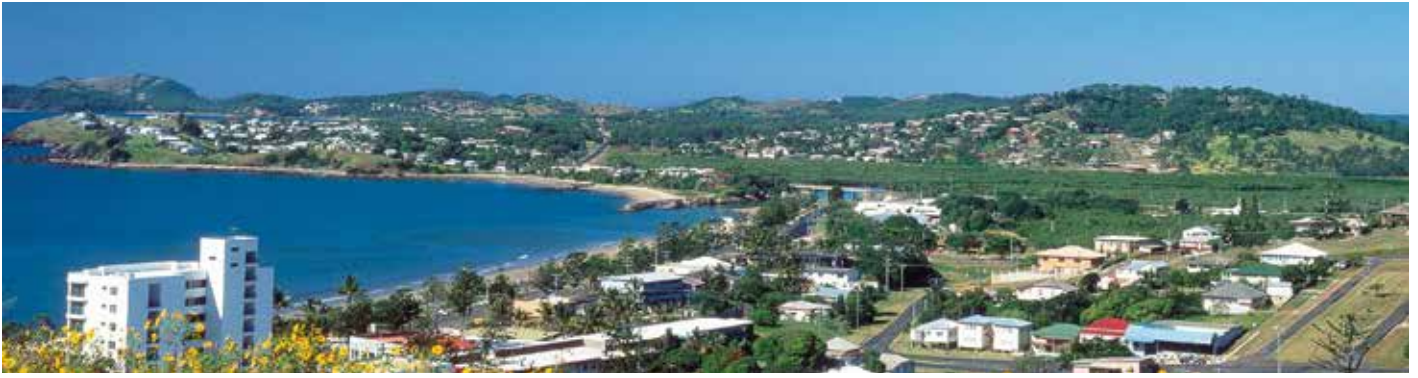
“Lack of access to water is a major constraint on economic growth in Northern Australia, and building dams to strengthen irrigation and agricultural production is key to the solution. We must not allow ideological opposition to dams to hold back development. Northern Australia’s rainfall is almost double that of the Murray-Darling Basin, but much of it flows unused into the sea from highly seasonal rivers.”

“The \$600 million Northern Australia roads package will make it easier to move people and freight all year round. The Government should focus on roads identified by Infrastructure Australia as adding to road network connectivity and capacity.”

“The \$75 million Co-operative Research Centre for Developing Northern Australia will focus on agriculture, food and tropical medicine, allowing business and government to work together to realise the vision outlined in the White Paper.”

- *Australian Chamber of Commerce and Industry.*

¹ Australian Chamber of Commerce and Industry, Media Release: Business welcomes plan to unlock Northern Australia’s economic potential, 18 June 2015.



1. Introduction

The Queensland Tourism Industry Council (QTIC) welcomes the opportunity to provide a submission to the Joint Standing Committee on Northern Australia on the *Inquiry into Opportunities and Methods for Stimulating the Tourism Industry in Northern Australia*.

QTIC supports the focus on developing the tourism industry in Northern Australia, an obvious industry to drive northern economic and population growth, whilst protecting the natural and cultural heritage values of the northern regions.

Development of a suitable tourism economy in Northern Australia requires a coordinated approach from industry, community, local councils and state and federal governments. Building strong partnerships is critical. QTIC offers its support towards realising positive outcomes for the long-term tourism and economic development in Northern Australia.

2. 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 18 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 (Australian Tourism Industry Council), to strengthen the voice of tourism in all relevant policy forums. QTIC is a member of the Australian Chamber of Commerce and Industry and the Australian Tourism Industry Council (ATIC).

QTIC remains committed to working with government and industry through the following national and state strategies and working groups:

- Australian Government, Tourism 2020, Tourism Industry Potential;
- Queensland Government, DestinationQ Industry Partnership Agreement;
- Australian Tourism Industry Council
- Committee for QLD Recreation Trails for Tourism
- The Alliance for Sustainable Tourism
- Jobs Queensland Board
- QLD Tourism Infrastructure Fund Panel
- QLD Tourism and Transport Industry Reference Group
- Reef and Rainforest Research Centre Board
- Regional Development Program



3. Tourism in Northern Australia

3.1 Value of Tourism to Northern Queensland

3.1.1 Economic Contribution

The August 2016 *Tourism and Hotel Market Outlook* by Deloitte states:

“Huge growth in leisure travel to Australia saw international visitor numbers surge 10% over the year to June – the fastest rate of growth since the mid-1990s. At the same time, domestic travel posted its strongest growth since records began nearly two decades ago.” DELOITTE ²

The tourism industry in Queensland contributed \$23 billion to Queensland’s Gross State Product (GSP), representing 7.5% of total GSP and generated \$6.6 billion in exports in the year ending June 2015, making it one of the state’s largest export industries ³.

In recent years, there has been widespread recognition by government and the business community that tourism is a critical driver of the Queensland economy. On the back of a slowdown in the resources industry, the tourism industry has experienced resurgence and is flourishing against a relatively soft economic backdrop.

The rise of the travelling middle-class in China coupled with a favourable Australian dollar has seen visitor expenditure in Queensland grow to an all-time high of \$19.6 billion, a \$53.8 million daily spend in the local economy for the year ending March 2016 ². The return of tourism expenditure is high, with every dollar tourism earns adding an additional 87 cents to other parts of the economy ⁴.

Tourism is experiencing significant growth globally, and Northern Australia is right on the doorstep of key international travel markets in Asia.

² - Deloitte (Aug 16) *Tourism and Hotel Market Outlook*

³ - *Tourism and Events Queensland, Tourism Economic Facts, March 2016*

⁴ - *Tourism Australia 2014*

Boys by The Burdekin River, Charters Towers, Outback Region. Photographer P&D Scott. Copyright TEQ



3.1.2 Employment

Tourism is a major employer of Australia's workers. In 2015–16, the industry provided jobs for 580,200 workers directly – equivalent to 4.9% of Australia's total workforce. Tourism's workforce is larger than that of Mining (227,800 workers), Agriculture (321,600 workers) and Utilities services (144,000 workers) ⁵.

Tourism is a key economic driver in many Queensland regions, supporting regional employment and community growth, employing more than 233,000 people directly and indirectly, or 9.4% of all people employed in Queensland ⁴. This is substantially more than the Queensland mining sector (79,000 direct jobs) or agriculture, forestry and fishing combined (56,900 direct jobs).

Despite the strong employment of Queensland residents, the Queensland tourism industry has a labour shortage ⁵, discussed further below in Box 1.

Box 1: Queensland Tourism Labour and Skills Shortage

In the most recent *Australian Tourism Labour Force Report: 2015-2020* (October 2015), Tourism Research Australia and Deloitte Access Economics estimate an implied current **shortage of 10,388 employed persons in the Queensland tourism industry**. With strong projected growth for the tourism industry it is anticipated that there will be an accumulated **demand for 23,481 new workers by 2020**.

Across Australia, businesses in the café and restaurant industries report greater labour market difficulties relative to those in the accommodation or attraction industries. However, in Queensland the top tourism-related occupations experiencing deficiencies in Queensland are Cleaner, Guest Service, and Receptionist – suggesting deficiencies across all types of tourism businesses.

Source: Tourism Research Australia

Any labour shortage in the tourism industry is also compounded by the fact that the industry also has a high staff turnover. There is, therefore, the need for a constant pipeline of new skilled labour to support the growing tourism industry in Queensland.

>> Refer section 4.2.4 for QTIC's recommendations for Tourism Workforce Development in Northern Australia.



3.2 Federal Tourism Initiatives

3.2.1 Tourism 2020

In December 2011, the Federal Government announced its national strategy *Tourism 2020*, with a goal of doubling the value of tourism to \$140 billion by 2020.

Ensuring the growth and stability of both the supply of the tourism labour market and the demand for tourism products will dictate the success or failure of Australia's tourism industry in achieving its global potential. The Queensland Government and the Queensland tourism industry have embraced the effort to reach the national tourism target.

One of the key factors that will dictate the success or failure of Australia's tourism industry to meet its global potential is to meet the expected surge in demand with sufficient increases from the supply side of the tourism industry, such as tourism product, aviation capacity and transport infrastructure.

The Tourism 2020 target still stands. The Northern Australian tourism development agenda can significantly contribute to the 2020 and future tourism growth goals.

“There is an opportunity to expand the current Northern Australia Infrastructure Facility to include grant opportunities for smaller tourism businesses. This fund is already proving to be too restrictive for any development, let alone tourism development.

The majority of tourism businesses are small to medium enterprises (SMEs), so a dollar for dollar grant opportunity is much more realistic.” - CAPRICORN ENTERPRISE



3.2 Tourism Demand Driver Infrastructure (TDDI) Program

The Australian Government is providing funding to the states and territories over four years as part of the Tourism Demand Driver Infrastructure (TDDI) Program, which commenced in 2014-15. Through TDDI, the Commonwealth will provide **\$43.1 million** over four years to the State and Territory governments. In Queensland, the Department of Tourism, Major Events, Small Business and the Commonwealth Games (DTESB) is responsible for administering the TDDI fund. DTESB determines the process by which the TDDI funding will be allocated in the State and which projects will receive TDDI funding. Projects must align strategically with relevant state, regional and destination plans.

Projects that drive demand, improve quality and increase tourism expenditure will assist the tourism industry in meeting Tourism 2020 targets. The ongoing funding and delivery of the TDDI program will drive tourism demand in Northern Australia.

DTESB has identified the following TDDI infrastructure categories relevant for Queensland:

- a) Built – such as, but not limited to, mixed-used facilities, exhibition, convention and events facilities, cultural institutions, entertainment and sporting facilities, city/town precincts and tourist attractions.
- b) Enabling – such as, but not limited to, Indigenous tourism development, the development of tourism networks, plans and feasibility studies, and programmes to improve industry capability and capacity.

DTESB has engaged QTIC to administer the Tourism Industry Capability Program (the enabling infrastructure category) from 2014-15 to present. QTIC continues to work collaboratively with Regional Tourism Organisations (RTOs) to understand the capability needs of regional tourism industry operators. Targeted capability programs are developed by the RTOs to meet these needs utilising providers that understand their regional perspective.

Since 2014-15, QTIC has identified four key areas for industry capability programs that align with state and regional plans and Tourism 2020 targets:

- 1. Quality service
- 2. Digital capability
- 3. Business capability building
- 4. Events

3.2 Tourism Demand Driver Infrastructure (TDDI) Program cont...

The delivery of TDDI funded projects in Queensland since the 2014-15 program round are shown below in Table 1. In 2015-16, all thirteen tourism regions (including the six Northern Queensland tourism regions) and 2,515 participants benefited from the TDDI funding of 35 projects across the State.

