DESTINATION MANAGEMENT PLAN

for Tourism in Brisbane

2008 – 2011

Historic buildings, Laidley

Foreword

Regional Tourism Organisation Chairman

Brisbane is amongst the world's most desirable destinations. As a city it has extraordinary strengths; its wonderful subtropical climate and meandering river, its diverse and rewarding leisure and travel experiences, its unconventional, youthful and progressive personality.

Working collaboratively with all of industry and government, Brisbane Marketing is committed to ensuring Brisbane's product offer and promotional approach is consistent to cement the city's standing as a world class destination. This relationship has already resulted in growing national and international visitor numbers, countless articles dedicated to Brisbane as a tourist destination in the global media and billions of dollars injected into our city's economy.

This destination management plan is the road map for all those involved in the tourism industry to ensure Brisbane's tourist offering is second to none, to build on the outstanding work already done and secure our position on the world stage.

■ **MR IAN KLUG** Chairman

Regional Tourism Organisation Chair

Destination Overview

Brisbane is a diverse subtropical destination offering visitors a range of experiences all within one hour's drive of the metropolitan area. The Brisbane destination includes: Brisbane City and surrounds, offering a capital city experience; Brisbane's Moreton Bay and Islands, offering a coastal experience; and Greater Brisbane Country, offering a range of hinterland, rural and country experiences.

Vision

Brisbane is recognised amongst the world's most desirable destinations for leisure, business and lifestyle. It is a youthful and progressive Australian city offering access to diverse and rewarding tourism experiences.

CONTENTS

Executive Summary

Brisbane isn't changing, it has changed! Brisbane today is a vibrant and dynamic destination offering a wide range of unique urban, natural, coastal and island experiences. The city is a modern and diverse subtropical metropolis. From the city, visitors can access both coastal and country experiences within a 200km radius of an international airport. With a capital city experience boasting world–class sporting, cultural, and convention facilities, Brisbane has all the trimmings of an emerging international city. Brisbane as a destination is comprised of a number of distinctive and attractive sub–destinations:

- Brisbane City and Surrounds
- Brisbane's Moreton Bay and Islands
- Greater Brisbane Country (including the Scenic Rim and Country Valleys)

The destination is located in one of Australia's fastest growing population centres, South East Queensland. Leisure visitation to the destination is dominated by intrastate day trips and short breaks of three nights or less. International visitation is a growing component of total trips with longer average stays than the domestic market, accounting for 42% of the destination's visitor nights.

The destination is emerging from the perception of being a sleepy little town to be one of the nation's most dynamic cities, renowned for its business opportunities. It is increasingly being recognised as a leisure and tourism destination offering a number of exciting new tourism products and experiences.

As the State's capital, Brisbane and the destination surrounding it play a key role in the State's tourism industry. A key access point to the State, Brisbane provides 80% of the international air capacity to Queensland and the lion's share of domestic seat capacity. Not just a gateway to the rest of Queensland, Brisbane hosts the largest share of domestic and international visitors. In fact almost one third of all international expenditure and almost one fifth of all of the State's domestic tourism expenditure occurs in the Brisbane destination.

The destination's key challenge is to develop a strong and unique brand, then educate the target markets on the destination's attributes and build the products and services required to meet the increasing demand and expectations of global travellers. New products including the Gallery of Modern Art, the Brisbane Cruise Terminal, urban adventure experience, new retail outlets, and a number of boutique hotels have created a renewed interest in Brisbane as a leisure destination. With the increased promotion of Southern Queensland as an international destination, Brisbane needs significant product development, as well as skills and training to establish its place as a key plank in the Southern Queensland experience.

Marketing Brisbane

Brisbane is seen as a city that is growing, modern, upcoming and on the way to defining its future. Compared with Sydney and Melbourne, Brisbane can genuinely claim to be a youthful, progressive, outdoors and active city that goes about its business in its own unique style. Taking advantage of record levels of migration from the southern states and rapid economic growth, Brisbane is rising but is yet to clearly establish its place on the domestic leisure tourism scene.

The core positioning strategy for Brisbane is to clearly differentiate the destination from key competitors by establishing a distinctive and attractive brand image based on its main strengths and appeals, in consideration of the perceived needs and interests of target markets. This positioning will be the focus of all tourism development and marketing activities and is the primary reference point for stakeholder partnerships.

While it is envisaged that the positioning of the destination will focus on the characteristics of specific target markets, the overall brand platform for Brisbane provides a consistent, unified, overarching theme as the basis for all destination development and marketing activities.

Local produce, Redlands

Destination Goals

1. Increase awareness, preference and intention in key target markets
2. Increase visitor expenditure
3. Increase number of tourism jobs
4. Increase tourism investment and infrastructure in the Brisbane destination
5. Ensure sustainable development of the destination's tourism product

Key Strategic Priorities

In terms of charting a direction for the next three years (2008–2011), key strategic priorities have been identified through a process of industry feedback and key stakeholder workshops. These priorities are:

1. Improve brand perceptions and awareness through targeted marketing

Market perceptions and product awareness of the Brisbane destination need to be strengthened primarily in key domestic markets to maintain market share. Innovative and targeted marketing both domestically and internationally is essential to change brand perceptions and raise awareness of the depth of tourism products and experiences. In order to achieve this Tourism Queensland (TQ) and Brisbane Marketing (BM) will embark on a major branding project for the destination in 2008 and continue to concentrate on cooperative advertising, media and public relations in key markets.

2. Encourage development of sustainable product that delivers the Brisbane destination experience

A greater emphasis is to be placed on facilitating the development of new tourism product in the Brisbane destination. In particular, TQ and BM will work to encourage further accommodation and attraction development in the destination, and advocate the continued investment by government stakeholders in securing events and festivals. Both Brisbane's Moreton Bay and Islands and the Scenic Rim sub–destinations will be a focal point for such activity in addition to the Brisbane City and Surrounds.

3. Improve access, dispersal and participation in the Brisbane destination tourism experience

The Brisbane destination's competitive advantage lies in having the facilities and services of an international city in close proximity to outstanding natural attractions in a sub tropical setting. Improved access to and within the destination, development of the emerging sub–destinations, along with enhanced visitor information provision, will ensure greater dispersal throughout Brisbane.

4. Encourage participation in industry training and education

While hospitality and retail services in Brisbane have improved dramatically in the past five years, there remains a need to enhance the quality of service throughout the destination. Attracting and retaining quality staff as well as investing in appropriate education and training is a key priority. Greater networking and sharing of information across the industry and other stakeholders will also be encouraged.

5. Leadership and partnerships

Stakeholders across the destination recognise the continuing need to articulate and market the benefits of tourism. TQ and BM will work with industry to continue to improve communication and coordination, and encourage a leadership structure that is locally based and representative.

Manly Boat Harbour

A Planned Approach

Tourism is Queensland's second largest export industry, and is one of the main drivers of the State's economic growth. A multifaceted, many–layered service industry, it comprises a wide variety of private and public sector stakeholders that are either directly or indirectly engaged in the business of tourism. For Queensland and Brisbane to continue to secure the benefits of tourism, the Queensland Tourism Strategy (QTS) has been developed to offer a ten year vision (2006–2016) and to ensure there is strong coordination and links between business and government throughout the State.

At the regional level, this need is addressed by the production of a suite of Destination Management Plans (DMPs). This document represents the outcome of destination management planning for the Brisbane destination. The Brisbane DMP will guide the planning processes and programs of BM, and TQ over the next three years (2008–11). It is envisaged that the key ideas and strategies outlined in the plan will also inform the action plans of other stakeholders with an interest in the coordinated and sustainable development of tourism in the destination.

Chapter 1
Vision for the Destination

1.1 VISION

Brisbane is recognised amongst the world's most desirable destinations for leisure, business and lifestyle. It is a youthful and progressive Australian city offering access to diverse and rewarding tourism experiences.

1.2 GOALS AND MEASURES

To assist the Brisbane destination in achieving its vision, the following goals and performance measures have been identified for the next three years (2008–2011).

Goal	Measure
Increase awareness, preference and intention in key target markets	■ Growth in number of Brisbane preferrers and intenders from the target markets ■ Growth in positive associations with brand attributes
Increase visitor expenditure	■ Growth in visitor expenditure and average length of stay in Brisbane
Increase number of tourism jobs	■ Growth in employment in the Brisbane destination's tourism and hospitality industry
Increase tourism investment and infrastructure in the Brisbane destination	■ Growth in appropriate tourism investment as outlined in the Destination Management Plan (DMP)
Ensure sustainable development of the destination's tourism product	■ Stakeholder support and consideration of content of the DMP through references to the document in their strategic planning ■ Development of new product suited to the needs of the target market ■ Increase in international ready product


Bikeriding along the Kangaroo Point boardwalk

1.3 TARGET MARKETS

This section identifies and prioritises those market segments that provide the greatest potential for the growth of tourism in the Brisbane destination. The process has taken into consideration current target markets, as well as an analysis of the destination's strengths, weaknesses, opportunities and threats. These target markets will be the primary focus for product development and marketing activities over the next three years (2008–2011). The secondary target markets are the current market to be maintained and their length of stay increased through marketing and development activities. For more information on these markets refer to Chapter 4.2.2 Destination Branding, Target Markets and Marketing Activities.

Primary Target Markets

- Young (18–44 years) singles and couples, living in Sydney or Melbourne
- Midlife (45–64 years) households, living in Sydney or Melbourne

Secondary Target Markets

- Young (18–44 years) couples and singles, living in regional Queensland and Northern New South Wales
- Midlife (45–64 years) households, living in regional Queensland and Northern New South Wales

Emerging Markets

- Residents within the wider Brisbane destination
- Business and education visitors extending into tourism leisure
- International markets – primarily from New Zealand, United Kingdom and United States

A key priority for the Brisbane destination is to convert a greater percentage of existing business, conference and incentive, visiting friends and relatives and travel for a purpose visitors (e.g. sporting event, cultural event) to engage in commercial tourism activities and experiences.

1.4 COMPETITIVE AND DESTINATION POSITIONING

The core positioning strategy for Brisbane is to differentiate the destination clearly from key competitors by establishing a distinctive and attractive brand image based on its strengths and appeals, in consideration of the perceived needs and interests of target markets. This positioning will be the focus of all tourism development and marketing activities and is the primary reference point for stakeholder planning initiatives.

While it is envisaged the positioning of the Brisbane destination will focus on the needs of specific target markets, the overall brand platform provides a consistent, unified, overarching theme as the basis for all destination development and marketing activities.

Main Attributes and Appeals

For the target markets:

- Shopping
- Restaurants
- Arts and cultural diversity
- Professional sports
- Major events, shows and entertainment
- Professional services
- Natural experiences in Brisbane's Moreton Bay and Islands and Brisbane's Scenic Rim
- Southbank and cultural precinct
- A place for major national/international business and sporting events
- Attractive lifestyle location in South East Queensland and proximity to popular coastal regions
- Urban experience in an appealing climate

Brand Personality

- Youthful and creative
- Fun
- Enthusiastic
- Carefree
- Outdoor and active
- Up and coming

Benefits of the Destination Experience

- Carefree
- Relaxing
- Exciting and entertaining
- Playful
- Culturally diverse
- Subtropical climate
- Capital city events and attractions

Competitive Differences

- More people are moving to the destination – strong visiting friends and relatives (VFR) market
- Hub of South East Queensland and proximity to world class coastal regions
- Mixture of leisure experiences – city, bays, beaches, country and hinterland, and World Heritage–listed wilderness areas in close proximity to a major urban/city experience

Positioning Statement

The Brisbane destination is a modern and diverse subtropical metropolis, offering visitors a 'big city' experience in a warm, friendly and relaxed environment, with easy access to coastal, island and natural experiences.

Destination Brand

The Brisbane destination brand is a confident, youthful, carefree and progressive message, delivered through creative that includes elements such as a logo, headline style, boarder treatments and imagery. The brand encompasses the character of the destination through the use of colour, imagery and creative headlines.

Brisbane

Regional Positioning

The regional position for Brisbane focuses on the destination's appeal as an exciting events, sports and entertainment venue. It emphasises a 'city' experience, including shopping, dining, nightlife, culture, events and festivals, with access to a range of diverse and attractive coastal, island and natural experiences.

National Positioning

The Brisbane destination is a vibrant and dynamic hub for a wide range of unique urban, natural, coastal and island experiences. The long–term strategy is to position Brisbane as a destination that is confident, optimistic, fun, enthusiastic and carefree. The subtropical capital city is the gateway to the diverse South East Queensland region, which features world famous beaches and hinterland, and an ecologically rich range of wilderness and natural experiences. The Brisbane destination also boasts city offerings such as shopping, dining, the Southbank precinct and a renowned music scene.

International Positioning

The focus is on positioning the Brisbane destination as the hub of Southern Queensland, a large and varied international leisure destination. This positioning links the capital city experience with the coastal strip that stretches from the Gold Coast, up to and including the Fraser Coast. Completing the Southern Queensland experience is the broad expanse of Southern Queensland Country, with rolling hills, vineyards, rainforest and wilderness areas. Brisbane and surrounds is an intrinsic part of the Southern Queensland experience, and a safe, welcoming Australian holiday. In its own right, the Brisbane destination is also an attractive stopover point for travellers on a Queensland or Australian holiday.

Kayaking on the Brisbane River

Chapter 2

Key Strategic Priorities

In terms of charting a direction for the next three years (2008–2011), Tourism Queensland and Brisbane Marketing have identified the following key strategic priorities for the destination, in consultation with industry. These priorities were formed through a synthesis of a Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis. The priorities complement those in the Queensland Tourism Strategy (QTS) creating a seamless link from the initiatives of that strategy to the Destination Management Plan (DMP).

