

A person wearing a blue shirt, black shorts, and a white cap stands on a large, rounded rock formation. They are looking out over a vast landscape of rolling hills and dense green vegetation. The sky is filled with dramatic, colorful clouds in shades of orange, yellow, and purple, indicating a sunset or sunrise. The overall scene is serene and scenic.

Queensland Country

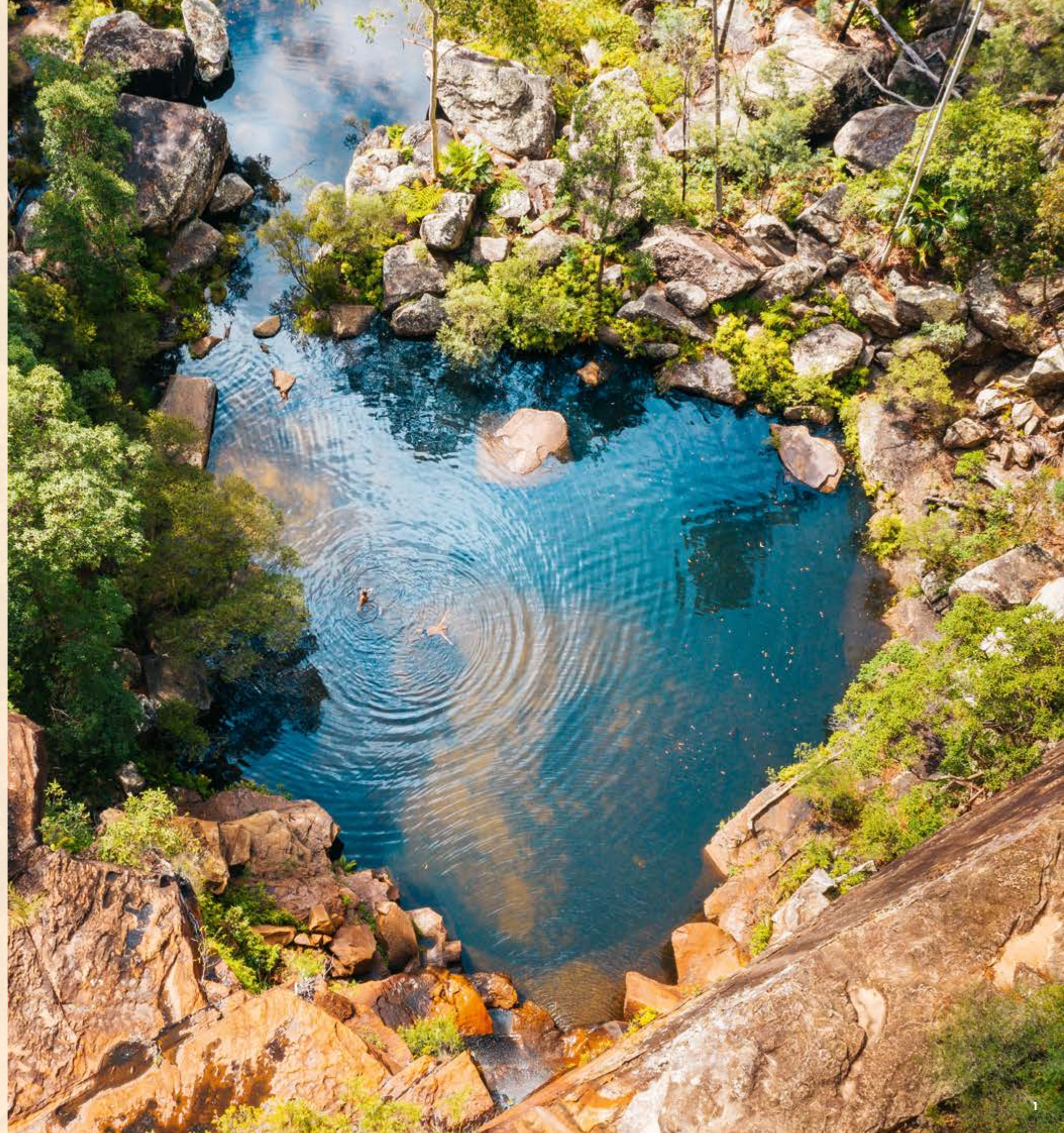
**Destination Management Plan
Towards 2032**

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ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Traditional Custodians of Queensland Country whose song lines traverse the lands on which we work, live and visit. We pay our respects to their Elders past, present and future.