Table 1: Delivery of TDDI Projects in Queensland

Program	Regions	Projects	Participants
2014-15	7	23	599
2015-16	13	35	2,515
2016-17	<i>in progress</i>	<i>in progress</i>	<i>in progress</i>

On the horizon:

- QTIC will continue to work collaboratively with the Queensland Government to seek funding for 2017-18 for industry capability programs.
- QTIC recommends a collaborative approach with RTOs that allows a targeted method that identifies areas for capacity building that directly relates to destination plans.

Recommendations

- Continued funding for industry capability building across Queensland, targeted at key priority areas that assist in delivering Destination Q and Tourism 2020 outcomes as well as general Northern Australia development goals.
- Support for projects that are tailored to regional needs by working in consultation with regional tourism organisations and with reference to regional Destination Management Plans (DMPs).
- Continue the strong working relationship with the State Government (through the Department of Tourism, Events and Small Business - DTESB) and regional tourism organisations under the TDDI program.



3.2.3 Reef 2050

The Great Barrier Reef is a designated World Heritage site and a significant natural asset to Australia's community, environment and tourism economy.

In 2012, representatives of the UNESCO World Heritage Centre and International Union for Conservation of Nature (IUCN) undertook a mission to the Great Barrier Reef to monitor the state of conservation and threats facing the Reef. The subsequent UNESCO Mission Report concluded that the Great Barrier Reef *'continues to demonstrate Outstanding Universal Value', however 'the future conservation of the Great Barrier Reef World Heritage area is at crossroads and decisions that will be taken in the immediate future will be decisive for the long-term health of the property as a whole.'*

The subsequent overarching vision of the Australian Government's 2015 release of the **Reef 2050 Long-Term Sustainability Plan**⁶ is:

“To ensure the Great Barrier Reef continues to improve on its Outstanding Universal Value every decade between now and 2050 to be a natural wonder for each successive generation to come.” REEF 2050 LONG-TERM SUSTAINABILITY PLAN

Tourism and the Great Barrier Reef⁷

- The Australia-wide economic benefit associated with the Great Barrier Reef in 2012 was \$5.7 billion, with tourism accounting for over 90% or \$5.2 billion of the economic benefits generated.
- Tourism activity associated with the Great Barrier Reef supports 64,000 full-time equivalent jobs, and 25% of coastal residents rely on the Great Barrier Reef for at least part of their income.
- Australia's tourism industry is internationally renowned for its ecological diversity, with Queensland's Great Barrier Reef almost certainly the most valuable asset, underpinning the growth potential and competitive advantage of our tourism industry.

QTIC supports the Australian Government's strong ambition to protect and responsibly manage the Great Barrier Reef region consistent with the principles of ecologically sustainable use and to enhance its Outstanding Universal Value attributed to the World Heritage status.

The Reef 2050 Long-term Sustainability Plan is recognised as a comprehensive plan for ensuring the long-term sustainability of the Great Barrier Reef however adequate commitment – supported by sufficient funding – for the implementation is needed.

⁶ - Commonwealth of Australia, 2015 Reef 2050 Long term Sustainability Plan

⁷ - Deloitte 2013, Economic Contribution of the Great Barrier Reef

3.2.3 Reef 2050 cont...

In 2016, in a historic partnership, peak bodies QTIC, Queensland Farmers' Federation and WWF-Australia joined forces to apply a robust economic assessment to value the Reef. The peak bodies jointly commissioned international consulting firm Jacobs for a new report: Investing in the Great Barrier Reef as economic infrastructure. Jacobs used economic tools normally applied to built assets to determine the Great Barrier Reef's asset value and annual investment requirements.

An extract of the recommendations and findings from the report are shown below in Box 2.

Box 2: Investing in the Great Barrier Reef as Economic Infrastructure

Recommendations and Findings:

1. *We recommend our conservative asset value for the GBR of \$21 billion.*
2. *We note that based on this asset value, an appropriate level of annual funding (including operations, maintenance and depreciation) for the GBR would be \$830 million. Depreciation could arguably be excluded as the GBR is not manmade and the capital does not need to be returned to the investor.*
3. *We recommend a minimum annual funding of \$547 million for operation and maintenance of the GBR. That is, to achieve appropriate funding levels for a regulated and essential community asset of comparable value, governments should increase existing funding by \$332 million pa (from \$215 million pa) to \$547 million pa.*
4. *We note that \$830 million of funding to maintain the asset condition supports a contribution to the Australian economy of \$4.7 billion, returning between 5 and 6 times the value of the funding.*
5. *We estimate that tourism businesses and employees contribute \$836 million in taxes to the Australian and Queensland Governments. We note some of these funds could be used to maintain the GBR asset condition.*
6. *We also recommend that a detailed business case (including cost-benefit analysis) be completed to support the recommended higher levels of funding needed to sustain GBR assets. This analysis should include the significant economic benefits that would likely occur for agriculture as a key target for investment.*

Extract from Jacobs Report: Investing in the Great Barrier Reef as economic infrastructure, October 2016 (p. 12)

Recommendations

- Development by the Australian Government of a full investment plan for the Great Barrier Reef to support the implementation of the Reef2050 Plan and all associated measures.
- Development of a comprehensive and inclusive governance structure for the Great Barrier Reef and Reef-related catchment areas.

3.3 Queensland Government Initiatives

The Queensland Government has committed to *The Queensland Plan: Queenslander's 30-year vision* as the strategic policy framework for Queensland and articulating the aspirations for Queenslander's and the long-term future for the state.

Tourism is forecast to be a major contributor to Queensland's economic growth and the Queensland Government and the Queensland tourism industry share an ambition to restore Queensland's position as Australia's premier tourism state. The former state government supported a goal of doubling visitor expenditure, to \$30 billion by 2020. The current Palaszczuk Government has committed to maintaining these goals, and to continue working with industry leaders to develop a prosperous and sustainable tourism industry.

The growth of the tourism sector and visitor expenditure in the Northern Queensland regions will be a significant contributor in achieving this state industry potential.

Advancing Tourism 2016-20

The Queensland Government's *Advancing Tourism 2016-20* agenda seeks to capitalise on the opportunity afforded by unprecedented growth in tourism to increase market share and boost tourism jobs by targeting four priority areas:

1. *grow quality products, events and experiences;*
2. *invest in infrastructure and access;*
3. *build a skilled workforce and business capabilities; and*
4. *seize the opportunity in Asia.*

An industry commitment to the *Advancing Queensland* strategic directions and the *Advancing Tourism in North Queensland* directions, along with feedback from industry partners across the state, forms the foundation to QTIC's response to this Inquiry.

>> *The Queensland Government's Advancing Tourism in North Queensland plan is provided in Appendix 1.*

Queensland Ecotourism Plan 2016-20

The Queensland Government has further committed to the development of sustainable tourism experiences and enterprises in Queensland's national parks via the *Queensland Ecotourism Plan 2016-20*, which outlines the following strategic directions relevant to South East Queensland:

- *driving innovation in ecotourism experiences;*
- *stimulating investment in new and refurbished ecotourism opportunities;*
- *expanding authentic Indigenous ecotourism experiences; and*
- *promoting Queensland's world-class ecotourism experiences.*

3.3 Queensland Government Initiatives cont...

Queensland Tourism Workforce Plan (in-progress)

Jobs Queensland is working with the Department of Tourism, Major Events, Small Business and the Commonwealth Games to deliver a *Queensland Tourism Workforce Plan*. To do this, Jobs Queensland has established an Industry Advisory Group (IAG) to gather industry intelligence and to provide advice and access to networks and information to support in the delivery of the Tourism Workforce Plan. The Tourism IAG is chaired by the CEO of QTIC and a member of the Jobs Queensland Board.

The *Queensland Tourism Workforce Plan* key objective is to ensure Queensland has a skilled workforce ready to respond to the demand for skills and labour to support a growing and thriving tourism industry.

3.4 Industry-led Initiatives

3.4.1 QTIC's Tourism Indigenous Champions Network

QTIC's Tourism Indigenous Champions Network (Champion's Network), supported by Star Entertainment, is comprised of representatives from over 30 tourism organisations in Queensland who volunteer to work collaboratively toward the goal of **"1,000 new Indigenous faces in the tourism industry and 20 new Indigenous tourism businesses" by 2020.**

The Champions Network provides industry resources to assist in the recruitment, employment and retention of Aboriginal and Torres Strait Island staff in tourism and hospitality organisations. The volunteers engage with industry across multiple forums to facilitate awareness, cross cultural understanding and engagement to drive Indigenous employment. They have also instigated Indigenous Employee Networks (South East Queensland and North Queensland chapters), with the aim to connect Indigenous tourism employees across the state, share stories, and provide ongoing career support and advice.

On the horizon:

The Champions Network is set to expand in 2017 with the formation of a Western Chapter. This addition to the Network is designed to complement the work achieved by the Northern and South East Queensland -region chapters, and will offer additional support to tourism businesses in the West.

QTIC welcomes the continued support of State and Federal Governments to QTIC's Tourism Indigenous Champions Network, to assist in identifying opportunities for further expansion for the network across Northern Australia and including connections with existing business networks.

QTIC encourages the establishment of an Indigenous Business Development Fund, which will support the development of Indigenous-owned tourism enterprises, key to the success of cultural tourism in Northern Australia. QTIC offers to work with all levels of government and to apply the services and expertise of the Indigenous Champions Network, such as mentoring opportunities, cultural awareness workshops, and business and policy advisory services.

Funding alone will not realise Indigenous business development opportunities. There is a need for program to be linked to existing business support services and networks; where gaps are identified, support infrastructure need to assist on access and guidance.



Case study: Indigenous Volunteers in Visitor Information Centres

Funded by the Queensland Government Department of Aboriginal and Torres Strait Islander Partnerships, this pilot program engaged the Champions Network to introduce Indigenous volunteers into Visitor Information Centres to provide cultural and heritage information to tourists and promote indigenous product across the state. The program identified varying models for supporting Indigenous engagement across the VIC networks. The program was proven to work successfully and is set to be expanded to other visitor information centre across the state. The Champions Network will continue to be involved in the program, whilst also working on new approaches for engaging Indigenous employees in the tourism industry.

Recommendation

- Establish a Northern Australia Indigenous Business Development Fund and appropriate support service including, but not limited to, mentoring programs.



Photo: The 2016 Queensland Tourism Awards Qantas Award for Cultural Tourism was presented to the Mossman Gorge Centre. Pictured - Natalie Chapman, Roy Gibson and Rachel Hodges.