1. Improve brand perceptions and awareness through targeted marketing

- Continue to position the Brisbane destination as a capital city experience in intrastate marketing, by ensuring a continuity of messages under the Brisbane brand and cooperative campaigns
- Consolidate and build on the success of the inaugural interstate marketing campaign by strengthening the brand and its translation into marketing activities for both the leisure and business sectors
- Develop greater levels of destination awareness under the Southern Queensland brand in key international markets including New Zealand, United Kingdom, and United States
- Focus on media and publicity in order to strengthen brand activity in the target markets, both nationally and internationally

2. Encourage development of sustainable product that delivers the Brisbane experience

- Through a Regional Tourism Investment and Infrastructure Plan, identify and facilitate the development of new tourism product and packages for the sub–destinations of Brisbane
- Raise industry and government awareness of Brisbane city's accommodation shortage and encourage further accommodation development
- Encourage continued investment by government stakeholders in infrastructure required to secure and host domestic and international events and festivals
- Leverage off the growth in arts and cultural offering in the Brisbane destination, and create stronger linkages between the Southbank and Cultural precincts

3. Improve access, dispersal and participation in the Brisbane tourism experiences

- Improve the visitor experience through enhanced integrated interpretative and directional signage, visitor information provision and improved local access and transport
- Convert a larger proportion of existing business, visiting friends and relatives, or travel for a purpose visitors (e.g. sporting or cultural event) to engage in commercial tourism experiences
- Increase length of stay through improved dispersal throughout the Brisbane destination

4. Encourage participation in industry training and education

- Attract and retain skilled, experienced staff in the tourism industry
- Provide appropriate education and training for key sectors and sub–destinations within Brisbane
- Raise the standard of retail, dining and hospitality service quality through increased participation in industry networks and clusters

5. Leadership and partnerships

- Continue to improve communication and coordination of tourism activities across the destination
- Establish an effective regional implementation network to prepare and implement a Destination Action Plan for success of the ongoing marketing and development
- Encourage a strong, well resourced, locally based and representative leadership structure
- Encourage Brisbane residents to recommend to visitors to engage in more commercial tourism experiences (including business travellers and those visiting friends and relatives)
- Advocate the high ecological values of the destination, and the need for appropriate management and planning to ensure long–term viability

Woody Point, Redcliffe

Chapter 3

Strategies to Achieve the Vision

The table below lists the strategies that will achieve the destination's vision and they address all of the key strategic priorities for the destination (refer to Chapter 2 Key Strategic Priorities). These strategies are intentionally highline and will generally not change during the lifetime of the Destination Management Plan (DMP). However, the methods of carrying out these strategies will probably vary from year to year, and are articulated in the annual Destination Action Plans (DAPs). Refer to Chapter 5 for an explanation of the DAPs.

STRATEGIES FOR SUCCESS
Market Research and Insights
Monitor and analyse **destination performance**, market trends and visitor satisfaction to ensure the destination remains attuned to the target markets' needs and preferences.
Ensure industry has access to reliable and current domestic and international **visitor research** to allow insightful and informed decisions regarding business priorities and actions.
Develop a mechanism for collecting and communicating reliable **visitor data and statistics** for the Brisbane destination in the areas of visitor satisfaction, accommodation performance and visitation to nature based attractions.
Regularly undertake and analyse Brisbane destination **visitor satisfaction research** to ensure the destination remains attuned to target market needs and preferences and that customer service is meeting expectations.
The Brisbane Destination Brand
Encourage relevant **stakeholders to adopt the brand positioning**, imagery and key messages for the Brisbane destination, developed through a collaborative brand development process.
Develop a **second phase of the destination marketing campaign** in the interstate (Sydney and Melbourne) and intrastate (drive) markets to provide a longer–term brand architecture, creating a platform for greater tourism and business marketing partnerships.
Positively **influence and change interstate target markets' perceptions of Brisbane** as a leisure and business destination and build brand awareness.
Encourage tourism partners to **engage in consistent communication of key brand messages** through the availability of marketing tools with compatible images, messages and themes to those outlined in the brand blueprint.
Marketing the Brisbane Destination Experience
Enhance **awareness** and perception of the things to see and do in the Brisbane destination for those in regional Queensland and the Brisbane residents market.
Design and implement tactical marketing programs to increase the **short break weekend** market, both intrastate and interstate.
Promote the Brisbane destination as the hub of the 'Southern Queensland' marketing alliance to identified **international markets**, including a focus on the 'Great Sunshine Way' as a promotional and packaging tool.
Work with local government, Chambers of Commerce and industry to ensure **tourism marketing is appropriately funded** in each sub–destination.
In key target markets, increase awareness of the **diversity of tourism product and experiences** in the destination.
Increase business events – including potential meetings, conventions and exhibition visitation in the key interstate target markets of Sydney and Melbourne.
Increase **meetings, conventions and exhibition visitation** in the key international target markets.
Seek continued growth in industry support for and investment in **domestic and international marketing activities**, familiarisations and trade missions.
Increase **representation of Brisbane destination product** in international wholesaler/inbound programs.

continued

Marketing the Brisbane Destination Experience

continued

Be a market leader in **innovative online marketing and communication**, including a refreshed web–marketing strategy.

Develop a **business traveller 'extend your stay campaign**', encouraging business travellers to extend stay to include leisure experiences and also to bring their family for leisure whilst on business.

Develop marketing campaigns in partnership with key stakeholders to promote significant **events and festivals** for the short break market.

Develop marketing initiatives to promote the **Brisbane's Moreton Bay and Islands** sub–destination under the Brisbane destination marketing program in the South East Queensland market.

Review the **marketing, positioning and partnerships** underpinning Greater Brisbane Country to ensure the best alignment of activities.

Enhance the **coordination of marketing effort** between Tourism Queensland, Brisbane Marketing, local government and industry.

Increase the reach of the quarterly ***Experience Brisbane* magazine** through online linkages and extension into the local (Brisbane) market and the reach of the ***Brisbane Visitor's Guide***.

Continue to attract relevant and high profile **media and trade to participate in familiarisations** in the Brisbane destination and spread the word about the destination's new product.

Encourage smaller tourism businesses to participate in **cooperative online booking solutions** to increase the availability of Brisbane destination product bookable online.

Encourage greater industry **participation in domestic marketing campaigns** through the development of a spectrum of advertising opportunities at a number of price points.

Leverage off the development of the Gallery of Modern Art (GoMA) to create stronger linkages in the **South Bank and Cultural Precinct** and identify promotional partnership opportunities.

Work with Local Tourism Organisations (LTO), councils and the Regional Tourism Organisation (RTO) to establish suitable mechanisms for the **coordination and marketing of events and festivals**.

Developing a Sustainable Brisbane Destination Experience

Undertake product audits and opportunity assessments as part of the development of a **Regional Tourism Investment and Infrastructure Plan** (RTIIP) to identify gaps in current product offerings linked to identified market need.

Work with key stakeholders in the Brisbane destination to raise industry and government awareness of the **city's accommodation shortage** and encourage further hotel development in the city (including six star, boutique and corporate hotels).

Work with local government across Brisbane to further **improve access** options and support the tourism opportunities in the destination.

Work with key stakeholders and agencies to maintain and grow current **air capacity** and negotiation of new air services to the destination.

Continue to work with Department of Main Roads (DMR) and local councils to progress the **Drive Tourism Strategy** and key tourist drives (including the development of the Scenic Rim Tourism Drive).

Investigate the opportunity for **greater transport linkages** for visitors between Moreton Bay Islands, coastal villages and Brisbane River.

Develop a co–ordinated approach to **public transport** between councils, transport providers and industry.

Develop appropriate visitor access to emerging destinations through facilities and tours on the **Brisbane River**.

Work with Greater Brisbane Country local governments, Royal Automotive Club of Queensland (RACQ) and DMR to better integrate and market new and existing **tourist drives** into collateral, interpretation panels and Visitor Information Centres (VIC) and create stronger linkages between established tourist drives.

continued

Developing a Sustainable Brisbane Destination Experience *continued*
Encourage the **development of new tours and packaged product** to provide a greater range of experience for the target market in the Brisbane destination and across the three sub–destinations (Brisbane City, Brisbane's Moreton Bay and Islands, and Greater Brisbane Country).
Identify priority **niche markets** in each of the three sub–destinations and encourage the development of product to meet the needs of these target markets (e.g. adventure, fishing, education).
Work with key stakeholders to ensure a coordinated approach to securing and running **significant events and festivals** in Brisbane city.
Encourage the development and connection of **urban villages and new precincts** (e.g. Fortitude Valley Music precinct) to the city.
Develop attractions and experiences that reflect the **history and culture** of the Brisbane destination.
Work with key agencies to investigate the development of **boutique, nature based, caravan and camping, and country cabin style accommodation** for Greater Brisbane Country.
Investigate the potential for development of **eco–tours, history and heritage, and arts and crafts** in Greater Brisbane Country.
Work with local government and relevant approval agencies in State Government to investigate the development of **boutique accommodation** for Brisbane's Moreton Bay and Islands.
Enhance the **visitor experience** for Brisbane's Moreton Bay and Islands by developing greater linkages and improved access to significant attractions, especially those with wildlife and marine tourism opportunities.
Explore options to improve the **linkages between existing wineries**, cellar doors and restaurants supporting local wine and produce to create a wine tourism experience for the destination.
Work with key stakeholders to **support tourism development in Brisbane's Moreton Bay and Islands**, e.g. Brisbane's Moreton Bay and Island Cycleway Project, Slow Food Movement, Sustainable Tourism, and Indigenous tourism.
Work with key partners domestically and internationally to develop and implement the **Great Sunshine Way** as a 'product bundling' tool under the Southern Queensland brand umbrella.
Develop a **Tourism Action Plan** for the Scenic Rim, as part of a broader review of tourism priorities in Greater Brisbane Country, incorporating the development of the Ipswich to Boonah trail and the emerging nature–based and wildlife tourism opportunities.
Work with key stakeholders to create stronger partnerships for **commercial activity within national parks, including improved infrastructure**.
Recognise the impact of climate change and the drought on tourism experiences and visitors' perceptions. Work collaboratively to dispel misconceptions and reinforce positive experiences in a consistent and realistic manner.
Work with accredited VICs to **enhance the provision of visitor information** and services.
Work with local government to ensure the quality of **amenities and service**s provided meet the needs and expectation of visitors to the Brisbane destination.

The Enablers of Success listed opposite are the key policy and procedural conditions that need to be in place for the Strategies for Success to be effectively implemented.

continued

ENABLERS OF SUCCESS

Planning and Coordination

Establish a **Destination Action Group** (DAG) to integrate the initiatives of all stakeholders working in tourism.

Encourage the formation of an informal international education or **Study Tours cluster for the Brisbane destination**, with representatives from key agencies involved in delivering services and promoting Brisbane to this growing and important market.

Encourage the development of **Recreational Fishing and Marine Tourism** in partnership with key agencies.

Support the progress of an **Adventure Tourism** industry in Brisbane with the assistance of key stakeholders involved in delivering services and promoting the Brisbane destination to this growing market, including the backpacker market.

Encourage the tourism industry to become active in **Crisis Management Planning** and increase awareness of Emergency Response Plans such as 'Brisbane Secure' launched in 2007.

Develop a **RTIIP** for Brisbane and a dedicated RTIIP for Brisbane's Moreton Bay and Islands.

Encourage **stronger linkages between tourism planning with statutory planning tools** including the SEQ Regional Plan, the Brisbane City Council (BCC) Economic Development Plan, local growth management strategies, Social Infrastructure Planning and Rural Futures Strategy through the process of implementing the DMP and developing the RTIIP.

Industry Leadership and Coordination

Provide industry with strong leadership in the **marketing and development** of tourism in the Brisbane destination.

Encourage the Regional Tourism Organisation and industry within the Brisbane destination to promote existing **industry training programs** where suitable in the areas of marketing, product packaging, media and public relations, business planning, customer service, and distribution.

Foster an integrated industry leadership structure and effective, flexible **partnerships** between public and private stakeholders, following the completion of the Queensland Tourism Strategy (QTS) Network Review.

Leveraging from the QTS, work with key agencies to develop and implement a coordinated approach to industry **skills and training** in the Brisbane destination.

Industry Development

Complete an **industry training needs analysis** for the Brisbane destination.

Increase awareness of the benefits of the **Australian Tourism Data Warehouse**, taking advantage of the subsidy provided through the QTS, to advance the destination's digital marketing capacity.

Work with appropriate stakeholders to **improve the inconsistent hospitality**, retail and product service delivery through use of existing training and education programs.

Community Engagement

Engage the community in tourism activities to encourage broad **community awareness** of, and support for, the value of tourism as part of a diversified regional economy. Elevate the awareness of tourism career opportunities, and engage communities in planning ways to minimise the impact of tourism on their lifestyle and community aspirations.

Provide key tourism stakeholders (RTO, LTOs, local government and local media) with regular **information about the value of tourism** to their destination to engender more support for the industry locally.

Workforce Development

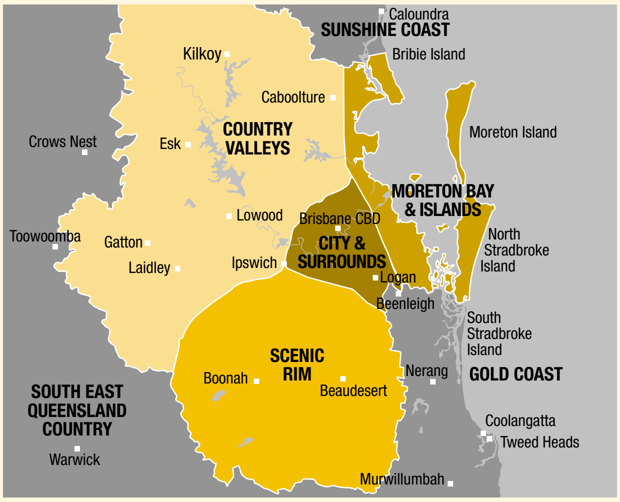
Ensure the **Brisbane destination workforce** is appropriately skilled and trained in all aspects of business, tourism and hospitality.

Facilitate **workshops that raise awareness of the existing training and education programs** available to operators in the Brisbane destination.

Ensure the professional development of **tourism service delivery** through accreditation, educational workshops and conferencing.

4.1 DESTINATION OVERVIEW

Brisbane is a diverse subtropical destination offering visitors a range of experiences including: Brisbane City and Surrounds offering capital city experience, Brisbane's Moreton Bay and Islands offering a coastal experience and Greater Brisbane Country offering a range of hinterland, rural and country experiences, all within one hour's drive of the metropolitan area.



Brisbane City and Surrounds – The city of Brisbane is a modern subtropical metropolis. It is a progressive and inclusive capital city offering visitors a stimulating city experience in a warm, friendly and relaxed environment. Brisbane City and Surrounds includes key urban areas and emerging precincts, all of which are well serviced by public infrastructure, including cultural precincts, world class sporting venues, conference venues, parklands and river walks. These areas are also strategically well serviced by road, rail and air networks and a modern cruise shipping terminal.

Brisbane's Moreton Bay and Islands – Encompassing the coastal villages and over 350 sand islands from the Logan River to Bribie Island, Brisbane's Moreton Bay and Islands is a natural wonder. Protected as a Marine National Park and located within one hour's transit time of the city, this sub–destination offers a multitude of leisure, recreation and holiday opportunities for day trips and short stays. The sub–destination includes Bribie Island, Moreton Island, Redcliffe, Sandgate, Wynnum–Manly, Redlands and North Stradbroke Island, plus the islands of Southern Moreton Bay.

Greater Brisbane Country – Moving inland, the non–coastal area embraces a distinct Queensland country feel with an array of historic towns, fertile farming country, surrounded by a magnificent mountain range. Separated by the Warrego Highway, Greater Brisbane Country is promoted in two distinct but complementary sub–destinations: the **Scenic Rim** and the **Country Valleys**. While Greater Brisbane Country is considered part of the Brisbane destination, the non–coastal areas also fall under the overarching destination umbrella of South East Queensland Country (SEQC). Readers are advised to refer to the SEQC Destination Management Plan for more information on these country areas (available from **www.tq.com.au**). The Beaudesert Local Government is associated with both the Brisbane and Gold Coast Regional Tourism Organisations and collaborates on numerous marketing campaigns in SEQC.