Purpose

The Queensland Country Destination Management Plan (DMP) is a road map to guide us into the future.

Its purpose is to provide a collective focus, strategy and actions for sustainable growth and management of the visitor economy for Queensland Country to 2032 and beyond.

Our guiding principle is to collectively ensure visitors not only return but leave a lasting legacy of positive impacts for our local communities, visitor economy and natural environment.

Visitor Economy, Sustainable and Transformational Tourism Explained

The term 'visitor economy' referenced throughout the DMP is a contemporary definition of tourism, including people travelling not just for leisure, but for events, business, work, education or visiting friends and relatives. It brings together the industries that directly service visitors, for example accommodation, tours and attractions, as well as indirectly, such as retail and food production.

Sustainable and transformational tourism describes meaningful visitor experiences that extend beyond conventional holidays. A core focus of this DMP is a quadruple bottom-line approach; to balance the economic, cultural, social and environmental impacts of tourism for Queensland Country's long-term sustainability providing experiences that transform the lives of visitors and the communities and places they visit for the better.



The consumer landscape has evolved to embrace a purpose driven economy, one based on achieving the right balance between people, place, planet and profit. Transformational travel directly responds to consumers changing expectations and represents an opportunity to gain a competitive advantage in a shifting consumer landscape.

TRANSFORMATIONAL EXPERIENCE GUIDE,
TOURISM AND EVENTS QUEENSLAND (TEQ)

Destination Management Plan

AT A GLANCE

Vision

Queensland Country is renowned for authentic country experiences that embrace the seasons and savour the flavours of one of Australia's most productive regions, fostering deep connections with nature and local communities, transforming the lives of all who visit.

Goals



DESTINATION PROFILE

Build the brand of Queensland Country, appealing to high-value visitors



YEAR-ROUND VISITOR ECONOMY

Enable viable local enterprises and long-term employment through a sustainable year-round visitor economy



SUSTAINABLE TOURISM DEVELOPMENT

Encourage and lead industry sustainable practices, responsible investment and management



SOCIALLY RESPONSIBLE TOURISM

Drive social benefits for local communities, retaining our unique country, rural charm

Strategic Actions

1

Build the Brand

2

Develop Transformational Experiences

3

Drive a Year-Round Visitor Economy

4

Grow Industry Capacity

5

Cultivate Collaboration and Collective Investment

Our Underlying Philosophy

To warmly welcome visitors to experience the authentic country charm and natural beauty of Queensland Country. To our core, we ensure visitors leave Queensland Country, our natural environment, local communities and themselves transformed for the better. Collectively we achieve leading, vibrant country tourism experiences.



Welcome to Queensland Country

Queensland Country offers a rich tapestry of experiences for both visitors and residents alike. Nestled high amidst the Great Dividing Range, this expansive region captivates with its breathtaking landscapes and vibrant cultural scene.

With over 400,000 residents calling it home, Queensland Country boasts a sense of community that is as warm and inviting as its picturesque surroundings. From the foothills to the valleys, each corner of this vast expanse offers something different to explore.

For the 2.5 million annual visitors, Queensland Country is a haven of authentic country life. Here, they can immerse themselves in the tranquillity of rural life, breathing in the crisp, fresh air as they wander through iconic National Parks and soak in the vibrant hues of the landscape.

But it's not just about the scenery; Queensland Country's rich indigenous and agricultural heritage adds another layer of charm to the experience. Visitors have the opportunity to learn and savour the flavours of the land, indulging in the bounty of one of Australia's most productive agricultural regions.

Moreover, the region's event scene pulses with life, offering a diverse array of activities that celebrate the essence of Queensland Country. From wandering through fields of blooms and wildflowers, to joining in harvest celebrations and quintessential country festivals.