3.4.2 Tourism Industry Transformation Initiative

Background:

In 2012, at the inaugural DestinationQ tourism industry forum facilitated by the Queensland Government in collaboration with industry, a key topic for discussion was the challenges of future-proofing the Queensland tourism industry. Discussion about the industry structures, creating innovative and sustainable solutions for industry development, capability and capacity building and marketing were collated and reviewed by the Queensland Government and the Queensland Tourism Industry Council. Feedback from the industry indicated that there are opportunities to find new ways to work more effectively together to suit a dynamic and ever evolving environment.

Progressing the initiative:

Since 2012, the QTIC board has committed to exploring the opportunities and strategies that can help address these challenges, with the objective of “enhancing the tourism industry’s competitiveness, maximising efficiencies, capitalising on our unique natural assets in order to position tourism as the key economic driver for Queensland and future proofing the industry”.

The QTIC board has progressed the Industry Transformation initiative in the following stages:

- Stage 1: providing insight and analysis into our current industry models, and international models that are recognised as best practice in tourism competitiveness.
- Stage 2 (in progress): initiating industry consultation to gauge the views on possible transformation and clarify opportunities identified through the initial research.
- Stage 3: an independently chaired consultative committee will assess the research and industry feedback and determine what the best models for industry collaboration may look like in Queensland, and what resourcing mechanisms could support the best outcome. The committee will provide the board with a set of key recommendations and strategies that can guide the path forward.



3.4.3 QTIC Grants Gateway

The QTIC Grants Gateway provides a curated list of funding programs for prospective, new and existing tourism operators, community and not-for-profit organisations, and individuals.

Government agencies at federal, state and local level provide a wide variety of grant programs, but the majority of micro and small businesses do not have the time to examine what's available or know what to search for.

The QTIC Grants Gateway filters grant programs across Australia identifying those that are relevant for Queensland businesses and relate to the tourism and hospitality industry. It provides a 'quick look' at each program, allowing businesses to identify whether the grant is relevant.

This service is provided free to QTIC members or to non-members through annual subscription. QTIC raises awareness of grants programs to industry through our various communication channels including newsletter and social media channels.

On the horizon:

- QTIC will continue to provide the QTIC Grants Gateway as a valuable service to our members and where appropriate will assist and support our members in preparing grant applications.
- Raising the awareness of grant programs to key industry stakeholders and industry operators continues to be important.

4. Response to terms of reference

4.1 Response to: 'Domestic and international tourism comprising: recreational, environmental, cultural, educational, and industrial tourism'

4.1.1 Visitor Market Analysis

In the year ending September 2016, the North Queensland group of tourism regions – including Tropical North Queensland, Townsville, The Whitsundays, Mackay, Southern Great Barrier Reef (including Capricorn region) and the Outback Queensland region – hosted 8.1 million overnight visitors, a total of 41.3 million visitor nights, earning \$6.5 billion in overnight visitor expenditure. A breakdown of the purpose of travel for the domestic and international markets is shown below in Table 2.

Table 2: Visitation to Northern Queensland (visitors, nights, overnight visitor expenditure)

			Year ending Sep16	% change YoY
Total stopover reason	NVS	Overnight visitors	6,706,000	25.7%
		Visitor nights	28,611,000	-4.6%
		OVE (\$m)	5,055	12.7%
	IVS	Overnight visitors	1,427,000	29.3%
		Visitor nights	12,637,000	9.9%
		OVE (\$m)	1,400	37.4%
Holiday	NVS	Overnight visitors	2,586,000	53.3%
		Visitor nights	12,085,000	75.7%
	IVS	Overnight visitors	1,282,000	45.3%
		Visitor nights	8,222,000	27.3%
VFR	NVS	Overnight visitors	1,711,000	67.9%
		Visitor nights	6,512,000	12.7%
	IVS	Overnight visitors	80,000	-22.7%
		Visitor nights	1,853,000	-14.7%
Business	NVS	Overnight visitors	1,916,000	-29.5%
		Visitor nights	8,087,000	-7.8%
	IVS	Overnight visitors	21,000	-7.2%
		Visitor nights	189,000	0.8%
Education	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Other	NVS	Overnight visitors	558,000	28.1%
		Visitor nights	1,863,000	-28.0%
	IVS	Overnight visitors	26,000	-8.5%
		Visitor nights	815,000	-88.2%

Source: Tourism Research Australia, National and International Visitor Surveys, year ending September 2016. Notes: OVE = Overnight visitor expenditure. "n/p" = not publishable due to low sample size. Total Northern Queensland is the sum of 6 Northern Queensland tourism regions (Tropical North Queensland, Townsville, The Whitsundays, Mackay, Southern Great Barrier Reef and Outback Queensland); boundaries do not sit along the Tropic of Capricorn and are used for indicative purposes only.

>> Visitor market analysis for each of the six Northern Queensland tourism regions, supplied by Tourism and Events Queensland, are provided in Appendices 2 through to 6.

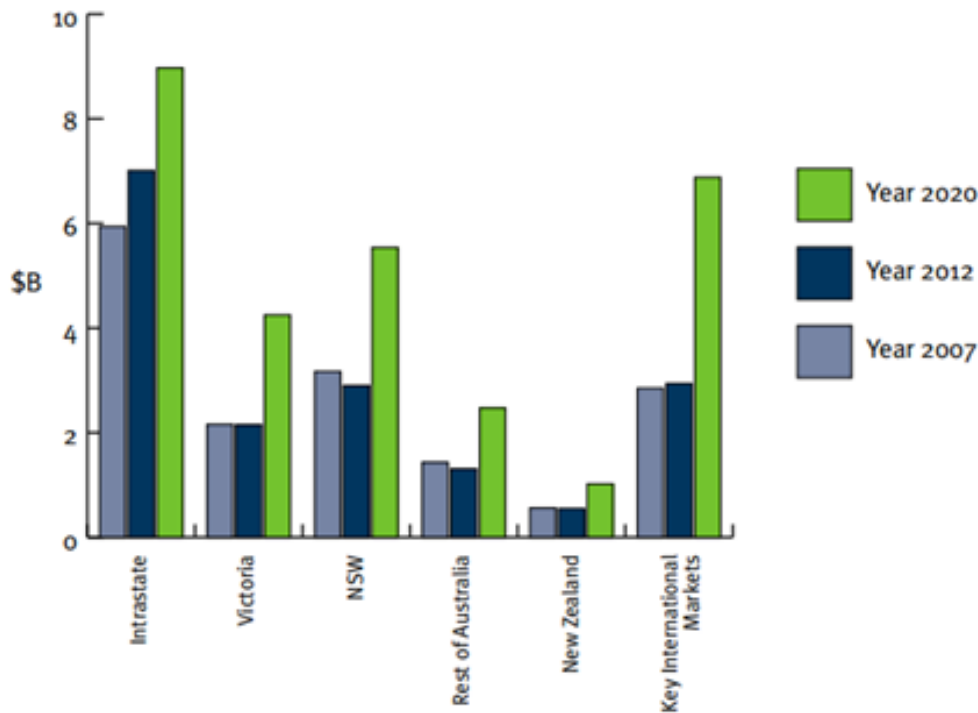
Top image: Cooya Beach, near mossman in Tropical North Queensland. Copyright TEQ

4.1.2 Visitor Market Projections

Tourism and Events Queensland forecast the growth in overnight visitor expenditure in Queensland to be generated from key international markets, however the domestic market is also expected to generate strong growth to 2020.

Figure 1: Key Markets to Queensland – by overnight visitor expenditure

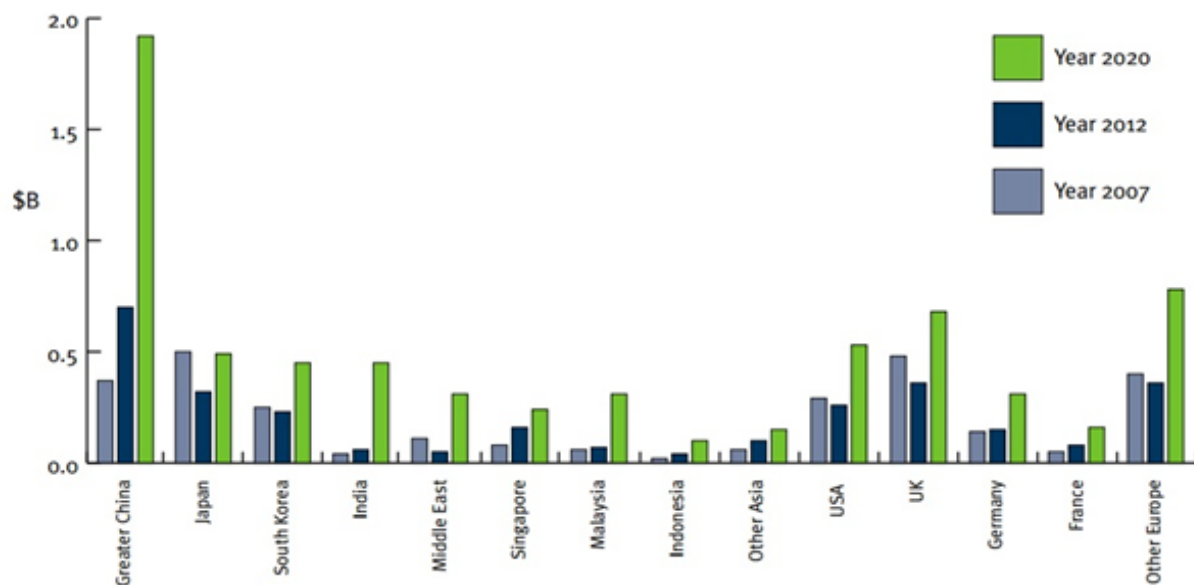
Source: Tourism and Events Queensland, 2020 Strategic Marketing Plan



Of the Key international markets to Queensland, Greater China is forecasted to deliver the most growth in overnight visitor expenditure.