The Scenic Rim offers a spectacular hinterland country experience south of the Warrego Highway. While the **Country Valleys** extends to the north of the Warrego Highway offering a traditional rural country experience. Both are ideal day–trip and short break destinations and are easily accessible from the CBD and airport.

Community Profile and Economy

Conveniently located between the Gold Coast and Sunshine Coast in South East Queensland, the Brisbane destination includes the central Local Government of Brisbane City, the surrounding cities of Ipswich, Logan and Redcliffe, and the non–metropolitan Shires of Boonah, Caboolture, Esk, Gatton, Kilcoy, Laidley, Pine Rivers and Redland. A number of Regional Councils will be established in 2008, including Moreton Bay Regional Council (Redcliffe, Caboolture and Pine Rivers combined), Somerset Regional

ECONOMIC SNAPSHOT OF BRISBANE

The main industry contributors to the Brisbane GRP in 1998–99 were[1]:

- Government Administration, Defence, Education, Health and Community Services 15.9% ($7,417 million)
- Finance, Insurance, Property and Business Services 15.8% ($7,387 million)
- Retail and Wholesale Trade 13.2% ($6,156 million)

The largest number of businesses in Brisbane in 1998 were in the:

- Retail and Wholesale Trade 25% (20,079 businesses)
- Finance, Insurance, Property and Business Services 24% (19,543 businesses)

The main industry employers in Brisbane 2001 were:

- Government Administration, Defence, Education, Health and Community Services 23% (170,226 persons)
- Retail and Wholesale Trade 20% (150,328 persons)
- Finance, Insurance, Property and Business Services sector 16% (114,392 persons)

[1] The Gross Regional Product (GRP) estimates are generated at the Statistical Division (SD) level. Brisbane is one region within the Brisbane–Moreton SD. Economic GRP data specific to the Brisbane region has been separated out by OESR

Council (Kilcoy and Esk), Lockyer Valley Regional Council (Laidley and Gatton) and Scenic Rim Regional Council (Boonah and southern areas of Beaudesert). Redland Shire Council will also become Redland City Council. The implications of this change to the tourism network and other stakeholders is yet to be evaluated.

The destination covers 0.87% (14,913 km^2) of the total area of Queensland and is home to almost half of the State's population (46% or 1,652,458 persons at 31 December 2001). Within the destination, Brisbane City contains over half of the destination's population (54% or 898,480 persons). The annual average rate of population change in the Brisbane destination for the five years to December 2001 was 1.8%, equal to the overall Queensland population growth rate.

South East Queensland (SEQ) has experienced high and sustained population growth since the 1980's, growing at an average of 55,000 persons each year between 1986 and 2004. This makes SEQ the fastest growing region in Australia and one of the fastest in the western world. In 2006 there were 2.7 million people in SEQ. This number is predicted to grow to 3.7 million by 2026, creating a demand for 425,000 new jobs. The 2003 Jones Lang LaSalle report 'World Winning Cities' identified SEQ as Australia's fastest growing region over the next ten years. Benefiting from 'sun–belt migration' and its status as a tourist destination of global significance, Brisbane is one of the best placed destinations in the world to offer the advantages of environmental and social sustainability.

Brisbane is rapidly expanding with over $23.3 billion in projects completed, under construction, committed or under study in 2006, and a total of $58.7 billion in SEQ.

The Tourism Sector

During the 1998–99 period tourism contributed 3.8% ($1,766 million) to the Gross Regional Product (GRP) of the Brisbane destination[1]. Due to the significant volume produced by other industries in Brisbane, this percentage contribution was lower than the Queensland average, with tourism contributing 6.4% ($6,292 million) to the Gross State Product (GSP) over the same period. However, in terms of the total contribution of tourism to Queensland's GSP, the revenue generated by tourism in Brisbane ($1,766 million) was greater than the contribution from any other region in 1998–99. The value of Brisbane's tourism contribution represented over one quarter (28%) of the State's total tourism revenue.

A Growing Demand

Research by Roy Morgan in 2006 demonstrated that after years of focusing on coastal holiday, Australian cities are now in demand as tourism destinations. The introduction of low–cost domestic airfares has provided the impetus for increased travel, including high–spending travellers.

Craft market, Kilcoy

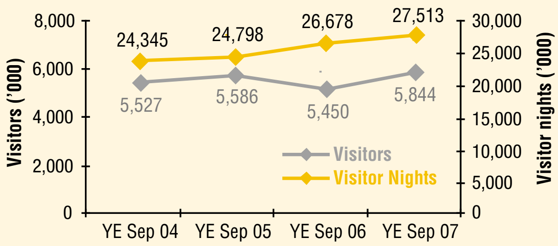
[1] The Gross Regional Product (GRP) estimates are generated at the Statistical Division (SD) level. Brisbane is one region within the Brisbane–Moreton SD. Economic GRP data specific to the Brisbane region has been separated out by OESR

4.2 MARKETING AND DEVELOPMENT

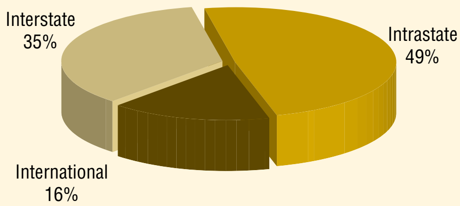
4.2.1 Destination Market Trends

This section provides insights into key domestic and international tourism trends in the destination over the three–year period from 2004 – 2007. As the data behind these trends changes on a regular basis, please refer to the Regional Update on Tourism Queensland's (TQ) corporate website **www.tq.com.au** for the latest information. Other research specific to the destination can also be found on the TQ website.

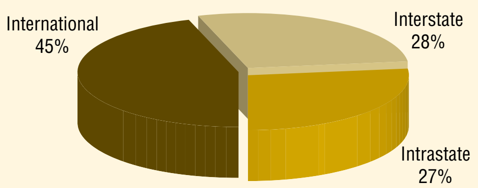
Total Visitors & Visitor Nights to the Brisbane Region 2004-2007



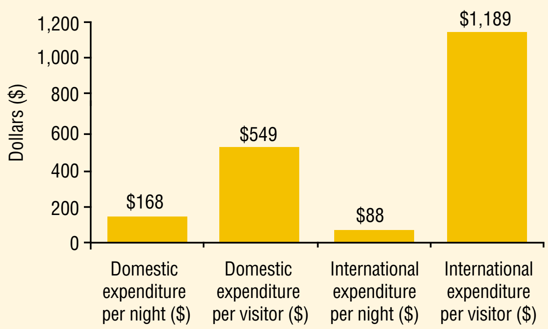
Source of Visitors to the Brisbane Region YE September 2007



Source of Visitor Nights to the Brisbane Region YE September 2007



Domestic and International Visitor Expenditure ($) to the Brisbane Region per Night and per Visitor YE September 2007



VISITOR OVERVIEW

Visitors and Visitor Nights[2,3,4]

There were 5,844,000 visitors to the Brisbane destination in the year ended (YE) September 2007. They spent 27.5 million nights in the destination.

Over the three years to September 2007, total visitor numbers have steadily increased (up 2% per year), as well as visitor nights (up 4% each year). Most travellers were domestic (84%). The majority of domestic travellers (58%) were from within Queensland.

The Brisbane destination predominantly attracts visiting friends and/or relatives (VFR) and holiday visitors, yet business visitors contribute to almost one quarter of the total market. More specifically:

- 37% were VFR
- 32% were on holiday
- 24% were on business

Over the three years to September 2007 holiday and business visitation experienced growth, as did visitor nights. Holiday visitors increased by 1% annually from the year ended September 2004 while holiday visitor nights increased by 7% each year. The VFR market declined annually over the three years to September 2007 with visitors down by 1%, and VFR visitor nights declining over the same period by 4% each year.

Holiday visitors stayed for a slightly longer period than VFR and business visitors. In the year ended September 2007, the average length of stay was:

- 4.5 nights for holiday visitors
- 4.4 nights for VFR visitors
- 2.8 nights for business visitors

Average length of stay for holiday visitors has increased over the three years to September 2007, up 0.7 nights. Over the same period VFR and business average length of stay declined by 0.4 and 0.2 nights respectively. This has equated to a slight increase in overall average length of stay (up 0.3 nights to average 4.7 nights).

Accommodation[5]

The destination's room occupancy rate has increased over the three years to September 2007, averaging 79.2% (up 4.1 percentage points from September 2006 or an average of 1.8 percentage points per year over three years form September 2004). Room nights occupied increased by 6% each year over the last three years, which was better than the State's 3% per year increase.

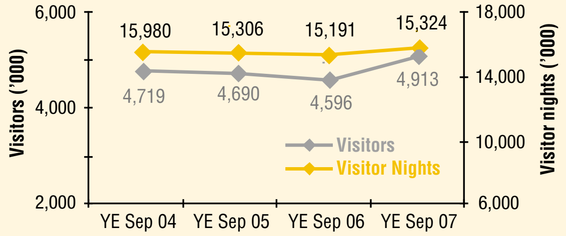
Expenditure[6]

Expenditure (including airfares and long distance transport) generated by domestic visitors to Queensland totalled $12,400 million for the year ended September 2007, while international expenditure (including package expenditure) totalled $3,727 million.

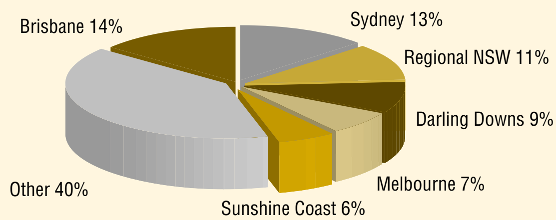
Over the same period 22% of all domestic visitor expenditure in Queensland was in the Brisbane destination ($2,697 million), while 30% of all international visitor expenditure in Queensland was in the Brisbane destination ($1,109 million).

[2] *Note that domestic and international visitor and visitor nights data is based on the Regional Tourism Organisation Brisbane destination and aligns with the Australian Bureau of Statistics defined 'Brisbane' destination.*
[3] *An outlier filter has been applied for the data contained within Section 4.2.1 of this publication. Data for all Queensland regions is filtered for outliers as unrepresentative survey results may skew data analysis.*
[4] *National Visitor Survey and International Visitor Survey, Tourism Research Australia*
[5] *Accommodation data is sourced from the Australian Bureau of Statistics Survey of Tourism Accommodation 15 or more rooms, hotels, motels and serviced apartments.*
[6] *Modelled expenditure estimates are based on ABS Brisbane destination by Tourism Research Australia.*

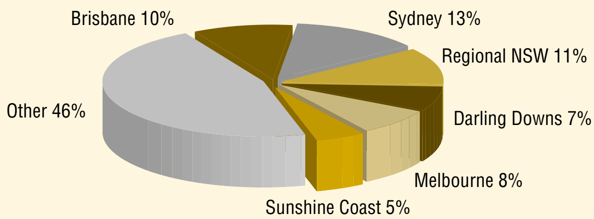
Domestic Visitors & Visitor Nights to the Brisbane Region 2004-2007



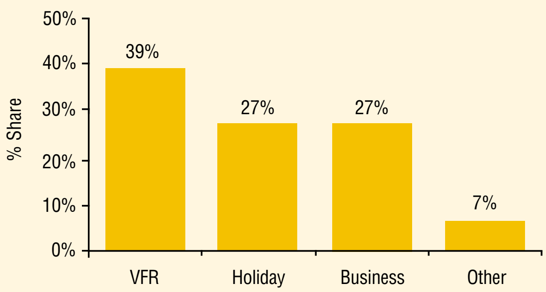
Source of Domestic Visitors to the Brisbane Region YE September 2007



Source of Domestic Visitor Nights to the Brisbane Region YE September 2007



Domestic Visitation to the Brisbane Region YE September 2007 by Purpose of Visit



DOMESTIC OVERVIEW

Visitors and Visitor Nights

Brisbane hosted 27% of all domestic visitors to Queensland in the year ended September 2007, this equated to 4,913,000 visitors and 15.3 million visitor nights.

More than one in three domestic visitors to the Brisbane destination were travelling to visit friends or relatives (39%) while just over one quarter (27%) were travelling for a holiday.

The Brisbane destination domestic visitation breakdown is:

- 39% for VFR
- 27% for holiday
- 27% for business

The Brisbane destination has a significant domestic VFR market, with these visitors representing a higher proportion of domestic travellers to Brisbane (39%) than to Queensland as a whole (33%).

Domestic Overview

The destination experienced minimal growth in domestic visitation over the three years to September 2007 (visitors up 1% each year on average), while visitation to the State increased at a faster rate (up 3%) over the same period.

The intrastate market accounted for 58% of all domestic visitors to the destination and increased by an average of 2% per year from September 2004. The smaller interstate (42% of domestic visitors) market increased by 1% over the same period, however visitor nights dropped by 3% resulting in a shorter average length of stay (down 0.4 nights from September 2007 to average 3.8 nights).

Both the holiday and VFR markets experienced a slight decline over the three years to September 2007 (down 1% and 2% respectively each year). It was business visitation that made the contribution to the increase in domestic visitation (an increase of 241,000 visitors over the three years to September 2007, or up 7% each year).

Source Market

The destination's two largest source markets, Brisbane and Sydney, both increased over the three years to September 2007, up 2% and 5% respectively each year. Visitors form Melbourne also increased (up 2% each year) yet visitor nights dropped by 3% each year.

continued

DOMESTIC OVERVIEW

continued

Accommodation

Domestic visitors spent more than half of their nights (58%) at the home of a friend or relative, while 21% were spent in a hotel, motel, resort or motor inn. Over the three years to September 2007, domestic nights spent in a hotel, motel or resort declined by 1% each year.

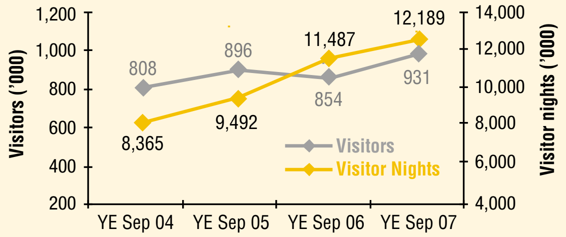
Four percent of domestic visitor nights were spent in a serviced apartment in the year ended September 2007. This is a 3% increase compared to September 2004 when they accounted for only 1% of all domestic visitor nights. There was a large increase in visitor nights over the three years to September 2007, up by 63% per year over the three years to September 2007 or an extra 525,900 visitor nights.