In Queensland Country, its four seasons bring its own magic, and every moment is an opportunity to connect with the heart and soul of the Australian countryside. Whether it's a leisurely stroll through the countryside, an exhilarating adventure in the great outdoors, or an indulgent escape in wine country, this region promises an unforgettable experience for all who visit.

Travelling to Queensland Country

Easily accessible by car, within 90 minutes of Brisbane and 2 hours from the Gold and Sunshine Coasts.

BY CAR

All roads lead to Queensland Country, including the Cunningham, New England (Australia's Country Way), Warrego, Leichhardt, D'Aguilar, Brisbane Valley, Gore, Capricorn and Gregory Highways and the Great Inland Way and the Adventure Way.

BY COACH

Regular coach services with Bus Queensland, Crisp's Coaches, Greyhound Australia and Murrays Coaches.

BY RAIL

Queensland Rail's The Westlander travelling through the Toowoomba Region, and Western Downs, with Spirit of the Outback travelling through Central Highlands.

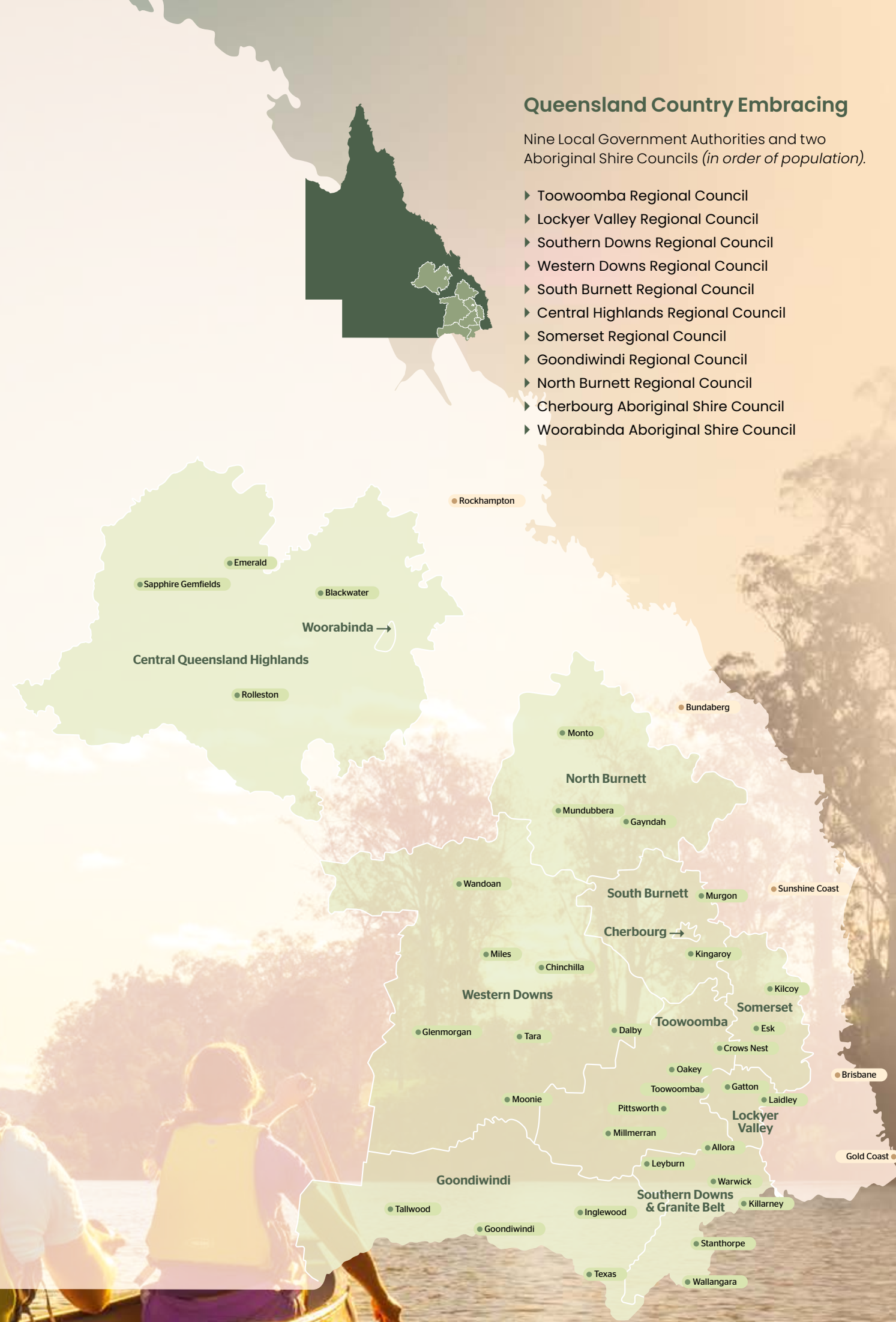
BY AIR

Connections to Toowoomba Wellcamp Airport (Qantas, REX, ex Bne, Syd), Emerald Airport (Qantas, Virgin ex Bne). Within 2-hour drive of Brisbane, Gold Coast and Sunshine Coast Airports.

Queensland Country Embracing

Nine Local Government Authorities and two Aboriginal Shire Councils (*in order of population*).

- ▶ Toowoomba Regional Council
- ▶ Lockyer Valley Regional Council
- ▶ Southern Downs Regional Council
- ▶ Western Downs Regional Council
- ▶ South Burnett Regional Council
- ▶ Central Highlands Regional Council
- ▶ Somerset Regional Council
- ▶ Goondiwindi Regional Council
- ▶ North Burnett Regional Council
- ▶ Cherbourg Aboriginal Shire Council
- ▶ Woorabinda Aboriginal Shire Council



Strategic Context

Strategic Alignment

The Queensland Country Destination Management Plan is developed within the strategic framework of national, state, regional and local visitor strategies.

NATIONAL

Thrive 2030, The Re-imagined Visitor Economy, Austrade.
National Sustainability Framework for the Visitor Economy.

STATE

Towards Tourism 2032 (TT2032)
Nature-based Tourism Strategy 2021-2024
TEQ Events Strategy 2025
The Ultimate Transformational Experience Guide, TEQ
Bike Tourism in Queensland