Figure 2: Key International Markets to Queensland – by overnight visitor expenditure

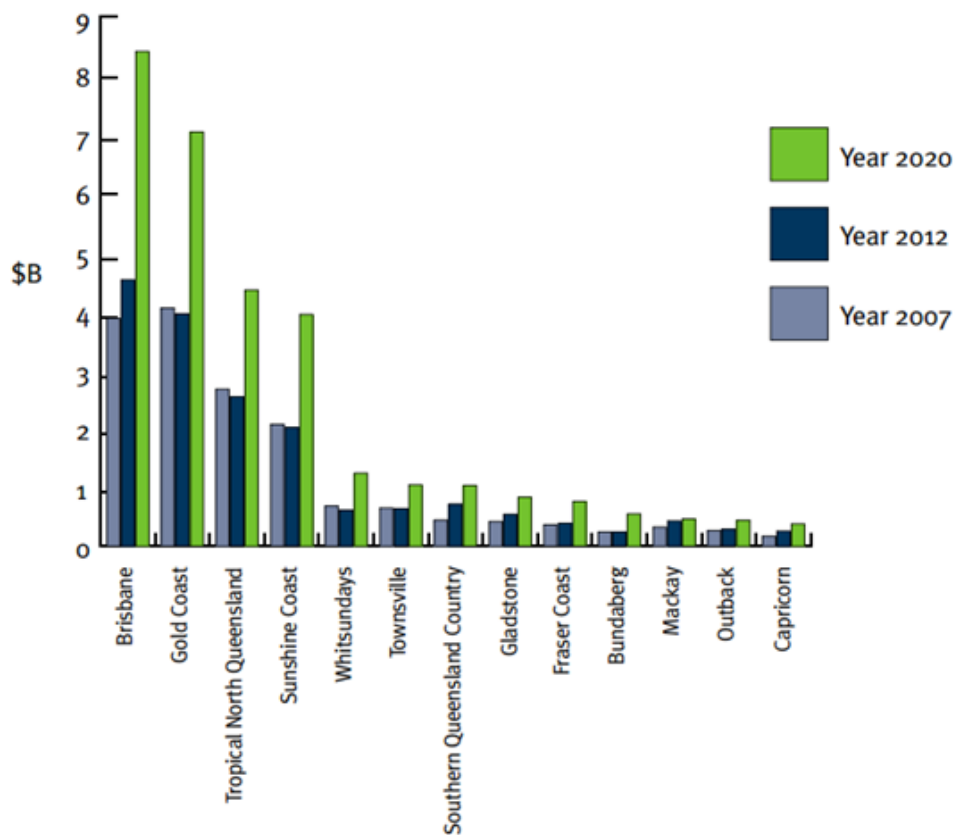
Source: Tourism and Events Queensland, 2020 Strategic Marketing Plan



4.1.2 Visitor Market Projections cont...

Figure X: Overnight visitor expenditure estimates by tourism region

Source: Tourism and Events Queensland, 2020 Strategic Marketing Plan





4.2 Response to: ‘The role of peak bodies, local communities, and all levels of government in developing and promoting tourism opportunities nationally and internationally, including regulations and workforce issues that may inhibit tourism development’

4.2.1 Stakeholder roles

a) Industry Associations and Organisations

The Queensland Tourism Industry Council is the peak industry body for tourism in Queensland. QTIC works in partnership with government agencies and industry bodies at a local, state and national level and is a member of the Australian Chamber of Commerce and Industry and the Australian Tourism Industry Council (ATIC).

QTIC is well positioned to recommend and connect appropriate committees and networks to discuss issues concerning the development of tourism in Northern Australia. Tourism sector associations and networks, facilitated via QTIC, include:

- Queensland Regional Tourism Organisations Network, including 13 regional tourism organisations across Queensland supported by QTIC and Tourism and Events Queensland;
- QTIC Associations Council, including 18 sector associations involved in the Queensland tourism industry; and
- QTIC Drive Alliance, including sector associations, regional tourism organisations, highway committees, and major drive tourism organisations, to progress the drive market in Queensland.

Independent business and industry groups, such as the Northern Australia Alliance, will also play an important role in the coordination of priority projects and the implementation of programs.



b) Federal Government

The Australian Government will no doubt play a lead role in not only the development of tourism in Northern Australia but also the coordination for all types of development in the region. Clearly outlined clarity of purpose and clarity of responsibility for any agenda in Northern Australia must be outlined for any action to be effectively coordinated, resourced and implemented. This coordination should be the role and responsibility of the Office of Northern Australia, with cross-portfolio synergies.

Greater cooperation between the Federal Government and the respective state/territory governments of Northern Australia (Queensland, Western Australia and the Northern Territory) will also ensure that critical infrastructure projects in the north are prioritised at all levels of government and approved in a timely manner. However, government alone cannot achieve the ambitions for tourism development and economic growth in Northern Australia. The key role for all levels of government must be to deliver the required infrastructure and investment environment.

Government must work with industry to identify opportunities to support businesses to invest, promote and drive the future growth of Northern Australia.

A major impediment will be the cost of investing and operating in the north. Existing funding channels must be sustainable and adaptive to be applicable to meeting the opportunities in Northern Australia. Further, 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.

QTIC endorses the following priorities identified by the Australian Chamber of Commerce and Industry:

"Driving down the costs of operating in the north and making it more attractive for investors and workers is key to realising the vision. Businesses tell us the top three factors they consider when contemplating expanding to regional Australia are workforce, telecommunications and roads."

"We need better cooperation between the Federal Government and the governments of Queensland, Western Australia and the Northern Territory. We also need cooperation with business and local communities, including Indigenous communities. A good start is simplifying land arrangements to boost investment, such as more efficient native title processes and better use of pastoral land."

"Lack of access to water is a major constraint on economic growth in Northern Australia, and building dams to strengthen irrigation and agricultural production is key to the solution. We must not allow ideological opposition to dams to hold back development. Northern Australia's rainfall is almost double that of the Murray-Darling Basin, but much of it flows unused into the sea from highly seasonal rivers."

"The \$600 million Northern Australia roads package will make it easier to move people and freight all year round. The Government should focus on roads identified by Infrastructure Australia as adding to road network connectivity and capacity."

"The \$75 million Co-operative Research Centre for Developing Northern Australia will focus on agriculture, food and tropical medicine, allowing business and government to work together to realise the vision outlined in the White Paper." - AUSTRALIAN CHAMBER OF COMMERCE AND INDUSTRY

Source: Australian Chamber of Commerce and Industry, Media Release: Business welcomes plan to unlock Northern Australia's economic potential, 18 June 2015.

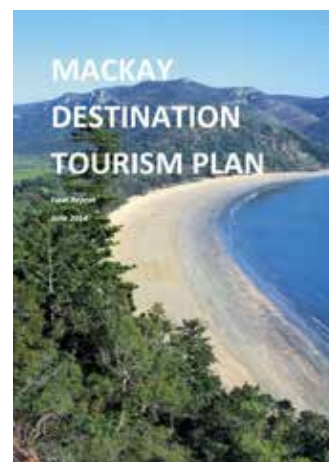
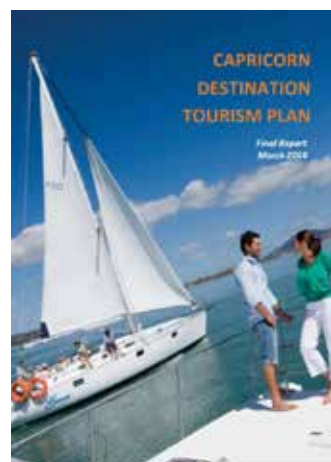
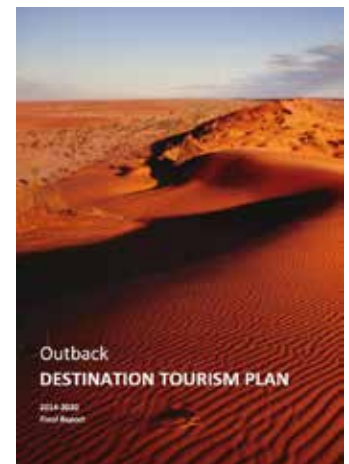
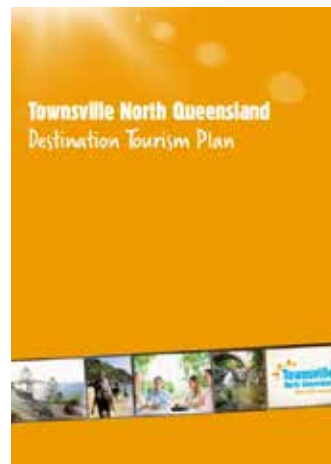
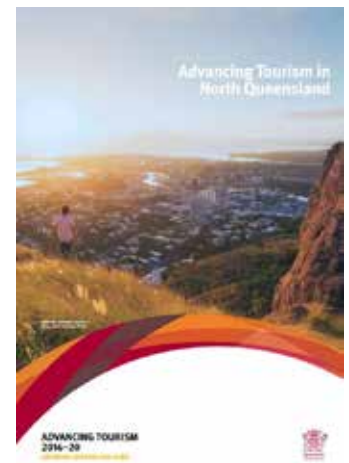
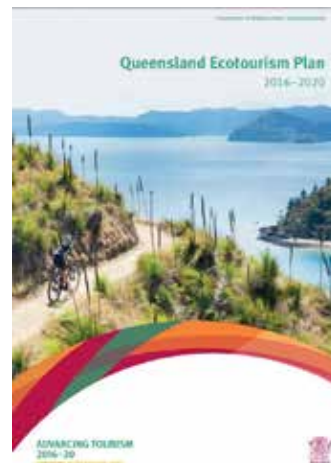
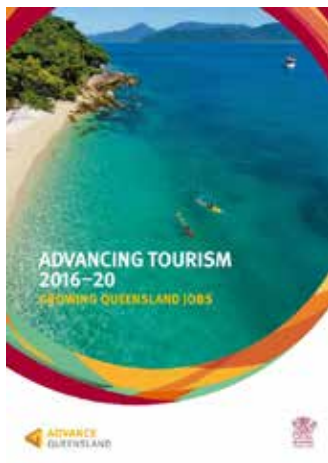
Top image: Bowen, Whitsundays. Photographer Gareth McGuigan. Copyright TEQ

c) State Government

QTIC remains committed to working with the Queensland Government and industry to achieve industry development outcomes through the newly released state tourism strategy, *Advancing Tourism 2016-20*, and the four strategic directions:

- *grow quality products, events and experiences;*
- *invest in infrastructure and access;*
- *build a skilled workforce and business capabilities; and*
- *seize the opportunity in Asia.*

An industry commitment to the Advancing Queensland strategic directions forms the foundation of our response to this inquiry.



Tourism and Event Queensland (TEQ) has developed the new state tourism campaign on unique experiences. Many of the strategic priority outlines by TEQ are relevant for the Queensland part of Northern Australia. These Strategic Priorities are shown below in Box 4.

