

Tourism and Events Queensland Strategic Plan 2020-24

WHO WE ARE

Tourism and Events Queensland (TEQ) is a statutory body established under the *Tourism and Events Queensland Act 2012* and part of the portfolio of State Development, Tourism and Innovation.

OUR VISION

Inspiring the world to experience the best address on Earth.

OUR PURPOSE

Achieving economic and social benefits for the State by growing the tourism and events industry in partnership with industry and Government.

We are a consumer-led, experience-focused, destination-delivered organisation that connects people and places like never before through innovation and collaboration with the tourism and events industry.

OUR VALUES

- Lead Together
- One Team
- Go Beyond
- Agile and Responsive

WHAT THIS PLAN SETS OUT TO ACHIEVE

TEQ is Queensland's lead tourism marketing, destination and experience development, and major events agency. This plan sets out TEQ's strategic positioning, the way that we create unique value for the State's tourism and events industry, particularly in growing overnight visitor expenditure (OVE) and market share for Queensland.

Building on the successes of *Advancing Tourism 2016-2020: Growing Queensland jobs*, the Queensland Government has commenced development of a long-term strategic direction for tourism growth to 2035. The intent is to establish an overarching framework to inform and prioritise policies, actions and investment for government and industry, to support a resilient visitor economy. TEQ will invest in strategic focus areas that support delivery of this strategic direction and contribute to its agreed goals, and will respect, protect and promote human rights in all decision making and actions.

LANDSCAPE

The Australian tourism industry has faced unprecedented challenges in 2019-20. Queensland communities were severely affected by bushfires in late 2019, following an already devastating drought, with global media coverage of Australia's bushfire crisis in early 2020 resulting in misperceptions regarding the geographic spread of the fires, impacting travel intentions.

The COVID-19 global pandemic in 2020 saw public health directions and social distancing measures force the postponement or cancellation of events, restrict non-essential travel and suspend aviation services, severely impacting the tourism and events industry. Looking forward, changing consumer expectations and the perception of safety while travelling will impact business operations and marketing. Australia's response to COVID-19, coupled with Queensland's nature-based offering, reinforces our proposition as a safe and secure destination which may be a point of difference that encourages increased international visitation once borders reopen.

The state's industry has demonstrated its resilience and ability to recover, adapt and grow following significant external events and disasters in the past, and are being supported to develop strategies to re-enter the market in line with easing restrictions and changes required in the post COVID-19 environment. TEQ will work with government and industry to support tourism and events businesses as part of the Queensland Economic Recovery Strategy: *Unite and Recover for Queensland Jobs*, to help the state recover from COVID-19. TEQ's strategic priorities will be continually reviewed as the economy and tourism industry recover.

STRATEGIC PERFORMANCE AND OPPORTUNITIES

Visitor economy growth

As at December 2019, tourism in Queensland generated \$25.5 billion OVE¹ and contributed 77 per cent of Gross State Product (GSP), supporting 234,300 jobs². Queensland had achieved 18 consecutive quarters of record total OVE as at December 2019 and the visitor economy represented an area of significant growth potential for the Queensland economy.

Post COVID-19, TEQ will work to rebuild consumer demand, aviation capacity and the value of Queensland's events calendar, in order to maximise opportunities for visitor economy growth and to protect market share, as economic conditions stabilise in key source markets. Visitor economy growth opportunities are pursued in line with TEQ's marketing and events strategies.

Technology and digital advancement

Mobile technology developments continue to influence the way tourists plan and experience travel. TEQ continues to develop data and technology capability, through its Digital Transformation Program, in order to better meet expectations for increasingly personalised services.

Consumer values and needs are changing

Nearly two-thirds of global consumers have a preference for purpose-led brands that reflect their own values and beliefs³. Queensland's new 'travel for good' purpose-led brand positioning has been intentionally designed to address this trend and deliver transformational travel experiences by responding to changing consumer needs and values. The brand positioning is also well suited to cater to changing consumer values and needs post COVID-19.

Indigenous tourism

Aboriginal and Torres Strait Islander cultures provide Queensland with two distinct Indigenous cultures, and a significant opportunity to build a strong advantage over competitor destinations. TEQ is committed to reconciliation and will contribute to the Queensland Government Reconciliation Action Plan via a dedicated TEQ Indigenous Participation Plan, guided by the TEQ Board Aboriginal and Torres Strait Islander Committee.