REGIONAL AND LOCAL

Local Government Authority strategies, including but not limited to:

- Visitor Economy
- Economic Development
- Events
- Arts & Culture
- RV-Caravan-Camping
- Sport & Recreation
- MTB Master Plans & Concept Designs
- Marketing Plans

Collaboration

Creating a whole-of-destination culture of collaboration will be instrumental in achieving long-term outcomes for tourism in Queensland Country. This collaborative approach will maximise the quadruple bottom-line benefits of tourism for Queensland Country.



Trends Influencing Visitor Demand

Global Travel Trends

EMERGING EXPERIENCES

According to booking.com, almost two thirds of travellers value experiences higher than material possessions, seeking authentic experiences. Emerging, undiscovered destination travel is also on the rise.

CONSCIOUS TRAVEL

Reflecting a growing concern among today's travellers for ethical and sustainable tourism options, many are seeking holidays that are purposeful and destinations that are open minded.

A staggering 80% per cent of global travellers reportedly told booking.com that travelling more sustainably is important to them, with two thirds (66%) wanting to leave the places they visit better than when they arrived.

WELCOME TO ALL

Rise in more inclusive and accessible travel experiences and destinations for all.

FIERCELY LOCAL

The desire to purchase local and 'Live like a Local', where visitors are seeking a local connection, to eat like a local, hang out where the locals go, not to be viewed as tourists and ensure their trip is beneficial to the local community.

Australian Travel Trends

Nielsen Consumer and Media View (CMV) June 2023 data reveals Australians' growing interest in online travel bookings, and an increased desire for travel in general. According to the data, 76% of Australians 'display a keen interest in visiting new places' with a significant majority showing a preference for:

64%
NATURE-CENTRIC EXPERIENCES

54%
EXPLORATION OF SECLUDED,
OFF-THE-BEATEN-TRACK LOCATIONS

WELLNESS TRAVEL

Travellers agree that travel helps their mental and emotional wellbeing more than other forms of self-care. Most recently (June 2024), Caravanning Queensland released research finding caravan and camping trips positively impact Aussies' mood and energy levels.