Box 4: Tourism and Events Queensland – strategic priorities:

Deliver and promote a world-class events calendar

- Maintain an events calendar that is a high value sustainable asset for Queensland
- Attract and secure major events to grow the Queensland economy and support jobs
- Support regional Queensland through the Queensland Destination Events Program
- Support the Queensland business events sector through the Business Events Program
- Event value optimisation, including maximising opportunities for tourism leading up to the 2018 Commonwealth Games

Market the best address on earth

- Clearly articulate Queensland's global target markets to maintain and grow share of expenditure
- Identify and showcase Queensland's experiences to create competitive advantage
- Inspire a global target audience to consider Queensland
- Ensure a focus on Signature Products and Events that deliver exceptional, quality experiences
- Maximise visitation and expenditure across Queensland's suite of destinations

Focus on Asia

- Implement our Asia Strategy for Queensland
- Target priority Asian markets and accelerate efforts to win share and grow aviation access
- Develop key partnerships with relevant trade including online travel agents

Aviation access and strategic partnerships

- Increase focus on attracting and supporting aviation access
- Identify and increase partnerships with trade, government and other stakeholders
- Derive tourism benefits from the international education market

Destination and experience development

- Support Regional Tourism Organisations (RTOs) through Tourism Network Funding
- Foster quality and innovation in the industry in collaboration with QTIC
- Showcase world class experiences in Queensland's destinations
- Work in partnership with RTOs to support the delivery of each region's Destination Tourism Plan including Signature Experiences

Source: 2016-20 Tourism and Events Queensland Strategic Plan

Underpinning the strategic priorities for Tourism and Events Queensland is the *Experiences Framework* (shown on page 21) delivering Hero Experiences and targeted marketing focused on Queensland's competitive advantages.

Recommendation

- Foster focused coordination between Tourism Australia and state and regional tourism organisations in the branding and marketing efforts for Northern Australia destinations to international target markets.



Experience Pillars



Reef, Islands, Beaches



Natural Encounters



Adventure and Discovery



Queensland Lifestyle



Events

Hero Experiences

Each Experience Pillar has a suite of Hero Experiences that reflect what is unique and memorable about Queensland and provides our competitive advantage.

- Great Barrier Reef
- Islands
- Beaches
- Diving and Snorkelling
- Sailing

- Natural Landscapes
- Wildlife Experiences
- Marine Life Experiences

- Adventure Experiences
- Dinosaurs and Fossicking
- Indigenous Experiences
- Theme Parks
- Journeys

- Food and Beverage
- Outback and Country Life
- Local Characters
- City Experiences

- State of Endurance
- Food and Beverage
- Home of Country Music
- Music City, Brisbane
- Brisbane's Cultural and Creative Precincts
- Blockbuster Sport
- Outback Events
- Indigenous Events

Signature Experiences Program

The Signature Experiences Program will identify the best of the best tourism products, events and locations that deliver Queensland's Hero Experiences



d) Local Government

Local government support of regional tourism organisations is critical, both fiscally and in the coordination of tourism development and promotion initiatives.

QTIC is committed to supporting local governments in the advice on tourism development needs and opportunities in Queensland.

Tourism promotion

Tourism and Events Queensland supports the regional tourism organisation approach to structuring the promotion of tourism regions across Queensland. QTIC also supports the role of the regional tourism organisations in Queensland and strongly encourages all levels of government to engage with the network in promoting regional tourism in Queensland.

Tourism planning

Local planning schemes must support sustainable tourism and facilitate private investment. Development application processes must be flexible and supportive of innovative tourism development proposals in order to achieve unique product offerings and position Northern Australia destinations competitively. The Queensland Government's *Next Generation Tourism Planning* guideline publication is a useful resource for local government planners in Queensland for reviewing tourism planning development proposals ⁸.

Recommendation

- Promote local government engagement with and support of with regional tourism networks, in the development and promotion of regional tourism with a focus on local needs and opportunities.

“In Northern Australia, Councils are an integral partner in the development and promotion of tourism. Accredited Visitor Information Centres in Outback Queensland are run by Councils who employ both staff and volunteers to deliver this service to travellers. Councils are also responsible for road maintenance in their Shire and provide financial and in kind support for both major and community events in their region.” -OUTBACK QUEENSLAND TOURISM ASSOCIATION

⁸ Queensland Government, *Next Generation Tourism Planning – a guideline for planners in Queensland*, 2013.



4.2.2 Tourism Development Opportunities

Investment in public infrastructure and amenities which supports private investment in tourism development is critical.

Innovation and better informed decision-making for transport infrastructure investments can be achieved by ensuring the consideration of all users of public infrastructure, including the vast quantity of visitors to Queensland.

This will require a coordinated approach. A clear goal of any tourism planning and development opportunities study must be to inspire business development and growth, with coordination across community, industry and government. The facilitation of innovative and sustainable tourism enterprise opportunities must be supported by tourism planning and development opportunities studies in tourism regions. In many areas of Northern Queensland, tourism opportunity plans have already been prepared and outline appropriate use and development and market competitive opportunities prime for investment.

For a coordinated approach, infrastructure and policies for tourism, support and investment in actions outlined in existing destination tourism plans can optimise the potential of tourism in Northern Australia.

It is strongly recommended that, as part of this Inquiry, the full suite of existing strategic plans for tourism in Northern Queensland is consulted, including those of the Queensland Government as well as Destination Plans prepared for each of Queensland's tourism regions.

Recommendations

- Consult all strategic plans relevant to all users of public infrastructure, including state tourism strategies and regional tourism destination plans.
- Work within the directions of existing tourism opportunity plans to direct the development of tourism in Northern Australia.
- Assist local tourism regions to develop destination management and opportunity plans where they do not yet exist.

To develop a thriving, market competitive and sustainable tourism economy, every part of the tourism industry must cater to evolving consumer needs, desires and expectations.

Recommendation

- Invest in and supporting the development of innovative solutions for the built environment, businesses, products and people must be an ongoing objective for tourism in Northern Australia.

Unlocking of land appropriate for sustainable tourism development will present the geographic diversity of Northern Australia to visitors and strengthen and diversify the tourism industry by creating more destinations and experiences for visitors to extend their stay in Australia.

This must also include protected areas. Protected areas such as national parks are places for community enjoyment, sustainable recreation and tourism use. Such sustainable use must be clearly identified as a basis for innovative management solutions, resourcing and community benefit. Both private participation and local government contributions through the development of sustainable tourism experiences and enterprises have, in many regions of Queensland and Australia, worked in harmony with conservation objectives and delivered intended environmental policy outcomes for protected areas.

Recommendation

- Support greater tourism access and enterprise opportunities in Northern Australia by unlocking opportunities, including in protected areas such as National Parks, for sustainable tourism use and development.

“Many of Northern Australia’s most spectacular attractions are in National parks. Typically, these are not well marketed, and often visitor infrastructure is limited. Modest investment in these parks and the better integration of their marketing into broader State and Territory marketing initiatives will showcase these attractions... Ecotourism development can be facilitated by the development and maintenance of state visitor infrastructure on National Parks in a structured way that creates touring corridors and nodes while providing access to attractive sites.” -TOURISM TROPICAL NORTH QUEENSLAND

Tourism has a vested interest to preserve and protect not only the natural assets and cultural heritage of our state, but also support for Aboriginal and Torres Strait Islander people through tourism activities.

Northern Australia offers, and has further development opportunities for, unique and highly sought after cultural tourism experiences which will increase the destination competitiveness of Australia.

4.2.2 Tourism Development Opportunities cont...

An investment in local cultural capital, including arts and cultural services, attractions and infrastructure, is not only also essential for creating and maintaining a sense of place and enhancing liveability, but can drive further innovation and local entrepreneurship in the tourism sector. Furthermore, infrastructure investment in short term opportunities, such as major events, must be planned to deliver legacy outcomes with long term economic and social capital growth opportunities.

Queensland's tourism industry will benefit from the improved liveability, tourism attractiveness and long term opportunities that cultural tourism investment will bring.

Recommendation

- Support and investigate the development of cultural tourism opportunities in Northern Australia.

Box 5: Unlocking tourism potential in the Torres Strait Islands

The Torres Strait Islands offers unique, geographical, historical and cultural offerings for tourism - a genuine frontier. Unexplored opportunities for tourism are perfectly placed on the door step of the thriving Asia and Indonesian markets.



Accommodation

Facilitation of the development of a range of accommodation types is critical to attracting a broad visitor market (including education, business and luxury markets) and in reducing seasonality of the tourism economy.

A review of the accommodation options available to visitors, and encouraging local resident involvement in the growth of the tourism industry, may create new opportunities such as the organisation and commercialisation of existing private housing which have unoccupied periods (such as properties used as timeshare and holiday homes) or the use of camping sites for other purposes outside of peak tourism periods.

Recommendation

- Support the facilitation of innovative, high-quality and sustainable accommodation development outcomes for Northern Australia that will appeal to a broader visitor market.

Events

Events encapsulate regional and local characteristics and create significant economic development opportunities in regional locations. The Queensland tourism and events industry, in partnership with Tourism and Events Queensland, regional tourism organisations and local governments, have delivered world-class, award-winning events in the northern regions. Ongoing support for the development and growth of regional events is critical to stimulating tourism in Northern Australia.

Recommendation

- Investigate the development and growth of events opportunities in Northern Queensland locations, with appropriate funding and support.

Box 6: Mt Isa Mines Rotary Rodeo

“The Mount Isa Mines Rotary Rodeo is where the romance of the Australian Outback meets the grit of a mining town, east meets west and man meets beast. Non-stop rodeo action - bull riding, saddle bronc, bareback bronc, rope & tie, steer wrestling, team roping, barrel racing, breakaway roping” - WWW.ISARODEO.COM.AU



Information and Services

Well-planned and delivered visitor information will support positive visitor experiences of Northern Australia. To provide a high-quality and world-class visitor service experience, delivery needs to meet all needs of the visitor market. Visitor information services must be considered a multi-modal program. The experience of a destination begins prior to travel, such as by engaging in digital marketing campaigns and social media channels. When in destination, visitor interaction with local resident destination ambassadors, visitor information centres, and signage are highly influential and need to be considered when investing in a visitor information services program.



“We require interpretive signs in major foreign languages including Mandarin and Cantonese to guide and assist international tourism.” - OUTBACK QUEENSLAND TOURISM ASSOCIATION



Recommendation

- Invest in visitor information signage and the consideration for ongoing investment in a world-class visitor information service program.

Visitor Research Program

QTIC encourages the investment in market research programs and partnerships with existing destination marketing and management institutions, including sharing data to benefit from market profiling analysis. Sharing insights with the local tourism industry will also help business owners and customer service staff to meet service and quality expectations.



There is a “lack of accurate and beneficial tourism data and analysis for Northern Australia” – TOWNSVILLE ENTERPRISE

“A digital data collection methodology, supported by stakeholders across Northern Australia would support informed decision making around a wide range of development and marketing issues.” – TOURISM TROPICAL NORTH QUEENSLAND



Recommendation

- Invest in a visitor research program in Northern Australia.