Transport

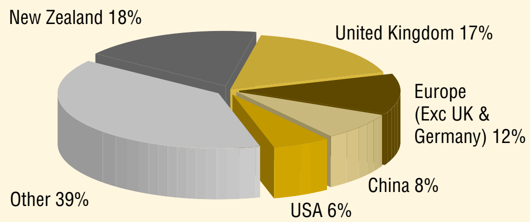
More than half of domestic visitors to the Brisbane destination travelled by private or rented vehicle (58%), while 36% travelled by air transport. Over the three years to September 2007 self drive visitors have declined by 2% while air travel has increased by 8% each year.

The Workshops Rail Museum, Ipswich

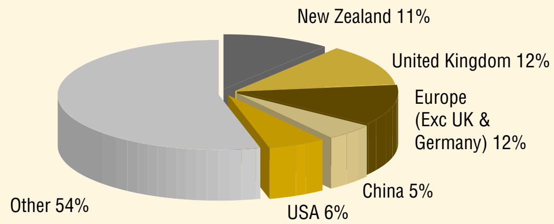
International Visitors and Visitor Nights to the Brisbane Region 2004-2007



Source of international Visitors to the Brisbane Region YE September 2007



Source of International Visitor Nights to the Brisbane Region YE September 2007



INTERNATIONAL OVERVIEW

Visitors and Visitor Nights

The Brisbane destination hosted 43% of all international visitors to Queensland, in the year ended September 2007, this equated to 913,000 visitors and 12.2 million visitor nights.

More than half of international visitors to the Brisbane destination were travelling for a holiday (57%). The Brisbane destination international visitation breakdown is:

- 57% for holiday
- 25% for VFR
- 10% for business

International Overview

Over the three years to September 2007 the Brisbane destination experienced growth in international visitation. Visitors and visitor nights both increased (up 5% and 13% per year, respectively). The increase in visitor numbers and nights was driven by the holiday market, (up 6% and 23% respectively each year).

Unlike domestic visitation, international visitors to the Brisbane destination are predominantly travelling for a holiday. In the year ended September 2007, holiday visitors stayed in the destination for an average of 7.3 nights, while VFR visitors stayed for longer, with an average length of stay of 12.7 nights. Holiday visitors' length of stay has increased substantially over the three years to September 2007 (up 2.6 nights from the year ended September 2004).

Source Market

The Brisbane destination's biggest international source market was New Zealand with an 18% share of the total inbound market. Following closely are visitors from the United Kingdom and Europe (excluding Germany and the UK) with 17% and 12% shares.

All three top source markets experienced an increase over the three years to September 2007. New Zealand increased by 2% each year, the United Kingdom increased by 3% while Europe saw a 9% increase each year.

continued

INTERNATIONAL OVERVIEW

continued

Accommodation

Almost one in three (31%) international visitor nights were spent in rented accommodation (house, apartment, unit or flat). Just under one third (29%) of international visitor nights were spent at the home of a friend or relative, 10% in a hotel, motel, resort or motor inn, and 9% in a backpacker or hostel.

Visitor nights spent in a hotel, motel, resort or motor inn, increased by 4% each year over the three years to September 2007 while visitor nights spent in a backpacker or hostel increased by 17%. This is in line with the increase in bed spaces available in Brisbane backpackers, since September 2005 there was an increase of 11% per year (or up 420 bed spaces with a new establishment).[7]

Travel Party Type

More than half (54%) of all international travellers to the Brisbane destination were travelling alone, while 23% were travelling as an adult couple. Visitors who were travelling alone increased by 8% each year over the three years to September 2007, while adult couples travelling together saw a slight decline of 1% per year.

Backpackers[8]

Almost one in five (17%) of all inbound visitors to the Brisbane destination were classified as backpackers. International backpackers to the destination increased over the three years to September 2007 (up 8% each year).

[7] The ABS data for Brisbane backpackers and hostels only dates back to 2005. 2004 data is not available for this accommodation sector.

[8] The definition of a 'backpacker' for this publication is an international visitor who spent at least 25% of their nights in a backpacker or hostel while on their trip to Australia.

Fishing in Pumicestone Passage

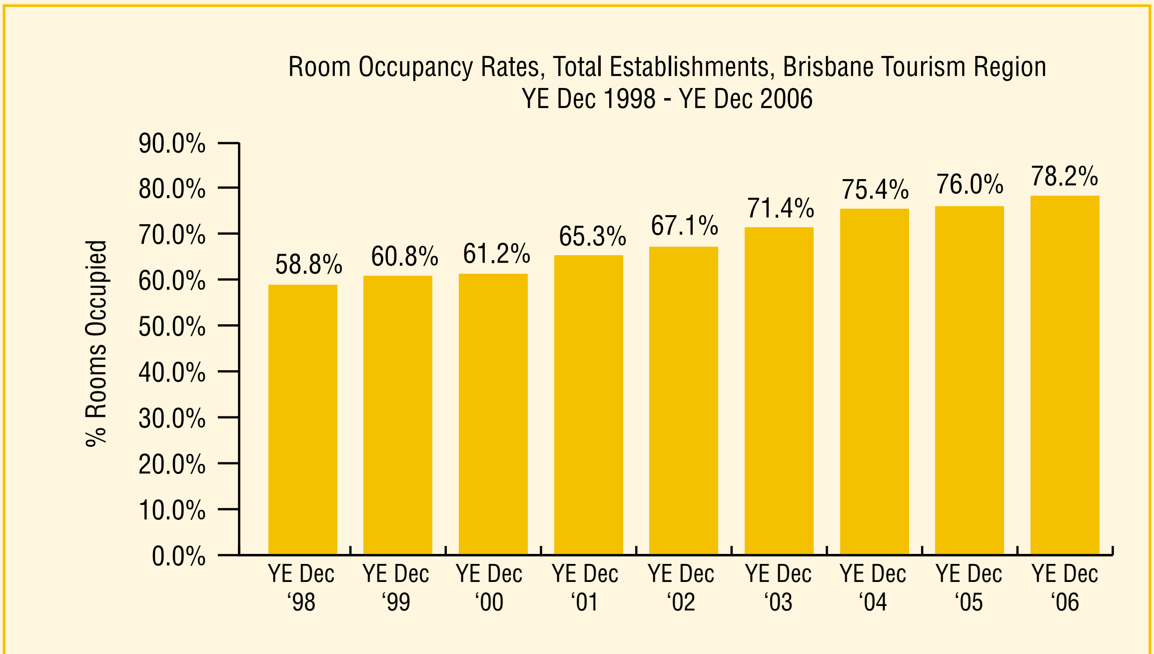
Commercial Accommodation

Visitation to the Brisbane destination traditionally peaks in July and is lowest in January each year. In the year ended December 2006, yield in both four and five star properties climbed as occupancy hit an all time high in July 2006 (above 90%), with yield increasing 12.0% and 13.5%, respectively.

In the year ending December 2006, accommodation occupancy averaged 86%, with a 7.8% increase in accommodation room stock (supply) since March 2006, outstripped by a 10% increase in room nights (demand) over the same period.

In the year ended December 2006, an additional 500 rooms became available (over three times more than any other destination in Queensland), but this was not sufficient to slow the ever–increasing average room occupancy. Much of the growth was in serviced apartments servicing the business market.

In 2006, the Brisbane destination recorded above average growth in daily room rates and takings per room. This is in addition to higher than average room rates and the second highest takings per room night available in the State (behind Whitsundays).



It is likely that occupancy in Brisbane’s commercial accommodation will remain above 80%, with the expected 1.9% increase in supply to be exceeded by the 2.3% increase in accommodation demand, between 2005 and 2009. This increase in demand will be driven by the international market to the Brisbane destination, with a 4.3% increase in the number of international visitor nights spent in commercial accommodation between 2005 and 2009, compared with a 0.8% increase in domestic visitor nights spent in commercial accommodation[9].

[9] *Source: Rutger Smits (2006), Brisbane Market Outlook 2006, HVS International, Sydney. www.hvsinternational.com*

AVIATION

Domestic

There were around 127,000 domestic inbound seats per week into Brisbane Airport in December 2007, a 7% increase on weekly seat capacity in December 2006.

Comparing December 2007 with December 2006, there were notable increases in capacity on the following routes:

- Canberra–Brisbane
- Perth–Brisbane
- Adelaide–Brisbane
- Hobart–Brisbane

Qantas operated over half (53%) of all seats into Brisbane in December 2007, with Virgin Blue and Jetstar accounting for 39% and 8% of the weekly inbound domestic capacity, respectively.

In the year ended September 2007[10], there were 12.8 million domestic passenger movements at Brisbane Airport (around 6 million arrivals and 6 million departures). Growth in passenger movements was estimated at 8% compared with the year ended September 2006.

International

In the Northern Winter 2007–08 scheduling period (November to March), international inbound seat capacity to Brisbane is estimated at around 47,500 seats per week, a level similar to the same period last year.

In terms of capacity, the major airlines serving Brisbane are Qantas, Singapore Airlines, Air New Zealand and Emirates.

There were over 4 million international passenger movements at Brisbane Airport in the year to December 2007 (2 million arrivals), which was growth of 4% on the previous year. The busiest city pairs were Auckland–Brisbane, Singapore–Brisbane, Christchurch–Brisbane, Tokyo–Brisbane and Hong Kong–Brisbane.

International inbound seat capacity to Brisbane is experiencing growth, with the following capacity changes:

- Etihad Airways has introduced a 3 times weekly Abu Dhabi–Singapore–Brisbane service in late 2007
- Singapore Airlines is building the frequency of its Singapore–Brisbane services from 14 to 17 per week in April 2008 and to 21 in July 2008
- Royal Brunei Airlines has introduced 3 new services per week from Bandar Seri Begawan
- China Eastern operated a Shanghai–Brisbane service (triangulated with Melbourne) twice per week; between November 2007 and February 2008
- Qantas will grow its current 5 times weekly service from Los Angeles to a daily frequency in March 2008
- Korean Air is providing additional capacity to Brisbane, having grown the frequency of its services from Seoul to 5 per week
- Emirates will add a second daily direct service to Dubai from September 2008

Roma Street Parklands

[10] *Year ending December 2007 data not available at time of printing.*

4.2.2 Destination Branding, Target Markets and Marketing Activities

Brisbane Marketing (BM), Tourism Queensland (TQ) and Tourism Australia (TA) in partnership with the local tourism industry, undertake marketing activities for the Brisbane destination. The aims of recent marketing activities for the Brisbane destination and an overview of their activities are presented in this section.

Strategic Direction

The primary aims of Brisbane destination marketing campaigns are to raise awareness of the destination and the activities on offer, and to stimulate interest in and desire to travel to the destination. In addition, other aims of the campaigns are to educate visitors as to the actual location of the destination and the different methods of transport available. The core positioning strategy for the Brisbane destination is to differentiate the destination from its key competitors (other city–based experiences, e.g. Sydney, Melbourne and Perth), by establishing a distinctive and attractive brand based on its attributes, experiences and appeals. While campaigns may target specific markets, it is essential that the overall brand platform provides a unified, overarching theme for all destination development and marketing activities.

Riverside Centre, Brisbane

Domestic Marketing

BM, TQ and the tourism industry work together to implement a marketing strategy designed to enhance the domestic leisure marketing of the Brisbane destination. Following the successful launch of the new Brisbane destination campaign in 2005, BM has undertaken a strategy of targeting the interstate markets while TQ's activity primarily focuses on attracting the regional Queensland and Northern New South Wales markets.

Within these markets, BM and TQ have conducted targeted brand activity in media such as television, cinema, print, radio and online. In addition, the marketing efforts have included a range of tactical cooperative initiatives and partnership advertising opportunities for industry participation.

Brand Position

BM launched its new Brisbane destination campaign and creative in 2005. The campaign was designed to challenge outdated perceptions of the destination, and initiate positive brand development in the key interstate markets of Sydney and Melbourne. The campaign includes the *Not Just a Sleepy Little Town* commercial, which demonstrates the urban, cultural, leisure and natural experiences that set the Brisbane destination apart from its competitors. Print, outdoor and online brand executions were also developed, along with cooperative templates for operator activity.

Brisbane

Appeals, Attributes and Personality

The main attributes and appeals of the Brisbane destination are:

- Youthful and creative
- Fun and carefree
- Enthusiastic
- Up and coming
- Outdoor and active

BM and TQ will work with tourism, business and other key stakeholders in 2008 on a refresh of the Brisbane destination brand's direction and subsequent creative. This project aims to assist in establishing a compelling proposition to unite the destination.

Target Markets

In 2006, TQ and key partners adopted a revised targeting strategy based on a household lifecycle segmentation approach. This information has been used to identify target markets that represent the greatest opportunity for growth and development for the Brisbane destination.

Segmentation Approach

Identification of the most suitable target markets is primarily based on household composition. This, when combined with appropriate market intelligence, provides a reliable method of predicting travel behaviour among like–minded groups of people. Other considerations in identifying the key segmentation for the Brisbane destination were potential travellers' stated preference for holiday destinations, past and future travel behaviour, place of residence and income.

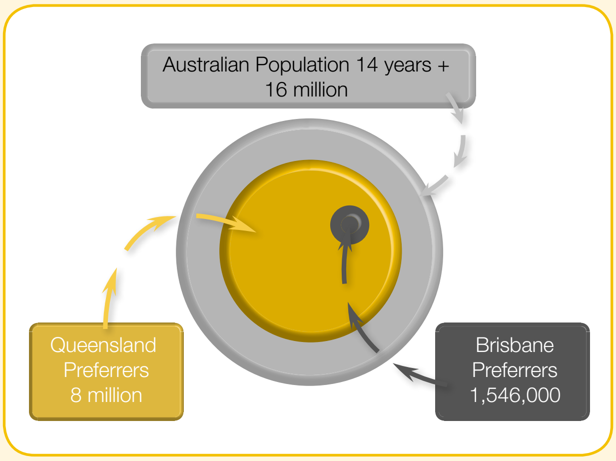
The data is derived from the Holiday Tracking Study (HTS) conducted by Roy Morgan Research. In the year ending June 2005 a total of 23,500 interviews were conducted nationally with Australians regarding their holiday plans. The data is then weighted to represent the population of Australian residents aged 14 years and over (16 million people). Estimates of segment size are guides only, based on the year ending June 2005 HTS.

Queensland Preferrers are those leisure travellers (holiday and visiting friends and relatives (VFR)) who state they would like to visit Queensland for at least one night for a holiday in the next two years.

Brisbane Preferrers are those leisure travellers (holiday and VFR) who state they would like to visit the Brisbane destination for at least one night for a holiday in the next two years.

Size of Target Markets

In the year ended June 2005, one in two Australians aged 14 or more years (8 million people) nominated Queensland as a place they would like to visit, for at least one night, in the next two years. Over one and a half million Australians nominated Brisbane as a destination they would like to visit, for at least one night, in the next two years. The core target markets are young singles and couples and two income midlife households in Sydney, Melbourne and regional Queensland.