CARAVAN & CAMPING

Often associated with 'grey nomads', more young Australian families are hitting the road. The Caravan Industry Association of Australia reported 'parents with children at home' were the largest market for caravan and camping holidays in 2021. 'Very few sectors of the Australian tourism industry cater well for families - hotel rooms are almost always set up for couples,' Assoc. Professor Pierre Benckendorff UQ's School of Business.

LUXURY, HIGH-VALUE TRAVELLERS

According to Luxury Escapes who surveyed nearly 4,000 members, prominently Generation X or Baby Boomers, the 2024 travel trends are:

58%
EXPERIENTIAL TRAVEL

58%
FOOD TOURISM

36%
WELLNESS ESCAPES

34%
MULTI-GENERATIONAL TRAVEL

Situation Analysis

Visitor Economy Snapshot



2.5M¹

Total Visitors p.a.



7.6M¹

Visitor Nights p.a.



1.4B¹

Total Visitor Expenditure p.a.



33%

Holiday

39%

Visiting Friends & Relatives (VFR)

23%¹

Business

Purpose of Trip



Couples¹

Primary Travel Party followed by groups of friends/extended families



Brisbane¹

Primary Market followed by Regional QLD, Sydney, Regional NSW

Employment

5.9%⁴

1 IN 17

Tourism filled jobs

Visitor Spend is Significant

In terms of Queensland Country's visitor expenditure, the economic contribution for the region, and for Queensland is significant, ranking on par with the Whitsundays, behind major tourism hubs of Brisbane, Gold Coast, Tropical North Queensland and the Sunshine Coast, and double that of Outback Queensland.

Overall, this positioning underscores Queensland Country's importance in Queensland's tourism economy, ranked well ahead of other regional Queensland destinations, showcasing its appeal and the economic benefits derived from tourism activities in the region.



September²

Peak Visitor Season



3 Nights¹

Average Length of Stay



3,555³

Rooms

¹ SQC Regional Snapshot Year Ending Dec 2023, TEQ, March 2024
² Regional market assessment & forecasting, BDA, January 2024
³ Rooms 2019 – BDA, Infographic Input, March 2024
⁴ SQC Tourism Satellite Accounts Tourism Research Australia 2021-22

