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Queensland Tourism Strategy

Regional Tourism Industry Consultation Briefing Paper



Introduction

You have recently been invited to attend an industry consultation meeting to discuss development of the Beattie Government's Queensland Tourism Strategy. The Government values your input.

The Strategy is an initiative of Tourism Minister Margaret Keech. Premier Peter Beattie launched the Queensland Tourism Strategy consultation and development program on 24 May 2005.

When completed, the Strategy will be the vision for the sustainable development of Queensland tourism over the next 10 years. It will provide leadership and direction, identify and address policy gaps and reflect government, industry and community priorities. The Strategy will take a coordinated, holistic government/tourism industry approach to development and guide the implementation of key whole-of-state strategies as well as regional, destination-based tourism initiatives.

Hierarchy of Plans



Following on from an initial program of desk research and peak industry and government consultation, the primary purpose of the regional tourism industry consultation program is to ensure that tourism industry stakeholders and community interests are identified, heard and valued and that this input is recorded and considered in the development of the Strategy.

Twenty consultation meetings will be conducted around the State by tourism consultants Stewart Moore and Ian Kean on behalf of the Beattie Government.

The purpose of this briefing paper is to provide regional industry stakeholders with some background and context in preparation for the consultation meetings. Please take the time to read it and form your thoughts before your meeting.

Workshop participants will be provided with timely feedback following each regional session and results from around the State will be aggregated into a final report. This report will provide key input into the development of the Strategy. Further detailed information on the program can be found at www.qldtourismstrategy.com.au

The Need For A Strategy

Queensland's last strategic tourism plan – Queensland Tourism: A Framework for the Future, was released in 1996. While this plan provided direction for the progress of tourism in the State over a number of years, emergent agendas have taken the focus away

from this as the State's principal strategic tool. Under the Beattie Government priorities for service delivery, tourism in Queensland is currently guided by two key strategic frameworks, in addition to number of specific whole of state initiatives:

- The Queensland Government's Growing Tourism Strategy (State Government – department/agency coordination)
- Destination Management (TQ – regional development and marketing coordination).

While these two frameworks are important coordinating mechanisms, there is currently no overarching strategic policy document providing the vision, direction and leadership for the sustainable growth of tourism in Queensland over the medium to longer term.

In line with the strategic objectives of the Queensland Government, the objective of the Queensland Tourism Strategy is:

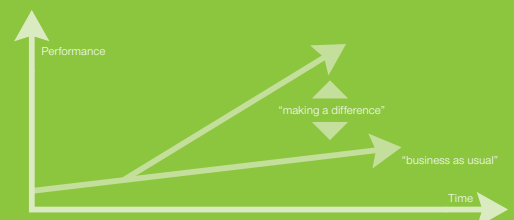
To develop an overarching Queensland tourism strategy as a cohesive planning framework for the optimum coordination, management and development of a vibrant, dynamic tourism industry that facilitates sustainable economic, environmental and social benefits for Queensland over the next 10 years.

When completed, the Strategy will:

- Establish a clear 10-year vision for tourism in Queensland
- Provide an overview of the key drivers/influences impacting the industry at present and into the future
- Set challenging but realistic targets and objectives for the sector
- Identify the key strategies that are necessary to take tourism forward and
- Outline an implementation plan that will establish roles, responsibilities, timeframes, resources and methods to make the Strategy work for Queensland.

The Strategy will focus on areas where government and industry can make a discernible and measurable difference over the next 10 years. It will lead to improved tourism outcomes for both industry and government and deliver a range of long-term benefits.

Queensland Tourism





Industry Influences and Trends

As an open business system, tourism is subject to a range of global influences and events that can impact on the sustainability of the Queensland industry at a state and regional level. While these external forces occur outside the industry's direct control, they can present opportunities for growth and development for the State and stimulate strategic responses to counter possible threats. The diagram below illustrates just some of the key trends occurring in the macro environment that may impact on Queensland tourism.