Source: Roy Morgan Research – Holiday Tracking Survey (HTS), Year Ending June 2005


Moreton Island

A review of the segmentation of the market in 2006 identified two target markets for the Brisbane destination based on current preferrers, type and length of trip:

Young Singles and Couples (18–44 years)	Mid–life Households (45–64 years)
Studying or degree qualified, working part–time	Baby Boomers, two income households
Living in shared households	Living with partner and older kids
Stylish, active, and environmentally conscious	Rational, stable, and slightly conservative
Focus on social life, technology and new experiences	Want to sightsee and experience different things
Visit Brisbane for stylish holidays with ‘big lights’, ‘big cities’ or events	Visit Brisbane to seek out unique offerings, 3+ nights
Selective TV watching, light newspaper readers, heavy internet users, frequent cinema goers, frequent radio listeners	*Moderate TV watching, heavy newspaper readers, love magazines, moderate internet users, light radio listeners*

Both segments are busy and hard to connect with, so targeted media is key with a focus on what makes an impact and encourages involvement.

Primary Target Markets

The following target markets, identified through a combination of consumer research (HTS) and market intelligence, represent the core consumers who have the most potential to convert into visitors to the Brisbane destination, and therefore the most likely to provide a positive return on investment in marketing activities. The key areas visited are Brisbane City and Surrounds. Brisbane’s Moreton Bay and Islands and the Scenic Rim have been identified as emerging destinations for these markets.

Segment		Characteristics					Size of Segment	
Lifestage	**Source Market**	**Age**	**Household Income**	**Travel Party**	**Transport**	**Type of Trip**	**QLD Preferrers**	**Brisbane Preferrers**
Young single/ couple	Sydney Melbourne	18–44 years	$60,000 or more	Couple or alone or with family/ friends	Car Fly	Short break or two weeks	263,000 (5% of Interstate QLD preferrers)	54,000 (5% of Interstate Brisbane preferrers)
Mid–life household	Sydney Melbourne	45–64 years	$80,000 or more	Couples or with family/ friends	Car Fly	Short break	327,000 (6% of Interstate QLD preferrers)	56,000 (5% of Interstate Brisbane preferrers)

Secondary Target Markets

The secondary target markets are the main source of current visitors to be maintained and their length of stay increased through marketing and development activities. This is the core market for the Greater Brisbane Country and Brisbane's Moreton Bay and Islands destinations.

Segment		Characteristics					Size of Segment	
Lifestage	Source Market	Age	Household Income	Travel Party	Transport	Type of Trip	QLD Preferrers	Brisbane Preferrers
Young single/ couple	Queensland or Northern NSW	18–44 years	$60,000 or more	Couple or alone	Car Fly	Short break	229,000 (9% of intrastate QLD preferrers)	49,000 (12% of Intrastate Brisbane preferrers)
Mid–life household	Queensland or Northern NSW	45–64 years	$60,000 or more	Couple or alone	Car Fly	Short break or 1–2 weeks	264,000 (11% of Interstate QLD preferrers)	41,000 (10% of Interstate Brisbane preferrers)

In addition to the lifecycle and geographic segmentation, the Brisbane destination is targeting visitors seeking a range of established and emerging experiences.

Established experiences	Emerging experiences
Art galleries and cultural precincts	Working backpackers
Urban escapes	Adventure tourism
Restaurants, shows, concerts	Sports tourism
Professional sports events	Volunteer tourism
Events, conventions and business	Nature–based tourism
Education	Marine tourism (e.g. yachting, fishing)

The insights from TQ's 2007 segmentation study will be taken into consideration for future communication, particularly in relation to key messages and media vehicles used.

Intrastate Marketing Activities

Local Marketing

BM continues to implement its Brisbane destination retail strategy, with Brisbane residents and the 500km driving radius as the target markets. The strategy aims to build a connection between consumers and the city (Queen Street Mall, Fortitude Valley and Stones Corner) and suburban retail precincts, with brand and marketing strategies reflecting each retail precinct's unique selling point. The strategy highlights the motivations for visiting Brisbane City, such as shopping, dining, recreation, culture and Brisbane nightlife. Through the strategy, Brisbane residents are also encouraged to visit regional Brisbane areas, such as Brisbane's Moreton Bay and Islands and the Scenic Rim.

Brisbane City and Surrounds

Marketing of Brisbane City and Surrounds has included comprehensive campaigns in target leisure, business and visiting friends and relatives markets, with the primary aim of increasing preference and intention to travel to the destination, particularly on weekends. With a focus on increasing short breaks, marketing activities have primarily targeted families and couples aged over 35 years in regional Queensland and Northern NSW. The positioning of the destination is based on promoting the Brisbane destination as a modern and diverse subtropical metropolis, offering visitors a stimulating capital city experience in a warm, friendly and relaxed environment. The advertising message conveyed the key motivations for travel to the Brisbane destination, including significant events, entertainment, shopping, dining, cultural arts, and activities. The media plan has been structured to provide this market with an ongoing 'drip feed' of Brisbane destination information and imagery.

Brisbane's Moreton Bay and Islands

Marketing for Brisbane's Moreton Bay and Islands has been undertaken in partnership between BM, the four councils of Brisbane, Caboolture, Redcliffe and Redlands, TQ and industry. In early 2006, for the first time a dedicated campaign was conducted to promote the coastal component of the Brisbane City and Surrounds sub–destination and Brisbane's Moreton Bay and Islands, to the regional Queensland and Northern NSW markets. A follow–up campaign was run in March 2007 with a value of $80,000 supported by industry, BM, the Moreton Bay Taskforce and TQ.

Greater Brisbane Country

Under the 'Get out of Town' tagline, the Tourism Advisory Group Greater Brisbane has undertaken promotion of Greater Brisbane as well as the Scenic Rim and Country Valleys sub–destinations. In a national and international context the area is considered to be part of the overall Brisbane destination experience, offering day trip options out of Brisbane City. From a local perspective the area is promoted heavily to the large Brisbane market as an attractive day trip or short break option. This sub–destination also sits within and benefits from, the South East Queensland Country (SEQC) destination marketing program. For further information on the marketing activities for this area refer to the SEQC Destination Management Plan **www.tq.com.au**

Interstate Marketing Activities

BM's charter has been to promote Brisbane as a desirable destination for leisure and business. Between 2003 and 2005 it focused mainly on the local Brisbane and regional Queensland markets. Upon a re–assessment of the organisation's objectives, BM commissioned research and extensive investigation into the interstate market which showed that many people in the southern states have outdated perceptions of the Brisbane destination. In 2005, BM launched a multi–media awareness campaign aimed at changing these perceptions in the Sydney and Melbourne markets as part of a long–term strategy for the city of Brisbane and the Greater Brisbane sub–destination. The campaign is a joint initiative of the Brisbane City Council, the Queensland Government and BM.

Somerset Dam

The campaign depicts Brisbane's unique and modern lifestyle using Brisbane destination experiences such as the Brisbane Powerhouse, Moreton Bay, the Queen Street Mall, Fortitude Valley, South Bank Parklands, Kangaroo Point Cliffs, live music venues and the Brisbane River. In 2005–2006, the campaign activity included television advertising supported by an extensive print media activity in national magazines and newspapers.

Campaign results through the 2006 AC Neilsen Advertising Tracking research for BM included:

- Since the campaign launch, unprompted awareness of Brisbane destination television advertising activity increased four–fold in the Sydney and Melbourne target markets
- When Sydney and Melbourne interviewees were given a description of the advertisement, 31% had seen it and of those that had seen it, 50% clearly remembered that it was an advertisement for Brisbane
- Amongst the Sydney and Melbourne markets, the television advertising is extremely well liked, with 64% or respondents stating they either liked it very much, or liked it a little.

The National Visitor Survey (NVS) results in March 2007 compared to March 2006 show a 12% increase in visitation from both Sydney and Melbourne residents, along with increasing length of stay and expenditure. These impressive results in the leisure market were supported by an almost 16% increase in business tourism. Nationally, Brisbane is ranked fourth in terms of visitor expenditure.

The next phase of the campaign (2008–2011) will see a revitalisation of the campaign creative and an evaluation of the brand architecture to encourage greater participation from industry partners both in tourism and in business.

Media and Publicity

To complement all marketing campaigns, TQ and BM work with industry partners to undertake comprehensive and ongoing publicity initiatives designed to increase positive editorial coverage for the destination.

Domestic media interest for the Brisbane destination is more challenging than other holiday destinations. This is largely due to the perception from media that Brisbane is not seen as a holiday destination. However, new products such as Story Bridge Climb and Riverlife and places like Brisbane's Moreton Bay and Islands provide good quality story leads and new product information. It is important to note that the media activity for the country areas surrounding Brisbane city and Ipswich is undertaken as part of the SEQC Destination Management Plan. All media opportunities are assessed on a case–by–case basis in consultation with the Regional Tourism Organisation (RTO) and in line with the marketing objectives outlined in this Destination Management Plan.

Key media and publicity activities undertaken for the Brisbane destination have included:

- Assistance to all major media outlets, such as television lifestyle shows, metropolitan and regional newspapers and magazines
- A series of media functions held in Brisbane, Sydney and Melbourne including the coordination of a Queensland Media Information Exchange
- Media releases, feature stories and Fact Sheets are placed on the TQ media website and are regularly updated
- New product information, events and feature stories are placed on the New Tourism media e–news and distributed monthly to a comprehensive national media database

The Brisbane destination has been making headlines attracting national media valued at more than $18.5 million, from almost 280 positive stories in 2006–07. This is a conservative estimate and only accounts for publicity generated from TQ involvement that has been collected through our media monitoring services.

International Marketing

This section provides an account of the international marketing activity that has been undertaken for the Brisbane destination and describes the context in which the international marketing of Queensland's destinations has taken place. It identifies the key players in international marketing, including the role of TA and how TQ, the RTOs and tourism operators contribute to the promotion of the destination in key international source markets.

The Brisbane destination has led the growth in international visitors and visitor nights in the year ended December 2006 with a 23% increase in visitor nights, driven by holiday visitor nights (up 31% over the same period). This growth is a result of growth in the United Kingdom (up 10%), Japan (up 23%) and China (up 25%). Brisbane received 41% of Queensland's international visitors.

Strategic Direction

The Brisbane destination is positioned internationally under the umbrella brand of "Southern Queensland". Designed to provide a more compelling proposition to international trade networks and consumers in long–haul markets, Southern Queensland is a partnership of the developed destinations of Brisbane, Gold Coast, Sunshine Coast, and Fraser Coast with the emerging destination of SEQC. The concept of Southern Queensland is supported by TQ, TA, RTOs, and local government, along with key industry partners.

The primary objectives of the Southern Queensland campaign are to:

- Increase consumer's awareness and preference of Southern Queensland in selected international markets, primarily through media and public relations, online activity and limited direct consumer activity
- Increase exposure of Southern Queensland in international trade programs to broaden appeal and saleability of the sub–destinations (Brisbane, Gold Coast, Sunshine Coast, Fraser Coast and SEQC)
- Develop new innovative marketing campaigns under the Southern Queensland umbrella to increase length of stay and dispersal in the destination

Through the TQ International Office in New Zealand, Brisbane has been profiled to visitors from New Zealand through a dedicated consumer based magazine, inserted into a daily newspaper twice in the past two years. Activity in the New Zealand Market will be reviewed as part of the broader Southern Queensland Strategy. At present, New Zealand is the only international market in which the Brisbane destination undertakes marketing activity.

Positioning Statement

Southern Queensland offers the best of all the Australian experiences in the real Australian outdoor lifestyle, delivering beaches, islands, cities, journeys, rainforest and access to the Southern Great Barrier Reef.

The key attributes of the destination providing a distinctive and compelling reason to visit Southern Queensland include:

- Australian wildlife and nature (flora and fauna)
- World Heritage–listed Gondwana Rainforests of Australia and Fraser Island
- The Australian beach culture
- Australian relaxed lifestyle – food and wine, journeys, Australian cities

Country and Horse Festival, Beaudesert

Tourism Australia's Segmentation Approach

TA has recently moved to targeting the "ideal visitor" and has adopted a segmentation approach based on "Experience Seekers" (please refer to **www.tourism.australia.com** for more information). As TA's core communications are directed towards "Experience Seekers", TQ works closely with TA to match the experiences offered by Queensland's destinations with the appropriate market segment.

Self Challengers	Comfort Adventurers (including Cultural Explorers and Comfort and Learning)	Luxury Seekers (includes Cocoon Travellers, Travel in Style and Sightseers)
Travel fulfils an inner drive to challenge themselves and the reward is intensely personal	Seek to experience the unique and unusual without comprising their creature comforts	Superior holiday experiences are personally satisfying and affirm their status as travellers

Target Markets

The primary target markets for Southern Queensland are the following countries:

- United Kingdom
- Germany
- France
- Italy
- United States

Potential markets include:

- Japan
- Korea
- Singapore
- New Zealand

International Segmentation for Southern Queensland

Southern Queensland currently receives approximately 1,633,000 international visitors annually and therefore the international market presents significant opportunities. The following international target segments, identified through a combination of TA segmentation research and market intelligence, represent the core consumers who have the most potential to convert into visitors to the Brisbane destination and therefore, the most likely to provide a positive return on investment in marketing activities.

Target Markets[11]	Size of Market to Southern Queensland	Opportunity	Target Segments
United Kingdom (UK)	217,000	Increasing the profile and awareness of the experiences offered by Southern Queensland	Self Challengers Comfort Adventurers Cocoon Travellers
Europe (ex UK and Germany)	154,000	Increasing the profile and awareness of the experiences offered by Southern Queensland	Experience Seekers
United States of America	89,000	Increasing the profile and awareness of the experiences offered by Southern Queensland	Travel in Style Self Challengers
Germany	54,000	Increasing the profile and awareness of the experiences offered by Southern Queensland	Cocoon Travellers Comfort and Learning Self Challengers

[11] Source: Tourism Research Australia International Visitor Survey, year ended 2006. NB: Southern Queensland includes the Darling Downs, Gold Coast, Brisbane, Sunshine Coast and Hervey Bay/Maryborough regions.

Potential International Market Segments

The following potential international target markets have been identified through market intelligence as potential long–term opportunities for increased visitation to Southern Queensland.

Target Markets	Opportunity	Target Segment
New Zealand Korea Japan Singapore	Increasing the profile and awareness of the experiences offered by Southern Queensland	Experience Seekers

International Marketing Activities (2004–2006)

TQ's international marketing activity complements the marketing undertaken by TA and is focused on developing strategies and activities in the areas of consumer marketing, trade marketing, online marketing, media and public relations and airline partnerships. These activities are developed with the RTOs where appropriate. TQ works to convert TA's themed experience messages into saleable product through the promotion of Queensland's destinations, products and experiences.

The Brisbane destination is not promoted in the same way in each country of source market. The prioritisation and level of activity in public relations trade missions and in joint initiatives with TQ international offices to undertake consumer direct promotions varies by country. The table below examines the activities by source market.