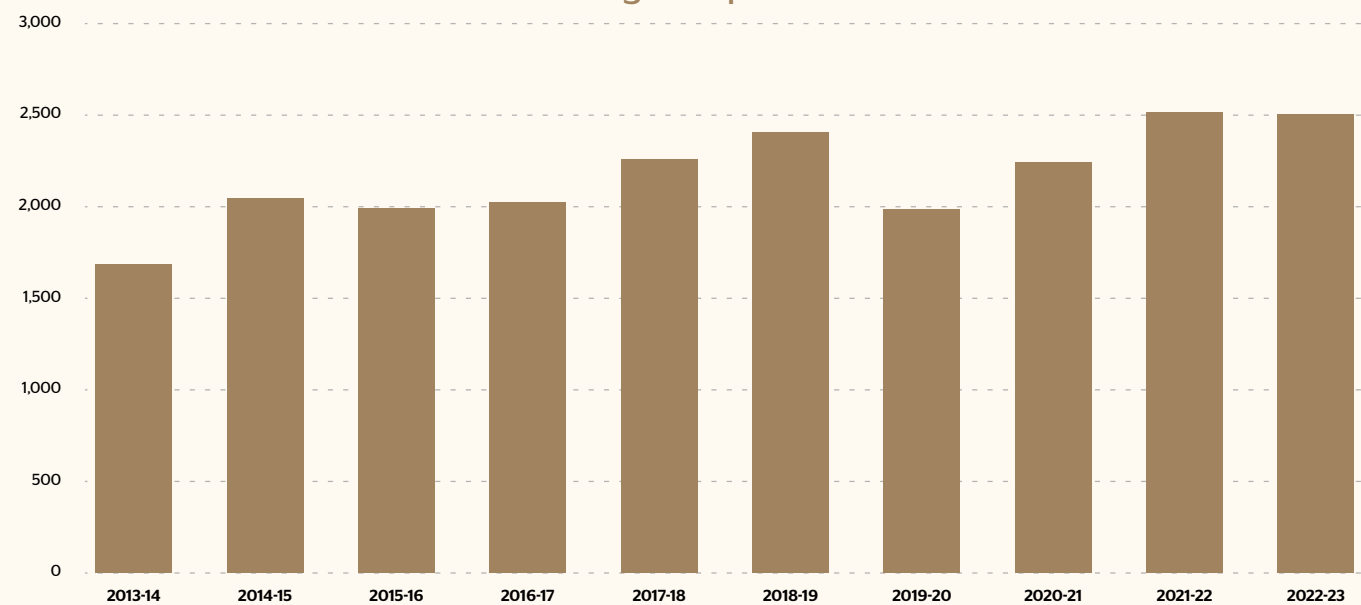
10-Year Trend Analysis

The trend analysis for overnight and day trips to Queensland Country demonstrates over the past decade a consistent upward trajectory.

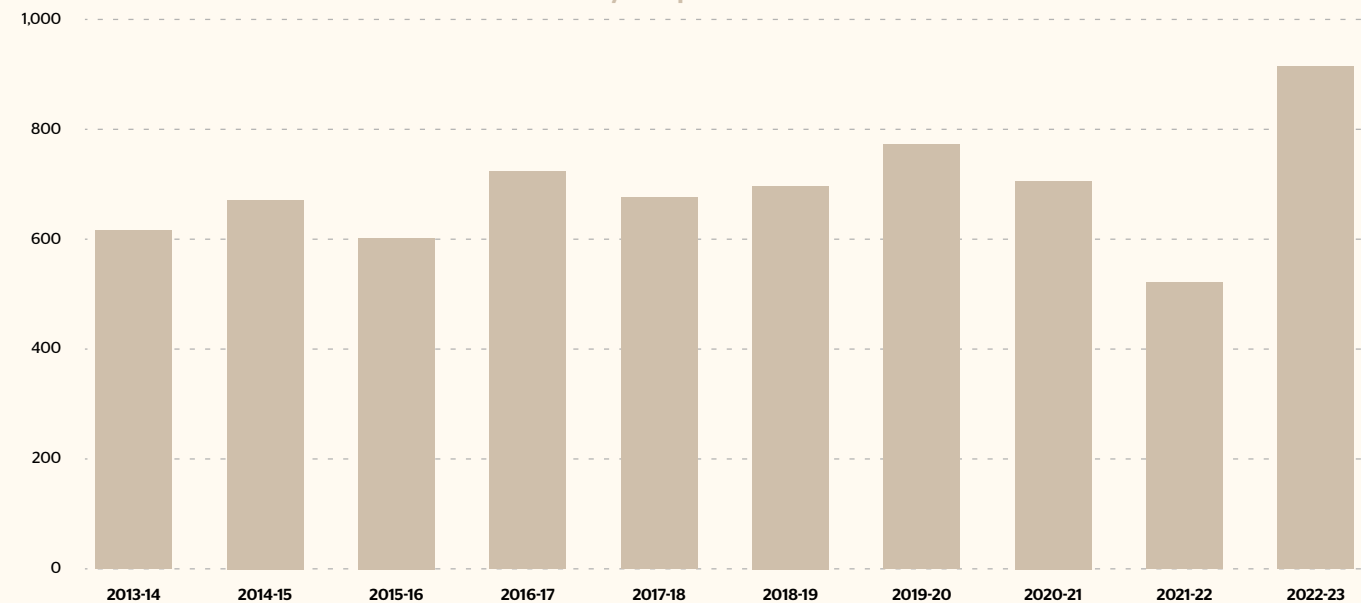
Day trips exhibited a notable rebound in 2022-23 to 915,000, suggesting a resurgence in interest for day-trip excursions, with overnight trips revealing a strong recovery post Covid-19.