Regional Tourism Development Opportunities

a) Tropical North Queensland Tourism Region

QTIC supports Tropical North Queensland Tourism Region's submission to this Inquiry into Opportunities and Methods for Stimulating the Tourism Industry in Northern Australia, particularly the following priorities for tourism development:

- Citizens of the Great Barrier Reef: Federal Government community service advertising and a community engagement strategy to encourage every Australian to become a Citizen of the Great Barrier Reef.
- Supporting the growth of the Cruise market into Cairns.
- Supporting the growth of the business tourism market through the attraction of events and conferences.

b) Townsville Tourism Region

QTIC supports Townsville Enterprise's submission to this Inquiry into Opportunities and Methods for Stimulating the Tourism Industry in Northern Australia, particularly the following priorities for tourism development:

- Implementation of the Townsville City Deal projects for growing tourism.
- Townsville Convention and Entertainment Centre.
- Reef HQ Aquarium.
- Reef Research Platform.
- Supporting the growth of the cruise market into Townsville.

Box 7: Townsville City Deal

The Australian Government, Queensland Government and Townsville City Council signed Australia's first City Deal for Townsville on 9 December 2016.

The Townsville City Deal will focus on improving the lives of Townsville residents through job creation, economic growth, investment in local infrastructure, a revitalised urban centre, and a more vibrant and liveable city.

The City Deal is a 15 year commitment between the three levels of government to work together to deliver transformative outcomes for Townsville and its residents. The Deal was developed in collaboration with the Townsville community and private sector.

Tourism is a key focus in this document and this roadmap should provide a pathway to align the three levels of Government with industry on a shared vision for the sector.



c) Whitsunday Tourism Region

QTIC supports our tourism partners in the Whitsunday region in the identification of the following tourism development priorities:

- Expansion of the boardwalks, lookouts and beach access in the Whitsundays region.
- Investigation of alternative locations to develop visitor infrastructure for anchorages, walks and viewing platforms.
- Expansion of the Reef Protection Program through the installation of an additional 50 Moorings and 100 Reef Protection Markers to create Coral Appreciation Zones.

d) Mackay Tourism Region

QTIC supports our tourism partners in the Mackay region in the identification of the following tourism development priorities:

- Development of nature-based tourism products, including Cape Hillsborough as a Hero Experience
- Expansion of access and opportunities for tourism product upgrades on the region's islands, including Brampton Island, Keswick Island and the Lindeman Islands.
- Enhancement of nature-based tourism experience with signage and interpretation
- Growth of the RV and camping market and the fishing market.

e) Capricorn Tourism Region

QTIC supports Capricorn Enterprise's submission to this Inquiry into Opportunities and Methods for Stimulating the Tourism Industry in Northern Australia, particularly the following priorities for tourism development:

- Convention Centre and Stadium facilities.
- Supporting the development of new tourism resorts in the region.
- Enhancement of digital infrastructure to support tourism development.



f) Outback Queensland Tourism Region

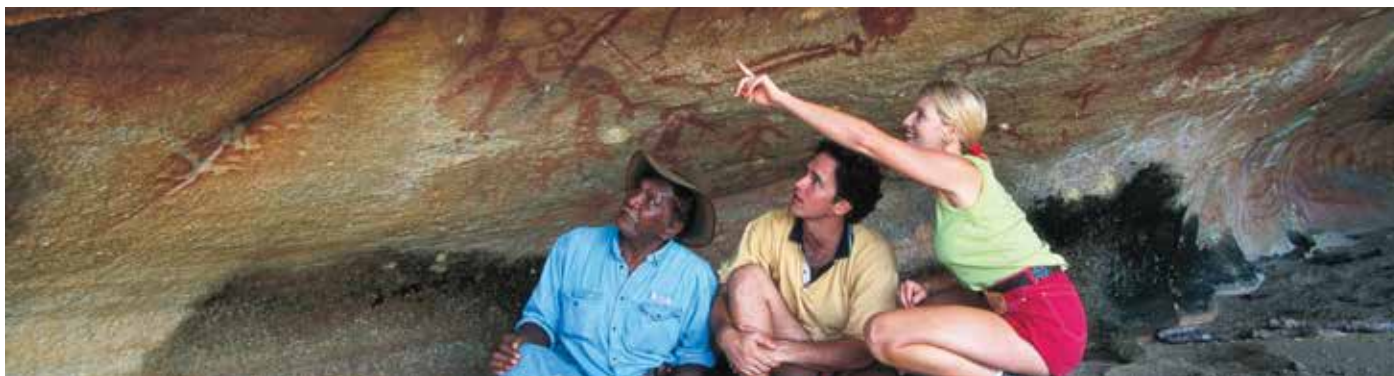
QTIC supports Outback Queensland Tourism Association's submission to this Inquiry into Opportunities and Methods for Stimulating the Tourism Industry in Northern Australia, particularly the following priorities for tourism development:

- Sealed roads across the outback region.
- Supporting the development of Indigenous tourism experiences.
- Development of the education tourism market, and supporting accommodation, facilities and experiences.
- Development of the industrial tourism market, and supporting infrastructure and amenities.
- Development of event facilities across the region.
- Enhancement of digital infrastructure to support tourism enterprise development.



"Roads leading to Lark Quarry and the Age of Dinosaurs near Winton for example, become inaccessible when it rains causing significant issues for those travelling with caravans who become stuck at their current location or bogged when they try and get out, which in turn cuts up the access road and causes damage that needs be fixed for the safety of other travellers. There are many locations right throughout Outback Queensland who face these same access issues." -OUTBACK QUEENSLAND TOURISM ASSOCIATION





4.2.3 Tourism Workforce Development

Education and industry training will support the development and delivery of high quality tourism experiences in Northern Australia. Strengthening partnerships between industry and the education and training sector is needed to ensure training and skills programs are world class and contemporary.

Recommendation

- Continue to support labour market programs for the upskilling of workers and the promotion of transferrable skills that will help to meet future demand in tourism and service industries.

QTIC recognise the importance of both formal and informal training opportunities, creating flexible training and curriculum packages that will provide ‘top-up’ skills to assist in creating long-term careers in the tourism industry.

A key focus for QTIC is the promotion of tourism as an aspirational career, working with training providers, students and industry to showcase the industry as a long-term opportunity.

Recommendation

- In association with education institutions (VET and higher education), continue to support the promotion of tourism as a long-term aspirational career, via adequate training funding (equitable access to student loans for students in tourism programs), entrepreneurial programs and training packages.

The development of new training products and industry specific curriculum in Northern Australia could be appropriate for developing a northern tourism workforce.

Recommendation

- Develop new education and training products in Northern Queensland, by targeting and partnering with existing educational institutions to develop specialised educational products unique to the region.

4.2.3 Tourism Workforce Development cont...

To be competitive, new facilities should offer a unique interpretation of the local culture and environment. The unique environment of Northern Queensland provides for a range of specialised educational and training products, such as in tourism and hospitality, natural resource management, environmental and marine sciences, or cultural studies. Creating educational programs to attract students to the northern regions has great potential to create long-term opportunities to attract return visits from former students with their families. To maximise the economic potential, education facilities and accommodation developed for this market must connect with existing transport, services and attractions. This would support the expansion of educational products into offerings such as school camps, field studies and tertiary research in Northern Queensland. The international education market could also be an additional method for meeting labour shortage in the northern regions.

Recommendation

- **A continued focus on building international education through the regional northern Australia universities and training providers, supported by seamless visa processing and streamlined application process for priority occupations.**

Investment in catalytic infrastructure, such as the development of the Townville Stadium, the Aquarium at Cairns, the proposed reef casino (Aquis) development, plus many other large-scale tourism developments in the pipeline across Queensland, will provide opportunities for new jobs and tourism workforce training.

Impediments and Challenges

- Skilled labour deficit across tourism and hospitality occupations, particularly in remote and frontier areas.
- Tourism seasonality, a challenge for training and retaining staff.
- Tourism not seen as providing career path opportunities worth upskilling for.

Queensland Tourism Industry Council's stakeholder role

QTIC is well-positioned to assist in facilitating these opportunities, as an active member of several education and training committees including:

- The Jobs Queensland board (an independent statutory entity providing strategic industry advice to government on skills demand and future workforce planning);
- Chair of the Tourism Jobs Plan, for ensuring a stable workforce into the future; and
- The National Industry Roundtable on Employment, Education and Training (ACCI);

In 2000 QTIC was appointed as the Industry Advisor Body for VET education in Queensland. QTIC has continued a strong engagement with industry and government to ensure the needs of industry are delivered through VET education programs:

- Representing the Tourism and Hospitality industry in the management, investment and planning of vocational education and training;
- Providing advice in respect of, and participate in, the development of training products and services that meet the specific needs of the tourism and hospitality industry, both nationally and regionally;
- Providing advice to the State Government on where training dollars can best be spent in the tourism, hospitality and events programs.



4.2.4 Business Capacity Building

The challenge for tourism enterprise development in Northern Australia will be how to create a favourable environment for business and develop an innovative and dynamic business culture. Government must continue to work collaboratively with industry to build fundamental capability and capacity for the tourism industry in Northern Australia.

Recommendation

- **Work with industry to deliver training and support programs to build local business capacity.**

QTIC encourages the ongoing delivery of training and support programs for improving the skills and capabilities for tourism businesses in Northern Australia. For maximum benefit, it is recommended that any new training and support programs link with and provide access to existing business programs and work in collaboration with industry bodies, including the Queensland Tourism Industry Council, existing regional tourism organisation networks, Tourism and Events Queensland, and the Chamber of Commerce and Industry Queensland.



4.3 Response to: ‘Communication and transport infrastructure (particularly air, sea, road and rail transport and port infrastructure) which may facilitate and grow tourism’

Communications

Communications infrastructure is a priority concern for the development of tourism in Northern Australia. Stable, fast mobile and data communication services is critical for business enterprise development and for the safety and experience of travellers.

“Restricted communication networks have an impact on the safety of remote area travellers. Travellers simply expect full mobile and data coverage throughout Australia.”
– OUTBACK QUEENSLAND TOURISM ASSOCIATION

“Northern Australia, particularly regional and remote locations face significant disadvantages in terms of poor digital connectivity. This negatively impacts on business ability to remain globally competitive; it significantly impairs liveability and amplifies risks to residents and visitors due to a lack of real time information on road closures and alternate routes... Tourism marketing increasingly focuses on digital platforms but these are not available in most of Northern Australia and far fewer tourists share their experiences on digital media because of the lack of connectivity.” – TOURISM TROPICAL NORTH QUEENSLAND

Recommendation

- **Develop a communications infrastructure and digital enterprise support plan for Northern Australia.**

Transport

Creating a world class visitor experience greater connectivity, not only to and from the point of origin and Northern Australia but between destinations, will encourage visitors to extend the length of stay and spend more. It will also address affordability concerns and mobility barriers for visitors travelling without private vehicles.