Country	Public Relations/ Familarisation Support in Brisbane	Trade Activities	Consumer Activities
New Zealand	🕒	🕒	🕒
United Kingdom	🕒	🕒	🕒
Europe (ex UK and Germany)	🕒	🕒*	
United States of America	🕒	🕒	🕒*
Germany	🕒		
Korea	🕒	🕒*	
Japan	🕒		
Singapore/Malaysia	🕒	🕒	
India	🕒	🕒*	
Middle East	🕒	🕒*	
China/Hong Kong/Taiwan	🕒	🕒*	

* *through the Southern Queensland alliance of operators, Brisbane Airport Corporation and Southern Queensland Tourism*

International marketing activities for the Brisbane destination generally occur in the context of the broader Southern Queensland destination. Future international marketing activities will be developed for Brisbane under the Southern Queensland brand umbrella.

Key Activities

The key activities planned for 2008–2011 Southern Queensland International marketing campaign include:

- Definition of target market
- Cooperative marketing
- Packaging – including fly/drive and fly/cruise
- Trade training familiarisation program for Inbound Tour Operators
- Media and public relations activity
- Development of a Southern Queensland touring route

Cooperative Marketing Approach

The Local Tourism Organisations, RTOs, TQ and TA work in partnership to assist tourism operators to participate in international marketing and promotional activities. The level of international marketing is dependent on each destination's capacity and readiness to position itself in the international market place. For example, a destination with a high capacity and readiness for inbound tourism might aggressively promote its own destination brand internationally, whereas other destinations would achieve greater success marketing themselves internationally under the strong umbrella of 'Brand Queensland', the whole of State brand.

Media and Publicity

To complement all marketing campaigns, TQ and BM work with industry partners to undertake comprehensive and on–going publicity initiatives designed to increase positive editorial coverage. Media and publicity continues to be the most cost–effective method of reaching consumers in the international marketplace.

Media and publicity in the international market place takes the following forms:

- Visiting journalists program (VJP) from target markets – these activities are developed in partnership with TA, TQ, BM and industry partners
- Outbound public relations program – a series of releases and media snippets are produced and distributed around the world promoting experiences and products in the destination
- TQ missions – media calls are becoming a regular feature of all TQ missions
- Foreign correspondents – working with local journalists and freelancers who sell stories to overseas publications
- Providing images and footage to support media activities of international publications
- In–market promotions and innovative programming (i.e. reality programs) filmed in Australia

These activities are underpinned by strong industry support and investment with regard to hosting, escorting and co–ordination.

Sirromet Winery, Mt Cotton

4.2.3 Destination Development and Tourism Services Analysis

The Brisbane destination is well serviced by general infrastructure and has experienced a steady growth in tourism since 1995. However, pressures of population growth, particularly relating to road and transport linkages, will need to be monitored. The development and promotion of appropriate product and capital city experiences will assist in overcoming perceptions of Brisbane as a gateway rather than a destination.

Based on research and consultation with industry, state and local government, this section provides an overview of the initiatives undertaken to implement the previous Destination Management Plan (DMP) between 2004–2006, and current tourism development and services provided in the Brisbane destination. A full analysis of tourism services is provided below.

Key Destination Development Initiatives

Accommodation

- The new Emporium Hotel opened in May 2007. The hotel offers 106 luxury studio suites, and is the first hotel of its type in Brisbane **www.emporiumhotel.com.au**
- Accor purchased the Goodearth on Wickham Terrace, and will soon begin an extensive $5 million refurbishment of the property renovating all of the rooms and public areas. Under the new Accor management agreement, the hotel will be known as Terraces on Wickham **www.terracesonwickham.com.au**
- The Saville at Southbank was completed in 2006, which was a $90 million development

Events and Festivals

For growth and development of special events, Tourism Queensland's (TQ) works closely with Queensland Events Corporation (QEC), the main body responsible for attracting, developing and hosting major events in Queensland. Activities include:

- Working with a range of stakeholders to ensure tourism opportunities are considered for events
- Maximise benefits before, during and after an event through strategic partnerships with major event organisers, corporate sponsors, the community and media
- Conduct workshops aimed at providing assistance to regional event organisers, Regional Tourism Organisations (RTOs) and local authorities for attracting media coverage of events
- Assist in raising the profile of key events and festivals through media activity
- Encourage event organisers to list their events and festivals in the Australian Tourism Data Warehouse (ATDW) so there is one primary database of events in Queensland accessed via regional, national and international websites

Key activities include the 2006 Events Season Campaign, a partnership between Brisbane Marketing (BM), TQ and the Department of Premier and Cabinet to undertake a $500,000 marketing campaign to increase awareness of events in South East Queensland, including the Bledisloe Cup and Brisbane Festival complementing activities already underway by BM and the Department of Premier and Cabinet targeting Sydney, Melbourne and New Zealand. Other key events include the Andy Warhol exhibition, Phantom of the Opera, the 2008 Bledisloe and the Rugby League World Cup.

Tourism Information and Services

- Re–development of the Queen Street Mall Visitor Information Centre, incorporating new touch screen technology and online booking facility

Transport

- The Brisbane Cruise Terminal at Portside Wharf was opened in mid 2006, with an additional $213 million in improvements to the Port of Brisbane facility to commence in 2007–2008. Brisbane is a key destination for cruise ships visiting Queensland or operating in the State
- The Green Bridge is the first bridge in Australia designed exclusively for buses, pedestrians and cyclists. Various bus services will link to the Green Bridge to transfer those utilising the bridge to the City, South Bank, Garden City, Holland Park West, Greenslopes, Buranda, Carindale and the University of Queensland. The Green Bridge opened in 2007
- Air access is growing rapidly to the Brisbane airport with domestic and international arrivals up 9% and 7.6%, respectively (April 2006 to April 2007). This will be boosted by new services including Brisbane–Osaka (Jetstar), and Brisbane–Abu Dhabi (Etihad).

Product Development

- The Queensland Art Gallery opened its second building, The Gallery of Modern Art at South Bank on the Brisbane River in November 2006. The two–site Queensland Art Gallery will become the second largest public art museum in Australia. The existing Queensland Art Gallery will also undergo some refurbishment, with the construction of a new entrance onto a public plaza, which will link the two gallery sites, the State Library of Queensland and the Queensland Museum **www.qag.qld.gov.au**
- The Portside Wharf and dining precinct opened in mid–2006 featuring 400 luxury residential apartments, restaurants, retail, fresh food market, a wellness centre, cinemas, function centre and a destination for cruise ships and superyachts
- A number of apartment style corporate hotels opened including the Story Apartments targeting the business market

The Department of Infrastructure and Planning has recently commenced a number of projects including the construction of the $9 billion South East Queensland (SEQ) Water Grid, implementation of the SEQ Infrastructure Plan and Program 2007–2026 (outlining $82 billion of infrastructure in SEQ), and the management of a major private sector development opportunity for North Bank (estimated project cots $1.75 billion).

International Market Development

TQ and TA have been developing an umbrella brand called "Southern Queensland" for the long–haul international markets. Once in place it will provide many opportunities for Brisbane destination operators who are ready to begin targeting actively the international market.

Tourism Services Analysis

This section outlines the existing tourism services available in each of the Brisbane sub–destinations and identifies gaps based on research, consultation and field experience. The following information provides a general background on the experiences and services available within each sub–destination and is supported by the Strengths, Weaknesses, Opportunities and Threats Analysis which identifies key areas of focus for the coming three years (2008–2011).

Brisbane City and Surrounds

Accommodation – As accommodation demand has caught up with supply in recent times, all accommodation types have been trending upward since December 1998. However, Brisbane City and Surrounds has the lowest average room rates of all Australian capital cities. Commercial accommodation experiencing high occupancy levels has prevented accommodation refurbishment and there is a trend towards corporate hotels specialising in self–contained apartments. Despite this, there is still a good range of accommodation for the capital city experience (e.g. Story Apartments). Saville Southbank, the newest deluxe hotel in Brisbane city in seven years, opened its doors in January 2006. Saville, a $90 million development including deluxe apartment hotel with 161 rooms, sits in the city's premier leisure precinct, South Bank. Emporium Hotel in Fortitude Valley opened in June 2007, and is Brisbane's newest boutique hotel. The hotel offers 106 studio suites, set in contemporary and elegant surrounds. There is also new tourism accommodation product being developed that fits the brand image.

Natural and Built Attractions – Brisbane City and Surrounds offers a range of significant built attractions (e.g. museums and galleries, South Bank Parklands, Treasury Casino, Queensland Performing Arts Centre (QPAC), Gallery of Modern Art (GoMA), Brisbane Entertainment Centre) and exhibition and sporting venues. It also has established and growing cultural precincts (e.g. Fortitude Valley, James Street, South Bank, West End, Rosalie, Paddington) and new adventure tourism products (e.g. Story Bridge Adventure Climb, Riverlife) entering the market. The city also has natural spaces including forests and wetlands, e.g. Brisbane Forest Park, Boondall Wetlands, Botanical Gardens, New Farm Park and Roma Street Parklands. There is an opportunity to better package natural and built attractions, reflecting the intrinsic and distinct qualities of Brisbane to national and international visitors.

Tours and Activities – Brisbane City is well serviced in capital city recreational tours and activities. There are a number of tours including art, cultural, soft adventure, adrenalin, heritage and nature which package all of the different attractions and activities that are offered by the city and surrounds. The city has well known favourite recreational activities for live arts, situated at the QPAC, Brisbane Powerhouse Centre, the Judith Wright Centre for Contemporary Arts and South Bank. The Story Bridge Adventure Climb, which opened in 2005, is a soft adventure experience with a difference and the most spectacular way to discover Brisbane. The Story Bridge, built in the 1940s, is one of Brisbane's most treasured landmarks. In addition to this the Riverlife Adventure Centre which is located on the banks of the Brisbane River and beneath the Kangaroo Point Cliffs also opened in 2005. Activities in this centre including abseiling, rock climbing, kayaking, and canoeing minutes from the city centre.

Access, Transportation Services and Facilities – Brisbane city enjoys all the benefits of a capital city in terms of domestic and international air access, road, bus and rail access. It hosts a modern international and major domestic airport situated within 14 kilometres of the CBD, a modern rail network and an extensive urban river public transport system. However, the growing congestion of road access to and from the airport needs to be addressed as the population continues to expand. The CBD is well serviced by the existing road network however appropriate tourism signage is still a challenge for industry and key government agencies. Brisbane City Council (BCC) has recently undertaken an audit of its directional and interpretative signage and it is implementing the recommendations. Directional and interpretative signage has been erected at Roma Street terminal and other major access routes. While there is new directional signage in the city highlighting the transport nodes, there are opportunities for further integration, including better coordination between local government and state agencies responsible for signage.

A concept design has been developed for Airport Link, a mainly underground toll road that will connect the North–South Bypass Tunnel, Innercity Bypass and local road network at Bowen Hills to the northern arterials of Gympie and Stafford Roads at Kedron and Sandgate Road, and the East–West arterial in the north–east.

Rivergate located on the Brisbane River has opened stage one of marina berths and its service centre for the superyacht industry. The marina has 104 deep water berths and access for superyachts, service berth, maintenance hardstand and dry boat storage facility with another allotment of berths along with a retail precinct outlined for future stages.

A $22 million investment into the continued development of the cycling network in SEQ will result in a new cycleway linking Normanby to the Roma Street Parklands.

Improvements to the Ipswich Motorway to the value of $384 million will see the upgrade of the motorway to six lanes between Wacol and Darra, the reconstruction of the Centenary Highway Interchange, and an upgrade of the Gailes interchange. An investment of $2.3 billion has also been assigned to the construction of a six–lane Goodna bypass from Dinmore to the Logan Motorway at Gailes.

Planning and construction of the new Houghton Highway Bridge between Brighton and Redcliffe will commence during 2007–2008, a $55 million investment.

Citytrain will provide additional services between Brisbane city and the Gold and Sunshine Coasts as a result of $104 million in funding by the Department of Transport.

Events and Festivals – While Brisbane has been a host to several significant events in the past decade (e.g. Olympic Soccer, Goodwill Games, Rugby World Cup) the city has no established national or internationally significant regular events and has a below average share of the special events and festivals market. The city has the necessary infrastructure in place to support the staging of most events of national and international significance. The QEC works with other State Government agencies to attract national and international events to the Brisbane destination.

Hospitality and Retail Services – The existing hospitality services are appropriately positioned to meet the needs of visitors, and a number of retail hubs exist in Brisbane city and surrounds offering a range of shopping experiences, including Queen Street Mall, Fortitude Valley and Stones Corner. City and inner city hubs, including the central business district, riverside precinct, South Bank and Fortitude Valley offer visitors a range of shopping, restaurant, café and nightclub experiences augmented by a number of established suburban precincts. June 2005 marked the opening of Brisbane's largest CBD shopping centre in 15 years when the flagship $400 million, three level Queens Plaza opened on the Queen Street Mall. There are also a growing number of suburban shopping precincts that support the local visiting friends and relatives (VFR) market. An example of this is Direct Factory Outlets (DFO) opened in 2005 located near the Brisbane Airport, which brings a new and exciting style of shopping to the retail scene in the sub–destination, with over 90 individual outlets under the one roof. The quality of retail services needs to be maintained as shopping is a popular visitor activity within the capital city experience.

Visitor Information Centres (VICs) – There are accredited VICs in the Queen Street Mall and the International and Domestic Airports, and tourist information is freely available. These centres are open seven days a week, providing visitors with a range of tourism information and services including tour and accommodation bookings free of charge.

Industry and Community Engagement – Through the RTO, regular community and industry forums are run to ensure input to the direction of the tourism marketing and development. This includes the Brisbane Leisure Advisory Group (BLAG) that meets quarterly.

Brisbane's Moreton Bay and Islands

Accommodation – The predominant market for Brisbane's Moreton Bay and Islands is the day trip market, however the short break sector is now also growing due to the increase of accommodation available including the newly opened Stradbroke Island Resort Hotel. The satisfaction of accommodation remains high, with a variety of tourist accommodation available at an affordable cost. However, there is limited accommodation choice on the mainland, including a lack of adequate camping facilities, lack of self–contained accommodation in caravan sites, and limited top end and boutique accommodation, with only one true resort style property on Moreton Island. More development is also required to develop accommodation packages for the international market.

Natural and Built Attractions – The natural environment of Moreton Bay, which includes sand dunes, drift sand islands, reefs and a range of ecosystems, home to dugongs, dolphins, whales and turtles, provide a unique coastal experience. Marine life and park experiences are abundant in the area, with whale watching being the major attraction. The islands and areas like Pumicestone Passage are key nature–based tourism assets. Boondall Wetlands offers bird watching, bikeways and canoeing experiences, Stradbroke, Peel and St Helena Islands offers attractions of historical Indigenous significance, while koalas and other fauna feature on the mainland. However, there is a lack of critical mass of built attractions, lack of accessibility to the attractions and limited consultation between managers of protected areas i.e. Queensland Parks and Wildlife Service, marine park rangers.