The combined effect of the downturn in consumer confidence with the potential plateauing of overnight trips in 2022-23 and a significant increase in day trips during the same period presents the need to further develop overnight visitor experiences, particularly during low and shoulder seasons.

Overnight Trips ('000)



Day Trips ('000)



Source: National Visitor Survey, Overnight Trips, Daytrips, Southern Queensland Country, TRA, Sept 2023
Note: Central Highlands visitation data is not included in analysis.

2032 Target Scenario

In line with the Towards Tourism 2032 (TT2032) state target, the Queensland Country 2032 target is \$1.98B, based on **achieving and retaining** its share of Queensland visitor spend of 4.5%.

2032
Total Spend Target
.....
\$1.98B

To reach this target scenario, would depend on achieving:



Increasing visitor spend by \$0.6B, averaging \$75M per annum



Increasing domestic market share (intra and interstate), with interstate overnight stays increasing from 3.8 to 4.0 nights, requiring 1,761 additional rooms



Road users 3.8M



Increasing domestic aviation seat capacity cumulative growth of 10.9%



Data Input - QC. BDA Mar 2024

Destination Benchmarking

An analysis of competitor destinations including the Hunter, Blue Mountains, Yarra Valley & Dandenong Ranges, Daylesford & Macedon Ranges and Tasmania was undertaken to ascertain Queensland Country's competitive strengths as a destination.¹

More Competitive

- ▶ Higher average length of stay
- ▶ Stronger at attracting holiday visitors to events
- ▶ Relatively strong in the caravan/camping market
- ▶ VFR and business markets are stronger
- ▶ Market share of interstate trips and attracting NZ market is higher

Less Competitive

- ▶ Holiday visitors represent a lower proportion of visitors
- ▶ Attracting fewer affluent visitors, particularly 'Affluent Younger', with expenditure per night lower than most competitors
- ▶ Commercial accommodation (particularly higher grade) less prominent, indicating need for higher grade accommodation offerings to cater for more affluent visitors
- ▶ Excepting events, participation across most activities including food/beverage, attractions and nature/wildlife is lower, indicating need for the development of visitor experiences and attractions



Case Study: Day-Trip Destination

Yarra Valley & Dandenong Ranges is a nationally and internationally recognised wine and nature destination in Victoria, but experiences relatively low visitor spend for interstate and international visitors for a number of reasons:



Close proximity to Melbourne. Their largest market are day trippers.



Their accommodation sector has limited larger accommodation providers with a known brand name influencing packaging/trade opportunities, with most interstate and international visitors overnighing in Melbourne.



High occupancy over weekends, compounding day-tripper market and limiting event development opportunities.

¹ Regional Market Assessment & Forecasting – SQC, BDA Jan 2024

What Makes Us Different?

In light of Queensland Country's significant intrastate market, with fellow Queenslanders accounting for 82% of all visitors, Queensland Country needs to further develop visitor experiences where it excels compared to other Queensland destinations. To further build the Queensland Country brand and remain competitive, the destination's unique selling points provide potential to develop visitor experiences like nowhere else.



Agriculture, Horticulture & Viticulture

In terms of Gross Value Product, Toowoomba & Western Downs are Queensland's top 2 billion-growing regions, with Lockyer Valley the fastest growing region for value of agriculture and the Central Highlands home to the largest number of beef cattle in Australia.

Granite Belt grows all Queensland's apples and most of Queensland's summer food production. Home to Australia's highest wine region with 50+ wineries.

Queensland Country is one of the few places in Queensland where gardens and mass flower planting is prevalent/possible and home to spring wildflowers.

The Great Dividing Range & Climate

Queensland Country sits high on the escarpment of the Great Dividing Range, from its foothills, valleys and beyond.

Many parts of Queensland Country are among the few places in Queensland that experience the four seasons, where Queensland's coolest temperatures are recorded, and the only place in Queensland where it sometimes snows.