Transport infrastructure which support efficient access to destinations has a direct and often immediate impact on visitation numbers and consumer demand.

Transportation infrastructure is a pressing concern facing tourism in all destinations. The needs and behaviours of visitors differ from those of residents, including their mobility and connectivity requirements and the amenity supporting popular tourism destinations. For tourism to achieve its potential in Northern Australia, the sector requires modern, comfortable and efficient transport infrastructure in place.

As a highly geographically diversified region, tourism in Northern Australia requires a 21st century air, sea, rail and road infrastructure system.

Recommendation

>> Collaboration with the Queensland Government in the delivery of the *Queensland Tourism and Transport Strategy* as relevant to Northern Queensland.

“From the moment a visitor starts planning a trip to Queensland, they expect a seamless and connected travel experience. The quality of their experience will depend in part upon Queensland’s vast and regionally dispersed transport system meeting their needs. Our visitors use a range of transport modes across their journey. Most international visitors arrive by air, many visitors rely on public transport and many visitors drive while here. Queensland also offers iconic rail journeys and is a cruise destination.
...Our efforts need to go beyond our recent successes in aviation and drive tourism to the entire transport system, linking people and places with an efficient and effective multi-modal transport system. Efficient, easily accessible and affordable transport provides opportunities for visitors, as well as locals, to experience more of Queensland’s destinations, attractions and events, increasing expenditure and creating jobs.” - QUEENSLAND GOVERNMENT

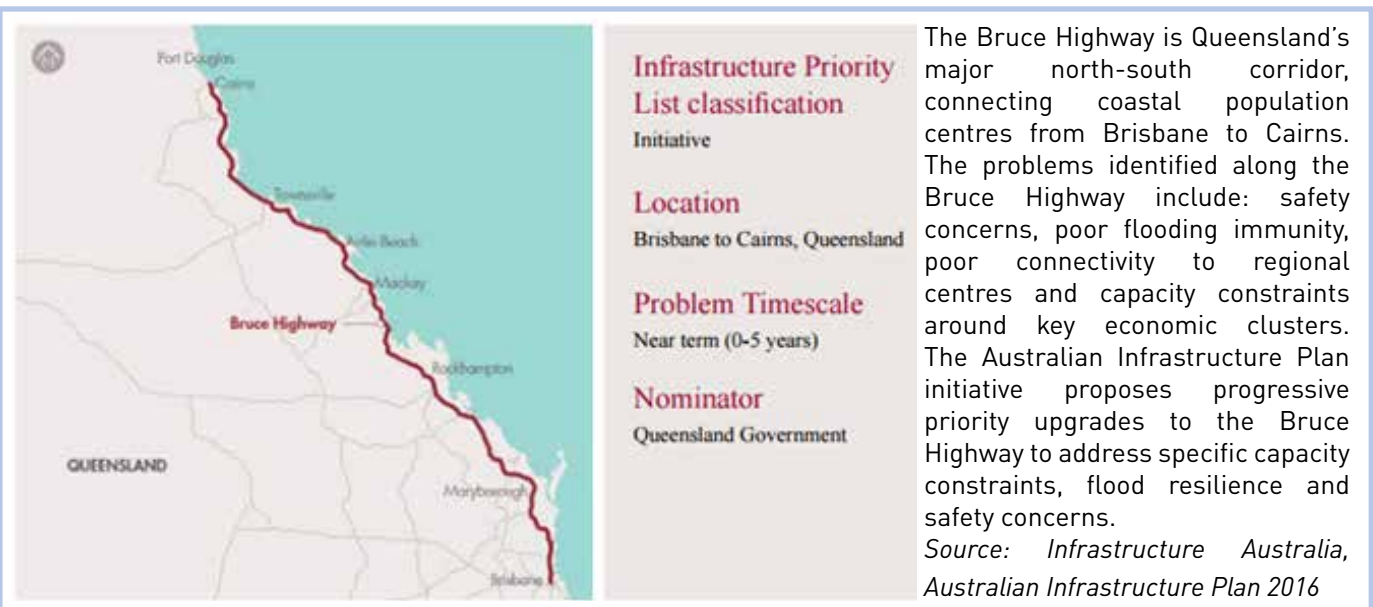
Recommendation

>> Develop an aviation plan for Northern Australia.

“Remote regional and remote locations have a heavy reliance on aviation access, whilst the small population bases impact on the ability to attract and retain affordable aviation services.” - TOURISM TROPICAL NORTH QUEENSLAND

The Australian Government’s *Australian Infrastructure Plan*, released February 2016, included priority infrastructure developments in Northern Australia that would contribute to the task of developing tourism across the region. One such priority affecting many tourism regions, is the Bruce Highway upgrade, shown in Box 9 below.

Box 9 - Bruce Highway Upgrade



The cruise shipping industry presents as an enormous opportunity to grow the tourism sector in Northern Australia, with port infrastructure across the region already servicing large cruise liners to Queensland. Enabling reliable port access to Northern Australia coastal destinations will support the growth of the leisure cruise industry.

Recommendation

>> Support the expansion of access for cruise ships into Northern Australia ports and islands whilst maintaining the health of marine assets such as the Great Barrier Reef.

QTIC Drive Alliance

The QTIC Drive Alliance was established as a Committee of the QTIC Board to act as a forum for discussion and advice to inform the development of the Queensland Drive Strategy 2013 – 2015 and also consider other issues related to drive tourism in Queensland, and continues to act as an industry forum to identify and provide feedback on drive tourism priority projects. The scope goes beyond transport infrastructure to include other road support infrastructure and facilities such as toilets, camping grounds, rest areas, directional and interpretive signage and waste management in remote areas.

Recommendation

>> Engage with the QTIC Drive Alliance on the identification of drive tourism priority projects in Queensland as part of the Northern Australia tourism development agenda.

The maintenance and growth of rail capacity in Northern Australia also presents opportunities for stimulating tourism in Northern Australia, particularly in accessing remote areas such as Outback Queensland.

Recommendation

>> Support the maintenance and growth of passenger rail experiences in Northern Australia.

Any infrastructure investment in Northern Australia must be resilient to the climate of the northern regions and be adaptive to the threats of climate change.

A key opportunity is to facilitate the development of sustainable infrastructure, which can position the Northern Queensland region as a centre of knowledge for sustainable and adaptive infrastructure in the sub-tropical and tropical environment.



“Remote communities are vulnerable to regular flood events, natural disasters causing road closures. Disaster funding can be used to fix the network however not to improve the network. Greater reliability on the transport system can increase the resilience of communities and year-round access to agriculture and tourism industries.”
- TOURISM TROPICAL NORTH QUEENSLAND



Recommendation

>> To ensure the resilience of tourism in Northern Australia, investigate and facilitate innovative sustainable infrastructure outcomes that are adaptive to the threats of climate change.



As we plan for the long term we must be cognizant of the impact of global warming. Innovative infrastructure that is adaptive to variations in climate, and can withstand extreme weather events, can position Queensland as a centre of knowledge for sustainable infrastructure in the sub-tropical and tropical environment. The facilitation of infrastructure that also accommodates multi-use demands can offer greater returns and benefits to our cities and regions.

As an industry that relies heavily on public infrastructure, tourism can offer an important perspective in discussions over the opportunities for sustainable infrastructure projects. Measures put in place now to extend the life of fundamental tourism and public infrastructure assets will greatly benefit Australia's economy both now and in the future.

Further enquiries

QTIC welcome the opportunity for further discussion regarding the points raised in this submission. For all enquiries, please contact Cherie Josephson on (07) 3236 1445 or email policy@qtic.com.au.

Appendices

Appendix item 1

Advancing Tourism in North Queensland

Castle Hill, Townsville, April 2016
Photo: Gareth McGuigan © TEQ

**ADVANCING TOURISM
2016–20**
GROWING QUEENSLAND JOBS



Advancing Tourism in North Queensland: building on strength and success

Tourism is a key driver of the North Queensland economy and region. Now, more than ever, North Queensland is positioned to build on its strengths and successes.

The region offers iconic and popular destinations such as the Great Barrier Reef and ancient World Heritage Area rainforests. These unique natural assets are complemented by a vibrant lifestyle and culture—there is truly something for everyone.

Millions of people visit North Queensland each year. Visitors to the Tropical North Queensland, Townsville, Mackay, Whitsunday and Capricorn regions spent in excess of \$4 billion in the year ending June 2016 supporting 220 000 jobs.

This dynamic region has an unprecedented opportunity to capitalise on its unique advantages and record visitation figures to grow market share and bolster sustainability.

North Queensland can attract more visitors and become a market leader by promoting its uniqueness and competitive advantages such as strong transport connections, close proximity to Asia and a safe, clean and green environment.

Advancing Tourism in North Queensland, in conjunction with *Advancing Tourism 2016–20: Growing Queensland jobs* and *Advancing North Queensland: Investing in the future of the north*, provides a suite of actions to support the continued growth of the tourism industry in this region.

We look forward to working together with industry to maximise North Queensland's tourism potential—growing jobs, attracting investment and sustaining communities.



Hon. Kate Jones MP
Minister for Education and
Minister for Tourism and Major Events



Hon. Coralee O'Rourke MP
Minister for Disability Services, Minister for Seniors and
Minister Assisting the Premier on North Queensland

Supporting tourism growth in North Queensland ...

- The Tourism Network Funding Program 2016–19 will support regional tourism organisations to promote their region, including the six regional tourism organisations operating across North Queensland.
- The \$180 million Significant Regional Infrastructure Projects Program and \$375 million Building our Regions Infrastructure Fund will help develop the:
 - new Great Barrier Reef moorings
 - nature tourism development at Mount Inkerman
 - new Mackay Visitor Information Centre
 - Mission Beach Aquatic Facility
 - Cooktown Airport Aviation Park
 - expansion of the Les Wilson Barramundi Discovery Centre.

Positioning North Queensland for growth

Advancing Tourism in North Queensland complements the government's Advance Queensland jobs and innovation agenda. A coordinated approach to industry, economic and regional development priorities will help position North Queensland to attract investment, infrastructure and jobs—now and into the future.

1. Grow quality products, events and experiences

The variety of North Queensland destinations and experiences has contributed to Queensland's reputation as a great tourism destination. By expanding the region's tourism offering to include more world-class, contemporary and unique products, and authentic local experiences, we can attract new and repeat visitors.