Attractions, Tours and Activities – The Brisbane's Moreton Bay and Islands area has a range of activities, largely focused on the natural environment. These include day tours, diving, charter boat hire and picnicking, and most activities available on the bay are affordable. On the mainland a number of new tours are emerging including tours based around food and wine (Sirromet Winery), history and outdoor pursuits. Dolphin feeding tours, in terms of appeal and distribution, attract a large number of visitors. However, there is a lack of support for commercial operators through regulatory environment bodies and also poor trade distribution and trade linkages. Limited coordination of activities, the unreliability of operating hours, and inconsistency of booking service are also areas that require improvement.

Access/Transportation Services and Facilities – Currently access to the islands is good, with a bridge to Bribie Island and regular barges and water taxis to other islands, which are a part of the experience. There is good access to Moreton and North Stradbroke Islands on the vehicular barge, and the regular water taxi services and barge provide access to the Southern Moreton Bay Islands. In addition there is a bus service on both Bribie and North Stradbroke Islands, however these services can be unreliable at times and expensive. There is good destination access in terms of proximity to the capital city and the Domestic and International airports. However, there are a lack of amenities at ferry terminals and complicated public transport options linking islands within the bay. There is inadequate access within the area for those in wheelchairs or with disabilities. Also, the impact of regulation on alternative locations must be considered. For example, restrictions on camping sites on one island will place extra stress on neighbouring islands.

The completion of the million–dollar renewal of Bribie Island Recreation Area has resulted in an upgrade to the area's facilities and services. Aimed at the nature–based tourist, new features include the Ocean Beach campground, a 22km forest drive and a new walking track to Fort Bribie.

A new management plan has been completed, designed to protect Moreton Island's natural and cultural values in the long–term. The major projects to be implemented under the Environmental Protection Agency plan include a campsite reservation system, appropriate campsite signage, and vehicle 'go slow' and beach safety zones.

There is limited signage to, within and across the sub–destination, limited interpretative signage and no sense of arrival into the sub–destination. An audit of signage would be worthwhile to assess signage requirements.


Tangalooma Wrecks, Moreton Island

Events and Festivals – The events in this sub–destination generally have a local appeal, as there is a lack of iconic events. However, there are a range of sporting events including sailing regattas, fishing competitions and surf life saving competitions, as well as arts and cultural festivals. Brisbane to Gladstone Yacht Race and the Sirromet Wine and Food Festival attract a large number of visitors. There are also a number of emerging events within the sub–destination, including the Moreton Bay Seafood Festival, Manly Harbour Rhythms, Redcliffe Sails Festival, and the Redland Spring Festival. However, there are varying levels of event coordination, and there is limited linkage of events with attributes of the sub–destination.

Visitor Information and Services – There are a number of accredited VICs in the Brisbane's Moreton Bay and Islands sub–destination. However, the VICs could be of better quality by improving their technology and better showcasing of their destination. They are also subject to long–term sustainability constraints due to relying on local government funding and their volunteer support base.

Industry and Community Engagement – Through the RTO, regular community and industry forums are run to ensure input to the direction of the tourism marketing and development. This includes the Tourism Advisory Group (TAG) that meets quarterly, and the Moreton Bay Task Force.

Greater Brisbane Country

Accommodation – Existing levels of accommodation are adequate for the current level of overnight visitation, as the primary visitor market is day trips. There is adequate motel style and boutique accommodation in all areas. Consistency of accommodation standards has improved over the last few years. The regulatory environment of the area makes the development of new accommodation difficult. Caravan/motorhome facilities and camping opportunities, particularly in protected areas, are somewhat limited and are an area of concern.

Natural and Built Attractions – Natural attractions are abundant in Greater Brisbane Country including Mt Mee State Forest and Reserve, Brisbane Forest Park, Lake Somerset, Lake Wivenhoe, Springbrook, Mt Barney, Moogerah Peaks National Park, Lake Moogerah and Queen Mary Falls. There are currently limited recreational facilities at these natural attractions, a lack of interpretative signage of natural attractions, and inadequate collateral including maps.

Attractions, Tours and Activities – Natural attractions are abundant in Greater Brisbane Country. The sub–destination is home to World Heritage rainforest, waterfalls, lakes, valleys, mountains, and unique flora and fauna. These support a significant day trip market and boutique accommodation sector along with a growing number of tours and built attractions. This includes recreational facilities from walking tracks in World Heritage areas to four wheel drive trails in regional parks.

Providing for the predominantly self–drive market are scenic drives and themed tourist routes which introduce the self drive visitors to the range of experiences offered throughout the sub–destination. It is a popular destination for day trips within the Brisbane destination for various activities such as country markets, bushwalking, events, and art galleries. Areas for attention include limited tour opportunities, lack of implementation in establishing and marketing drive trails, limited eco–tours and limited linkages between key natural and built attractions, e.g. winery and culture.

Soft and hard adventure activities have thrived in this natural setting, with commercial ventures established for ballooning, sky diving, water based activities (kayaking, canoeing, etc.); tours (day and overnight) and many more. The area also has significant history and heritage attractions including country pubs and a growing arts and culture industry underpinning the growth of shopping villages. The growth in wineries and cellar doors in Greater Brisbane Country has exceeded expectations and creates significant opportunities for future visitation.

Greater tourism development support in areas such as Brisbane's Country Valleys is also required.

Events, Festivals and Conferences – There are some existing events which attract visitors to the sub–destination, including V8 Racing, Woodford Folk Festival, Urban Country Music Festival, Country, Horse and Arts Festivals and the Esk Races. Due to Brisbane City's close proximity, the sub–destination also holds potential to host an international sporting event. The large number of events and festivals across the sub–destination indicates the need for greater coordination in terms of event timing and content.

Access/Transportation Services and Facilities – Road access and conditions are generally good across the sub–destination. However, the lack of internal public transport within Ipswich and its surrounds is affecting tourism at major attractions because it does not meet current consumer demand.

Hospitality and Retail Services – In general, there is a good variety and range of hospitality and general retail services available in the sub–destination. There is an increasing representation of arts and crafts, local fare and products. The sub–destination is known as having rich agriculture and produce. The main issue regarding hospitality services is the inconsistency in the quality of service delivery. In particular, once outside the principal tourism areas, service quality deteriorates and the hours and days of operation are reduced. Improved visitor awareness of operating hours needs to be addressed. The catchment of well trained hospitality staff in Greater Brisbane Country is currently not being accessed.

Visitor Information and Signage – Generally there are good quality VICs within the sub–destination with a strong volunteer base. Despite this, the technology is outdated in most VICs and the tourism education levels of the VIC staff is low. Service and industry skills are varied across the sub–destination. A new VIC has been developed in Fernvale in the Esk Shire, located on the Brisbane Valley Highway. There is also good networking between VICs in this area and to the north (e.g. Nanango).

Industry and Community Engagement – Through the RTO regular community and industry forums are run to ensure input to the direction of the tourism marketing and development. The TAG, Greater Brisbane, meets monthly.

FUTURE DEVELOPMENTS

As at 2008, there are a number of significant developments and tourism projects underway or in the pipeline. For the most up to date information, please contact BM or visit **www.tq.com.au**

Accommodation

- A number of accommodation developments are planned or underway in the Brisbane destination including: Westin Hotel, Royal on the Park, Airport Hotel, Southbank Hotel development, On The Bay Resort (Bribie Island), Stradbroke Island Hotel redevelopment, Russell Island Eco–lodge/conference centre, and O'Reillys Retreat self–contained accommodation
- Two developments at Springfield Lakes – Niche Hotel (one of 20 beautiful hotels of the world) and Six Eagles (self–contained five star accommodation)
- 4.5 star hotel development at Manly Harbour (on site at Royal Queensland Yacht Squadron)
- Caravan and camping facilities are under investigation in a number of areas in Greater Brisbane Country including Esk Shire

Transport and Signage

- The Brisbane Airport, recognised as a world leader in balancing sustainability with growth, has $340 million in developments planned, including the expansion of the existing International Terminal Building, as well as an extension of the terminal's northern concourse
- The North South Bypass Tunnel is part of BCC's Transport Plan and the Lord Mayor's TransApex Vision. It will stretch 5km beneath the inner city, connecting Ipswich Road and the M3 in the south at Woolloongabba to Lutwyche Road and the Inner City Bypass at Bowen Hills in the north. Construction is expected to begin in late 2006 and the tunnel is expected to open in the second half 2010
- The Gateway Upgrade Project is underway, with $1.88 billion committed the construction of a second Gateway Bridge and the upgrade of 20km of road between Mt Gravatt–Capalaba and Nudgee Road. This project will also connect the Moreton Bay Cycleway from Redlands to Bribie Island. The project is due for completion in 2011 **www.mainroads.qld.gov.au**
- The Hale Street Bridge Project will link the Inner City Bypass to the Pacific Motorway, reducing congestion on the other major arterial roads leading in and out of the city
- A second pedestrian bridge has been proposed as part of the North Bank development, linking South Bank and the Gallery of Modern Art to Tank Street and the Roma Street Parklands
- A network of precincts linked by a series of pedestrian bridges is part of the Government's vision for making Brisbane one of the most pedestrian–friendly cities in the world. Four cross–river pedestrian bridges will link South Bank and the CBD with Kelvin Grove and Bulimba, with inner–city pedestrian links and a light rail network that would stretch from South Brisbane to New Farm and possibly Bowen Hills
- The past problem with interpretative signage in the city sub–destination is currently being addressed through a signage strategy undertaken by the BCC
- The planned redevelopment of Roma Street Train Station, and the Transit Centre

continued

FUTURE DEVELOPMENTS *continued*

Product Development

- Planning is currently underway on the Great Sunshine Way touring route, which will link together the key destinations of Southern Queensland, including Brisbane, the Gold Coast, the Sunshine Coast, the Fraser Coast, and Southern Queensland Country. The route will link together already established drive routes, tourism products and destinations and packages them appropriately for an international consumer and trade audience
- The Moreton Bay Marine Park zoning plan is in the process of being reviewed. This process should ensure the destination is developed to ensure the sustainability of the natural resources of the island and bay, and also to ensure the viability of tourism in the area is maintained
- The Scenic Rim Tourist Drive is planned to be installed by the end of 2008 creating a link between the popular Gold Coast Food and Wine Trail and the Cobb & Co. Tourist Drive starting in Ipswich
- The Brisbane Convention and Exhibition Centre is planning a $90 million expansion to provide the centre with the greatest and most flexible plenary capacity in Australia by 2009
- Construction of the $77 million State Tennis Centre at Tennyson commenced in early 2007. The Centre will provide 23 international–standard courts and will seat up to 5,500 around centre court. The State Tennis Centre is due to be completed by late 2008, in time to host the Inaugural Australian Combined Men's and Women's Hardcourt Championships in January 2009
- Art and cultural tourism will benefit from $209 million in funding during 2007–2008, with Government support for signature festivals, such as the Brisbane festival, continuing. One million dollars has also been committed to planning a major international design centre
- Due for completion in 2009, Australia Zoo is undergoing a $90 million expansion to include an open–range zoo and Indigenous learning and conservation areas

Recreation

- The Queensland Government has proposed to build the Wyaralong Dam on Teviot Brook, following an Environmental Impact Statement. Constructions could begin in 2009 to be completed by 2011 at a cost of $553 million
- The Queensland Government is investing $8.8 million in two recreational trails, one linking Boonah to Ipswich and the other linking Ipswich to Blackbutt through the SEQ Recreational Outdoor Recreation Strategy

Tourism Information and Services

- Installation of the nation's highest speed broadband service across the Brisbane destination at a cost of $550 million to deliver ultra high–speed broadband to the community and business

Events

- Brisbane's Suncorp Stadium will host the 2008 International Rugby League World Cup Final on November 22 with an estimated 8,000 international visitors travelling to Australia to watch the tournament with an estimated economic benefit of $17 million

4.2.4 Industry Development and Coordination

This section outlines activities which enhance and build the knowledge, skills and professionalism of the tourism industry in the Brisbane destination and in Queensland as a whole.

State Programs

Regulation of Inbound Tourism Operators – The Tourism Services Act 2003 was developed in response to undesirable and unfair trading practices carried out by some Inbound Tourism Operators in Queensland. The legislation seeks to provide greater protection for Queensland's tourism industry and aims to eliminate unfair practices such as controlled shopping, misrepresentations, overcharging for goods and services, and unconscionable conduct. For further information about the regulation of Inbound Tourism Operators, please visit the Office of Fair Trading website **www.fairtrading.qld.gov.au**

Visitor Safety Initiatives – The Queensland and National Visitor Safety Programs (QVSP and NVSP) aim to educate tourism operators about their responsibilities and to inform international visitors about potential risks and hazards while travelling in Australia. They address beach, road, bush and outback safety issues. For further information visit **www.queenslandholidays.com.au**

Public Liability – The Public Liability Insurance Taskforce provides a whole–of–government approach to identifying the impacts of the rising cost of public liability insurance on the tourism industry and communities. Updates on the implications of insurance industry reforms are now available from the Queensland Tourism Industry Council (QTIC) **www.qtic.com.au**

The Tourism Assistance Database provides information on available funding programs and grants for the tourism industry. It also provides advice, hints and tips on submitting a funding application. For further information please visit the Tourism Queensland (TQ) website **www.tq.com.au**

The Queensland Visitor Information Centre Signage Policy identifies Visitor Information Centres (VICs) that provide a high standard of service and encourages other centres throughout Queensland to reach the same level. Accredited VICs, which can be recognised nationwide by the trademarked yellow italicised 'i' symbol, demonstrate high standards in a range of areas including business management, service and effective signage. For further information please visit the TQ website **www.tq.com.au**

The Tourism Skills Development Guide is a project management tool that helps identify skills development needs in the tourism industry. The guide encourages a partnership approach by providing links to key agencies, useful networks, educational and training resources and business development support organisations. For further information please visit the TQ website **www.tq.com.au**

Ecotourism/Nature–based – TQ is working in conjunction with key stakeholders in the delivery of a number of strategic plans and initiatives including the Queensland Ecotourism Plan 2003–2008 and programs associated with Theme Five of the Queensland Tourism Strategy. For more information on ecotourism and certification please visit the TQ website **www.tq.com.au**

The Drive Tourism Program is a partnership between the Department of Main Roads (DMR), TQ, the Local Government Association of Queensland and the eight Route Steering Committees (RSCs) that represent the Strategic Touring Routes of Queensland. These include the Pacific Coast Touring Route, Australia's Country Way, Leichhardt Highway, Great Inland Way, Matilda Highway, Savannah Way, Overlander's Way and Capricorn Highway. The RSCs are made up of State, Regional and Local Tourism Organisations, local governments, Regional Economic Development Groups, Area Consultative Committees (ACCs) and operators. For more information on the Drive Tourism Program please visit the TQ website **www.tq.com.au**

Connecting Tourism for Business Success Guide – The Guide is a useful one–stop–shop for every business in the tourism industry. The Guide provides information, publications and networks for businesses at every stage of the business lifecycle. The Guide was developed through a partnership between QTIC, the former Department of State Development and TQ. For further information visit the TQ website **www.tq.com.au**

Tourism Business Assistance – TQ provides extensive information online to assist tourism businesses in Queensland starting out in tourism, financing businesses, complying with all appropriate regulations, growing tourism businesses and promoting tourism businesses. For further information visit the TQ website **www.tq.com.au**

Regional Programs

Through attendance of regional meetings and the development of the Destination Management Plan, regional tourism stakeholders work in partnership to identify, facilitate and progress strategic tourism initiatives and development opportunities in the Brisbane destination. Relationships have been developed with the two Regional Tourism organisations (RTOs), local councils, ACCs, State Government departments through the Regional Managers Coordination Network (RMCN), and specific project based steering committees in the destination.