An increase in Indigenous participation in tourism and events will be celebrated through the Year of Indigenous Tourism. Government is investing to grow the Indigenous tourism offering, increasing the range and diversity of experiences available to travellers.

Aviation advancements

Advancements in the aviation industry could lead to Australia being a non-stop flight destination from more major long-haul source markets. As the aviation sector rebuilds post COVID-19, a growth opportunity emerges with the changing perception that Australian destinations are more accessible.

STRATEGIC RISKS

Queensland's tourism industry operates in a highly competitive environment and targeted outcomes can be impacted by a variety of social, economic, political, environmental and technological changes. Strategic risks faced by TEQ include:

Significant uncontrollable external events including climate change, natural disasters, global shocks, pandemics such as COVID-19 and geopolitical events that may affect consumer perceptions and their ability to travel, and/or the health or appeal of our natural assets, that may impact our ability to grow the visitor economy.

Variable economic conditions within Australia and in key source markets that can impact visitor economy growth and demand for Queensland experiences.

Changing consumer expectations and competition from other tourism and events destinations that affect demand for Queensland's products, experiences and destinations.

TEQ works in partnership with industry, government and regional tourism organisations to leverage opportunities to grow the visitor economy and minimise the adverse impacts of issues as they arise. TEQ also seeks to continuously improve the identification and management of all strategic risks and takes a balanced portfolio approach to global market investment.

1. Tourism Research Australia, *International and National Visitor Surveys*, year ended December 2019.

2. Tourism Research Australia, *State Tourism Satellite Accounts 2018/19*, Tourism directly contributed \$13.8b of GSP supporting 145,400 jobs.

3. Accenture Strategy, *From Me To We: The Rise Of The Purpose-led Brand*, 2018.

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GOVERNMENT'S OBJECTIVES FOR THE COMMUNITY

*Our Future State:
Advancing Queensland's
Priorities*

Create jobs in a strong economy

TEQ supports this objective by:

- Marketing and promoting tourism in Queensland to generate OVE and support jobs
- Tourism experience and destination development that meets consumer expectations
- Working to identify, attract and promote major events that generate economic impact
- Providing support and leadership to Queensland's tourism industry

Be a responsive Government

TEQ supports this objective by:

- Working in partnership with other Queensland Government agencies to progress portfolio priorities
- Undertaking research and analysis of the Queensland tourism industry to inform strategic decision making

TEQ OBJECTIVES

PERFORMANCE INDICATORS

Contribute to the Queensland economy

Service delivery measures:

- OVE, direct and incremental spending, visitors to Queensland and direct visitor nights generated by events within the portfolio
- Value of collaborative support
- Ratio of regional and strategic partnership investment to TEQ's investment

Attract visitors to Queensland, generating OVE

Industry outcome measures:

- Economic impact of tourism and job creation
- Total OVE in Queensland
- Market share of Australian OVE (total, leisure and holiday visitors)

Enhance the profile of Queensland

- Publicity and promotional value
- Brand performance

Foster community pride in Queensland

- Local pride (positive impacts of tourism)

STRATEGIC PILLARS 2020-2024

Stakeholder and industry engagement

Engage and influence key stakeholders across the tourism network to effectively connect consumer demand with supply

Consumer demand

Generate demand by building Queensland's competitive position in the global market and meeting consumer needs whilst maintaining a balance to our portfolio of source markets to ensure resilience

World-class events calendar

Deliver a high performing events calendar guided by the Events Strategy 2025 to maximise economic and social benefits for Queensland

Experience design

Lead experience design by guiding and empowering the tourism network to deliver transformational tourism and event experiences aligned to the Queensland brand promise

Aviation access and capacity

Rebuild aviation access and capacity through a targeted global strategy in partnership with airports, airlines and industry partners

High performing organisation

Continuous improvement of employee capability, operational efficiency and organisational resilience

Strategic research

Undertake research and intelligence analysis into global economic impacts, market trends and consumer behaviour to identify opportunities and inform decision making

The seven strategic pillars will collectively deliver TEQ's objectives, which in turn, collectively contribute to the Government's objectives for the community.