With industry we will:

- Continue to support major events in North Queensland.
- Explore and identify events for the new Townsville Stadium to increase visitors.
- Boost the tourism industry by committing \$100 million to improve water quality in the Great Barrier Reef.
- Leverage North Queensland's unique natural advantages to develop new ecotourism products.
- Work with North Queensland's premium tourism operators to undertake targeted marketing activity—matching products to identified market demand including Asia.
- Work with industry to improve tourism operators' digital capabilities.

2. Invest in infrastructure and access

Modern, high quality infrastructure is crucial to providing seamless travel to and around Queensland. Investing in new tourism assets, expanding access and improving infrastructure that supports North Queensland's unique requirements will drive growth in tourism jobs.

- Implement the Strategic Touring Route Signage Program across the five North Queensland touring routes.
- Leverage projects and opportunities arising from the proposed Townsville 'City Deal' to support and enhance tourism outcomes for North Queensland.
- Coordinate planning for tourism infrastructure and land uses through the development of the North Queensland regional plan and ongoing review of new local government planning schemes.
- Support the development of cruise and other tourism maritime infrastructure in North Queensland.
- Support the ongoing upgrade of key visitor infrastructure in protected areas on the Cape through the Cape York Visitor Strategy.
- Deliver a program of investor visitation to North Queensland in the lead-up to and during the Gold Coast 2018 Commonwealth Games.



Undara, TNQ-Tropical North QLD
Photo: Peter Lik © TEQ

3. Build a skilled workforce and business capabilities

Given the important role that tourism plays in the North Queensland economy, it is vital that industry has the skills and experience to meet the growing demands of visitors who are seeking high quality services and experiences.

- Encourage North Queensland tourism businesses to employ trainees through the Queensland Government's \$100 million Back to Work program.
- Through Jobs Queensland, work with North Queensland industry and communities on a workforce plan for the tourism industry to ensure we have the skills needed in the local economy.
- Build Indigenous business capability development through the Tropical Indigenous Tourism Project.
- Encourage tourism employment opportunities for young Indigenous people in North Queensland through the Youth Employment Program.
- Identify key economic drivers that will support tourism business and other industry development through the Townsville and North Queensland Pathfinder project.
- Support new edu-tourism opportunities through the \$25 million International Education and Training Strategy to Advance Queensland 2016-2026.

4. Seize the opportunity in Asia

The Asian tourism market is emerging as a major driver of economic growth, with more Asian travellers visiting Queensland than ever before—spending money and creating jobs across the regions. Now is the time to take a focused approach to position North Queensland as a leader in the Asian tourism market.

- Build stronger relationships between North Queensland cities and regions with emerging cities in Asia based on strategic potential, including aviation, education and trade.
- Leverage the \$33.5 million Connecting with Asia funding package and \$10 million Attracting Aviation Investment Fund to secure more direct flights between North Queensland and Asia.
- Work with key industry stakeholders to leverage opportunities for North Queensland arising from major events held in the region, such as the Cairns Ironman.
- Accelerate Asian market activity to maximise visitor numbers, expenditure, market share and aviation access, including facilitating greater regional dispersal within and to North Queensland.



Appendix item 2

Tropical North Queensland				
			Year ending Sep16	% change YoY
Total stopover reason	NVS	Overnight visitors	1,875,000	-7.3%
		Visitor nights	9,384,000	-4.4%
		OVE (\$m)	\$2,034.4	-3.4%
	IVS	Overnight visitors	877,000	16.0%
		Visitor nights	6,613,000	-4.1%
		OVE (\$m)	\$1,100.6	11.6%
Holiday	NVS	Overnight visitors	930,000	-12.4%
		Visitor nights	5,296,000	-6.5%
	IVS	Overnight visitors	815,000	16.9%
		Visitor nights	5,285,000	2.4%
VFR	NVS	Overnight visitors	414,000	3.5%
		Visitor nights	1,666,000	-16.0%
	IVS	Overnight visitors	38,000	8.6%
		Visitor nights	831,000	5.0%
Business	NVS	Overnight visitors	458,000	2.9%
		Visitor nights	2,058,000	43.8%
	IVS	Overnight visitors	16,000	-7.2%
		Visitor nights	101,000	0.8%
Education	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Other	NVS	Overnight visitors	97,000	-32.2%
		Visitor nights	365,000	-50.9%
	IVS	Overnight visitors	17,000	31.6%
		Visitor nights	236,000	-47.8%

Source: Tourism Research Australia, National and International Visitor Surveys, year ending September 2016.

Notes: OVE = Overnight visitor expenditure. "n/p" = not publishable due to low sample size.

Appendix item 3

Townsville				
			Year ending Sep16	% change YoY
Total stopover reason	NVS	Overnight visitors	1,131,000	11.2%
		Visitor nights	4,201,000	4.2%
		OVE (\$m)	\$844.7	8.3%
	IVS	Overnight visitors	125,000	2.1%
		Visitor nights	1,624,000	4.7%
		OVE (\$m)	\$90.6	4.1%
Holiday	NVS	Overnight visitors	351,000	18.2%
		Visitor nights	1,545,000	48.6%
	IVS	Overnight visitors	96,000	2.3%
		Visitor nights	493,000	2.3%
VFR	NVS	Overnight visitors	347,000	21.3%
		Visitor nights	1,323,000	11.1%
	IVS	Overnight visitors	18,000	-13.6%
		Visitor nights	423,000	-18.1%
Business	NVS	Overnight visitors	281,000	-7.9%
		Visitor nights	719,000	-43.3%
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Education	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Other	NVS	Overnight visitors	169,000	29.0%
		Visitor nights	614,000	15.2%
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p

Source: Tourism Research Australia, National and International Visitor Surveys, year ending September 2016.

Notes: OVE = Overnight visitor expenditure. "n/p" = not publishable due to low sample size.

Appendix item 4

The Whitsundays				
			Year ending Sep16	% change YoY
Total stopover reason	NVS	Overnight visitors	516,000	25.5%
		Visitor nights	2,199,000	-1.3%
		OVE (\$m)	\$517.1	1.9%
	IVS	Overnight visitors	229,000	9.6%
		Visitor nights	1,513,000	3.0%
		OVE (\$m)	\$209.2	21.7%
Holiday	NVS	Overnight visitors	336,000	19.1%
		Visitor nights	1,574,000	9.5%
	IVS	Overnight visitors	221,000	10.3%
		Visitor nights	1,217,000	11.1%
VFR	NVS	Overnight visitors	97,000	36.6%
		Visitor nights	409,000	15.9%
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Business	NVS	Overnight visitors	54,000	n/p
		Visitor nights	150,000	n/p
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Education	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Other	NVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p

Source: Tourism Research Australia, National and International Visitor Surveys, year ending September 2016.

Notes: OVE = Overnight visitor expenditure. "n/p" = not publishable due to low sample size.

Appendix item 5

Mackay				
			Year ending Sep16	% change YoY
Total stopover reason	NVS	Overnight visitors	733,000	-16.8%
		Visitor nights	2,767,000	-12.4%
		OVE (\$m)	\$322.8	-10.7%
	IVS	Overnight visitors	43,000	2.7%
		Visitor nights	461,000	35.0%
		OVE (\$m)	n/p	n/p
Holiday	NVS	Overnight visitors	157,000	-1.9%
		Visitor nights	423,000	3.4%
	IVS	Overnight visitors	31,000	9.3%
		Visitor nights	178,000	25.6%
VFR	NVS	Overnight visitors	158,000	-8.1%
		Visitor nights	636,000	0.8%
	IVS	Overnight visitors	6,000	-22.1%
		Visitor nights	153,000	-35.1%
Business	NVS	Overnight visitors	357,000	-27.0%
		Visitor nights	1,575,000	-20.3%
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Education	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Other	NVS	Overnight visitors	68,000	13.3%
		Visitor nights	133,000	-7.0%
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p

Source: Tourism Research Australia, National and International Visitor Surveys, year ending September 2016.

Notes: OVE = Overnight visitor expenditure. "n/p" = not publishable due to low sample size.

Appendix item 6

Southern Great Barrier Reef				
			Year ending Sep16	% change YoY
Total stopover reason	NVS	Overnight visitors	1,932,000	-0.3%
		Visitor nights	7,739,000	-0.1%
		OVE (\$m)	\$1,022.0	7.2%
	IVS	Overnight visitors	133,000	-6.3%
		Visitor nights	2,209,000	-16.8%
		OVE (\$m)	n/p	n/p
Holiday	NVS	Overnight visitors	585,000	2.6%
		Visitor nights	2,302,000	-1.1%
	IVS	Overnight visitors	103,000	-3.9%
		Visitor nights	1,049,000	-14.1%
VFR	NVS	Overnight visitors	583,000	-3.6%
		Visitor nights	2,075,000	-10.3%
	IVS	Overnight visitors	18,000	4.4%
		Visitor nights	446,000	33.5%
Business	NVS	Overnight visitors	627,000	-3.2%
		Visitor nights	2,931,000	7.4%
	IVS	Overnight visitors	5,000	n/p
		Visitor nights	88,000	n/p
Education	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Other	NVS	Overnight visitors	160,000	11.1%
		Visitor nights	432,000	14.3%
	IVS	Overnight visitors	9,000	-40.1%
		Visitor nights	579,000	-40.4%

Source: Tourism Research Australia, National and International Visitor Surveys, year ending September 2016.

Notes: OVE = Overnight visitor expenditure. "n/p" = not publishable due to low sample size.

Appendix item 7

Outback Queensland				
			Year ending Sep16	% change YoY
Total stopover reason	NVS	Overnight visitors	519,000	13.4%
		Visitor nights	2,321,000	9.5%
		OVE (\$m)	\$314.1	9.5%
	IVS	Overnight visitors	20,000	5.2%
		Visitor nights	217,000	-11.9%
		OVE (\$m)	n/p	np
Holiday	NVS	Overnight visitors	227,000	27.6%
		Visitor nights	945,000	21.7%
	IVS	Overnight visitors	16,000	10.4%
		Visitor nights	n/p	n/p
VFR	NVS	Overnight visitors	112,000	18.2%
		Visitor nights	403,000	11.3%
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Business	NVS	Overnight visitors	139,000	5.7%
		Visitor nights	654,000	4.6%
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Education	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p
Other	NVS	Overnight visitors	64,000	6.8%
		Visitor nights	319,000	0.5%
	IVS	Overnight visitors	n/p	n/p
		Visitor nights	n/p	n/p

Source: Tourism Research Australia, National and International Visitor Surveys, year ending September 2016.

Notes: OVE = Overnight visitor expenditure. "n/p" = not publishable due to low sample size.