Social & Cultural Trends

- Increasing population in urban and coastal cities
- Increasing risk of disease pandemic
- Ageing, affluent, active western population
- Emerging middle class in developing countries will influence travel demand
- Growing concerns for safety and security

Competitive Trends

- A new hierarchy of destinations will take hold as Asia and India become more popular
- Combined with the growth of new destinations, competition among countries will be more intense
- The various regional economic agreements (EEC, APEC, etc.) will facilitate travel within trade zones
- Tourism will become a regional, rather than a global phenomenon

Natural Environment

- Environmental and social awareness will increase.
- As certain places sustain damage, mass tourism will decline
- Impact of natural and man-made disaster on travel behaviour

Economic Trends

- Fluctuating global economies and variable exchange rates will continue to influence travel demand
- Variable fuel prices will influence transport supply and demand

Technology Trends

- Technology will continue to develop at a rapid pace and involve all sectors of the industry
- Mobile phones will be used to plan and organize all aspects of trip
- High-definition televisions and computers will provide virtual visits of a destination
- Innovations in transportation will impact on range, speed, comfort and safety of travel

Political/Legal Trends

- Terrorism will be part of the equation and travellers will adjust
- Security measures will be standardised around the world and their cost will push airfares up



Tourism Market and Industry Trends

- As baby boomers retire en masse from 2010 to 2020, they will shape demand
- Increasing market fragmentation, growth in special interest/ niche markets
- More frequent, shorter holidays
- Increased use of new media technology as an information, booking and sales channel
- Increased price sensitivity
- High service expectations
- Greater demand for customised holidays
- The liberalisation of air transport and low cost travel will influence travel demand
- With greater speed and capacity - remote destinations will be more accessible to many travellers
- As the world becomes smaller and more accessible – long-haul getaways will become more affordable
- Emerging travel markets in developing countries will influence travel demand
- Oversupply of undifferentiated travel products & destination will impact on competitiveness



From the Minister

For this Strategy to be successful, there has to be industry involvement. The consultation meetings provide an opportunity for you to have input into the issues that need to be addressed in the Strategy.

If Queensland tourism is to be sustainable and continue to deliver benefits to all Queenslanders, it will need to be managed under a framework that has clear objectives. These may be grouped under economic objectives, social objectives and environmental objectives.

The obvious economic objectives are for tourism to continue to contribute significantly to the Queensland economy and to regional and local economies and to provide a variety of employment opportunities.

Ideally, tourism should add value to local communities and their residents and provide infrastructure and services that visitors and residents can enjoy. Peaceful and harmonious interaction between visitors and residents is a further ideal.

Visitors come to enjoy our unique natural features. We need to ensure that their appreciation of our natural wonders is consistent with our conservation efforts. Much work has been undertaken in recent years to develop partnerships between the protected area management agencies responsible for conservation and the tourism industry, so visitors can experience our natural beauty and contribute to its conservation.

Tourism is changing rapidly with improvements to transport and technology. How will it continue to change in the coming decade? What are the issues that will drive the changes? How will these changes impact on Queensland's tourism operators who provide the visitor experiences?

What is our vision for Queensland tourism to the year 2015? How do we capture and describe this vision so that the Strategy that is developed to achieve it can be successful?

A Strategy is a plan to reach desired outcomes. What targets should be set for Queensland tourism to achieve? How will we know when we have reached our targets? How do we measure progress along the way?

These key issues will be discussed at the consultation meeting. A successful Queensland tourism industry requires successful tourism operators throughout the State. It also requires a shared vision and understanding of what we want from tourism and how best we can achieve it.

Please give thought to these matters between now and the consultation meeting. I value your input.

Margaret Keech MP
Minister for Tourism, Fair Trading and Wine Industry Development

Where To From Here

The creation of the Queensland Tourism Strategy involves a comprehensive program of research and consultation. Under the guidance of a joint Government/Industry Steering Committee, Tourism Queensland and the Department of Tourism, Fair Trading and Wine Industry Development are leading the development process and will oversee the completion of the Strategy document.

Following each regional consultation workshop participants will receive a top-line report on the outcomes as acknowledgement and verification of input. The results of all workshops will be aggregated in a final report on the regional program. This information, together with outcomes of Phase One of the consultation program and the desk research, will be key inputs into the development of the Strategy. Once Government has approved the draft Strategy, it will be released for public review and feedback. At the end of the review period, all feedback will be collated and considered in the creation of the final Strategy.

QTS Planning Model



Further Information

For further information about the Queensland Tourism Strategy, visit www.qldtourismstrategy.com.au or contact the **QTS Program Manager** 07 3535 5000 or 07 3225 2765 or **email** qts@tq.com.au