Regional Tourism Investment and Infrastructure Plan – Access to Queensland is critical to the future development of tourism. To provide Queensland with a strong competitive advantage, investment in tourism infrastructure must keep pace with the demands of consumer access. The need to identify

product, public and private sector infrastructure and investment requirements and opportunities has been identified as a key outcome from the Queensland Tourism Strategy. The Regional Tourism Investment and Infrastructure Plan will assist in identifying future infrastructure investment needs in the Brisbane destination and is estimated to be completed by March 2008.

Regional Skills Project – A joint initiative between QTIC and Brisbane Marketing to facilitate additional training activities throughout regional Queensland.

Regional Tourism Crisis Management Plan Template – Developed to assist regions to address regional crisis management planning, the template provides the tool to develop a consistent and coordinated response and recovery in the event of a 'shock' impacting tourism in a region. The template is based on the Queensland Crisis Management Plan.

Brisbane's Moreton Bay and Islands Marketing and Development Plan – Following the release of the Brisbane's Moreton Bay and Islands CRC Sustainable Tourism Report and the Brisbane Destination Management Plan August 2004, the need for better alignment of state, local and regional partnerships in the Brisbane's Moreton Bay and Islands sub–destination on areas of marketing, product and infrastructure development was identified. TQ and BM in partnership with the councils of Caboolture Shire, Redcliffe City, Redland City and Brisbane City established a marketing and development plan for Brisbane's Moreton Bay and Islands. Key outcomes of this plan include:

- A 'first time' dedicated Brisbane's Moreton Bay and Islands campaign conducted for Brisbane's Moreton Bay and Islands with a co–operative marketing campaign in May 2006. The campaign included on line and press advertising targeting families and couples living in Brisbane and South East Queensland
- Brisbane's Moreton Bay and Islands Symposium, which included industry training on business planning, packaging, distribution and customer service
- Brisbane Marketing established collaborative partnerships with selected industry and councils to develop packages, which can be sold in the interstate and international marketplace. This project can be replicated throughout the destination.
- A new website for the destination has been developed and will be launched in the next major campaign in 2008.

Scenic Rim Tourism Action Plan – Funding has been secured through the Community Futures Taskforce to examine the role of tourism in the economic futures for the communities affected by the proposed Wyaralong Dam between Boonah and Beaudesert. A Tourism Action Plan, Marketing and Development Program and Training initiative will be coordinated in the area known as the Scenic Rim. The Steering Committee for this project agreed for the report preparation component of this initiative included as part of the consultancy for the Brisbane Regional Tourism Investment and Infrastructure Plan.

Adventure Tourism Strategy (Queensland) – Adventure Tourism, a sub–set of both eco and nature–based tourism, is an emerging experience and target market for the Brisbane destination. With a number of adventure tourism operators amongst the State's highest diversity of adventure operators, and a suitable natural environment, the opportunities for the destination are significant. As outlined in the Adventure Tourism Strategy, key strategic priorities for Queensland and the Brisbane destination include raising the profile of the adventure experiences; increased industry cohesion adoption of sustainable business practices; more information and research for decision making; and to encourage more training and development opportunities.

Education Tourism – Following major investment in infrastructure and marketing, the Brisbane destination is booming as a hub for international education tourism (school excursions, study tours, and English language courses). Better coordination is needed between the tourism and education industries to maximise the potential economic returns of this emerging market and tourism experience.

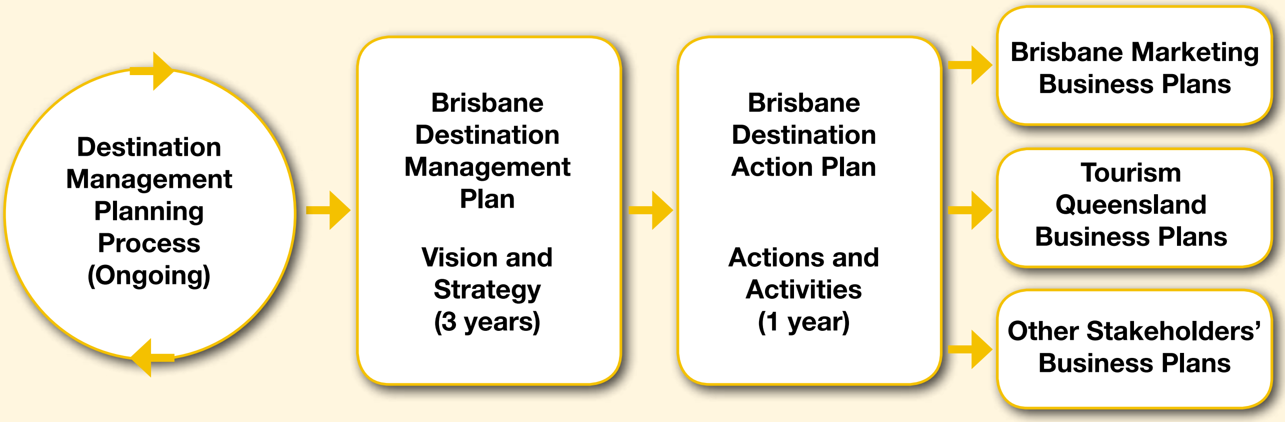
Countryside, Esk

The Brisbane Destination Management Plan (DMP) is an articulation of the strategic direction for the destination identified through the destination management planning process. It has been developed through research and consultation and will be used as a basis to engage regional tourism stakeholders on tourism development and marketing issues. To ensure the DMP remains relevant, it will be reviewed and refreshed every three years.

The DMP will guide the planning processes and programs of Brisbane Marketing, and Tourism Queensland (TQ). It is envisaged that the key ideas and strategies outlined in the plan will also inform the action plans of other stakeholders with an interest in the coordinated and sustainable development of tourism in the destination.

Destination Action Plan

Specific actions and activities relating to the strategies outlined in the DMP will be included in the Destination Action Plan (DAP) and the annual business plans of BM, TQ and key industry partners. These are internal documents for the use of TQ, Brisbane Marketing and other relevant stakeholders.



The Brisbane DAP will be the primary mechanism for monitoring and evaluating the progress made towards the implementation of strategies outlined in the Brisbane DMP.

The DAP will outline the objectives, actions and specific activities for the ensuing financial year. Responsibilities and timelines for the implementation of various strategies outlined in the DMP will be identified. Performance indicators will also be identified and reviewed on a regular basis.

Appendix 1 DATA SOURCES

Tourism Research Australia, International & National Visitors Survey

Note: Outliers have been removed from the international and domestic data.
*Europe (excluding the United Kingdom and Germany)

The National Visitor Survey (NVS) is managed by Tourism Research Australia (TRA). This monitor is a household survey involving face–to–face interviews with an annual national sample of approximately 80,000 Australian residents aged 14 years and over. The International Visitor Survey (IVS) involves a detailed single–purpose questionnaire, which is administered by personal interviews with a sample of "overseas visitors" aged 15 years and older, departing from Australia's nine major international airports. These surveys use the Australian Bureau of Statistics/TRA regions.

Standard Statistical Error

Research used in this publication, such as that conducted by Tourism Research Australia, had inherent weaknesses resulting from the process of sampling. Where only a portion of the entire population of visitors is surveyed, Tourism Queensland (TQ) cannot be 100% certain that the information collected is a perfect reflection of the total population.

The net result of the sampling process is information that is accurate, but only within certain limits. Typically, these limits are referred to as confidence intervals. For the purpose of tourism data sources such as the NVS and IVS, TQ utilise the 95% confidence interval, wherein we can be confident, i.e. 95 chances in 100 that data generated from the respective survey is likely to fall within a certain range.

How large the range is depends on the size of the sample collected and is called the standard error. For many of Queensland's regions with smaller numbers of visitors, sample sizes are reduced and the corresponding standard errors are increased. Caution should be used when interpreting data from all regions but particularly those with smaller visitor numbers

The size of the standard error must be considered when analysing information contained within this publication. The standard error that is applicable to the Brisbane destination at the 95% confidence interval is as follows; International YE September 2007 95% confidence interval, percentage of estimate is 27%, and domestic YE September 2007 95% confidence interval, percentage of estimate is 17%. This means that there are 95 chances in 100 that the number of international visitor nights spent in the Brisbane destination will be within the range of plus or minus 27%, and there are 95 chances in 100 that the number of domestic visitor nights spent in the Brisbane destination will be within the range of plus or minus 17%.

Local Government Area (LGA) Profiles

The LGA profiles are standardised statistical reports generated by the Office of Economic and Statistical Research (OESR) – a division of Queensland Treasury. The LGA Profiles are customised reports generated for the user selected region(s) and bring together recent and comprehensive data on the respective regional economies using a variety of government sources. Topics such as population (including growth rates), business, building activity, agriculture and employment are covered in each report.

Roy Morgan Holiday Tracking Survey (HTS)

Roy Morgan Research's HTS is a component of Roy Morgan Single Source, which uses the same methodology as the Morgan Gallup Poll. Roy Morgan Single Source uses a stratified random probability sample to ensure that all states, then metropolitan and country areas are correctly represented.

The HTS has two components: a face–to–face interview and a self–completion questionnaire. All people who complete the face–to–face component are offered the self–completion survey. Only one person aged 14 years and over is interview per dwelling. A large sample collected continuously over the year means that samples of lower incidence populations can be accumulated week by week to the desired size.

The HTS information is collected as part of the self–completion questionnaire. Approximately 25,000 of these are processed in each 12–month period. These are weighted by age, sex and area to be representative of the Australian population.

Survey of Tourism Accommodation (STA)

The STA is a quarterly survey of all establishments providing predominantly short–term accommodation (i.e. for less that two months) to the general public. It is conducted by the ABS. From January 1998 the survey includes establishments with 15 or more rooms and provides information relating to the following categories: licensed hotels with facilities; morels and guesthouses with facilities; and serviced apartments (daily servicing must be available, although this service may not necessarily be used). This survey uses the ABS/TRA regions.

Appendix 1 DATA SOURCES

Economic Contribution

The economic contribution of tourism has been developed by the Office of Economic and Statistical Research (OESR). The figures used in this report come from *The Contribution of International and Domestic Visitor Expenditure to the Queensland Regional Economies 1998-99*.

Destination Positioning Research

Destination Positioning Research is conducted every three years by TQ to examine the positioning of the established tourism regions in Queensland in the domestic marketplace. This research is an integral part of refining the marketing strategies for the regions. The regions examined are the Gold Coast, the Sunshine Coast, Tropical North Queensland and the Whitsundays. The research involves telephone surveys with residents in Brisbane, Sydney and Melbourne.

A range of research and information available for the Brisbane destination includes:

- Research that tracks and forecasts tourism demand and supply
- Estimates of the contribution of tourism to Queensland and its destinations
- Tools that model the impact of shocks or tourism policy initiatives on the Queensland economy
- Standard visitor surveys that profile visitors to Queensland destinations as well as identifying issues with tourism infrastructure, products and services
- Research that profiles market and accommodation sectors
- Research that assists market segmentation

This and other useful research can be accessed thorough the TQ website **www.tq.com.au/reserach**

Research specific to the Brisbane destination includes:

- Brisbane Regional Update – a brief overview of regional tourism trends produced biannually

Appendix 2 GLOSSARY

ABS – Australian Bureau of Statistics

ACC – Area Consultative Committee

APEC – Australia and Pacific Economic Cooperation

ATDW – Australian Tourism Data Warehouse

ATE – Australian Tourism Exchange

ATEC – Australian Tourism Export Council

B&B – Bed and Breakfast Accommodation

BCC – Brisbane City Council

BBFQ – Bed and Breakfast Farmstay Queensland

BM – Brisbane Marketing

CEO – Chief Executive Officer

DAG – Destination Action Group

DAP – Destination Action Plan

DETA – Department of Education, Training and the Arts

DITR – Department of Industry, Tourism and Resources

DLGSR – Department of Local Government, Sport and Recreation

DMP – Destination Management Plan

DMR – Department of Main Roads

DNRMW – The Department of Natural Resources Mines and Water

DPIF – Department of Primary Industries and Fisheries

DTM – Domestic Tourism Monitor

DTRDI – Department of Tourism, Regional Development and Industry

DTP – Drive Tourism Plan

DTP2 – Drive Tourism Plan 2

DTRS – Department of Transport and Regional Services

EEC – European Economic Community

EPA – Environmental Protection Agency

GRP – Gross Regional Product

GSP – Gross State Product

HTS – Holiday Tracking Survey

ITO – Inbound Tour Operator

IVS – International Visitor Survey

LG – Local Government

LTO – Local Tourism Organisation

NSW – New South Wales

NVS – National Visitor Survey

NVSP – National Visitor Safety Program

OESR – Office of Economic and Statistical Research

OUM – Office of Urban Management

QEC – Queensland Events Corporation

QERDP – Queensland Events Regional Development Program

QHA – Queensland Hotel Association

QR – Queensland Rail

QT – Queensland Transport

QTIC – Queensland Tourism Industry Council

QTS – Queensland Tourism Strategy

QWIA – Queensland Wine industry Association

RMCN – Regional Managers Coordination Network

ROC – Regional Organisation of Councils

RSC – Route Steering Committee

RTO – Regional Tourism Organisation

SD – Statistical Division

SEQ – South East Queensland

SEQC – South East Queensland Country

SLA – Statistical Local Area

STA – Survey of Tourist Accommodation

STO – State Tourism Organisation

SVS – Standard Visitor Survey

SWOT – Strengths, Weaknesses, Opportunities, Threats

TA – Tourism Australia

TAG – Tourism Advisory Group

TFC – Tourism Forecasting Committee

TQ – Tourism Queensland

TRA – Tourism Research Australia

TTF – Tourism Task Force

UK – United Kingdom

VFR – Visiting Friends and Relatives

VIC – Visitor Information Centres

YE – Year ended

Brisbane