Our Competitive Opportunities



Hallmark & Signature Country Events

Compared to other Queensland destinations, and those benchmarked nationally, Queensland Country (QC) excels in events that reflect the climate and culture of the destination. Horticulture, agriculture and viticulture inspired events, from Toowoomba Carnival of Flowers, Stanthorpe Apple & Grape Festival, Chinchilla Melon Festival, Miles Back to the Bush Festival, Emerald Sunflower Festival, Gemfest, Blackbutt Avocado Festival, Gourmet in Gundy and multiple equine events are just to name a few.

Flowers, Wine & Agritourism

Developing year-round experiences based on seasonal production and plantings, e.g. gardens, mass flower plantings, sunflowers, wildflowers (Girraween, Miles/Western Downs) have significant potential for VFR, holiday and business tourism. Such experiences should be developed using the latest sustainable innovations to position QC as a sustainability leader.

QC is one of the closest geographically Australian destinations to South East Asia offering cooler climate, flowers and wine country.



4 Seasons

Where else in Queensland can you experience the four seasons? The weather 'up here' is different and a significant driver for visitation.

The novelty of a cooler climate, a fireplace, autumn leaves and flowers for most Queenslanders cannot be underestimated.

Iconic National Parks

Carnarvon George, Bunya Mountains and Girraween National Parks are strategically located at 'key corners' of the destination, where visitors need to explore and drive through Queensland Country to reach, including the Sapphire Gemfields, one of the largest sapphire areas in the world.

Into the Future

Vision

Queensland Country is renowned for authentic country experiences that embrace the seasons and savour the flavours of one of Australia's most productive regions, fostering deep connections with nature and local communities, transforming the lives of all who visit.

Goals



DESTINATION PROFILE

Build the brand of Queensland Country, appealing to high-value visitors



YEAR-ROUND VISITOR ECONOMY

Enable viable local enterprises and long-term employment through a sustainable year-round visitor economy



SUSTAINABLE TOURISM DEVELOPMENT

Encourage and lead industry sustainable practices, responsible investment and management



SOCIALLY RESPONSIBLE TOURISM

Drive social benefits for local communities, retaining our unique country, rural charm

Strategic Actions

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Our Underlying Philosophy


To warmly welcome visitors to experience the authentic country charm and natural beauty of Queensland Country. To our core, we ensure visitors leave Queensland Country, our natural environment, local communities and themselves transformed for the better. Collectively we achieve leading, vibrant country tourism experiences.


Collective Aspirations


Throughout consultation, opportunities, weakness and gaps were identified as Queensland Country's collective aspirations on what success looks like over the next decade and beyond.

Demand, supply & connectivity

Strategic Themes

 Demand

 Supply

 Connectivity

Retaining country, rural charm. Preservation of green spaces and activation of small towns with unique independent, village character meeting conscious travel and fiercely local travel trends.

Fostering innovation in tourism products and experiences to **target high-yield markets.**

Diverse and quality accommodation offerings and expanding luxury and boutique hotels.

Diversify markets: develop adventure, outdoor and cultural activities appealing to **families and younger demographic.**

Connected, multi-day trails: walking, hiking, cycling and rail trails for active exploration, linking with towns, villages, accommodation and dining.

Improved transport connectivity: increased/reliable air, fast rail to region, and improved intraregional transport, including bus, historic rail, EV infrastructure.

Accessible and inclusive experiences, transport, attractions, accommodation, National Parks and visitor centres for all visitors.

Enhanced infrastructure to support water-based experiences e.g. dams, lakes, rivers, inland fishing, rural and farm-based experiences.

Catalysts for change

Strategic Themes

 Sustainability

 Transformational Country Experiences

Develop year-round visitor economy for sustainable tourism businesses through all-seasons – experience development and year-round calendar of vibrant events, enabling pathways to tourism careers i.e. *year-round visitor economy = sustainable businesses = full-time year-round employment.*

Sustainable growth respecting natural heritage and community values. Commitment to an eco-conscious tourism model, supporting eco-friendly, sustainable tourism initiatives. Prioritising community involvement, promoting the benefits of tourism.

Queensland Country experiences: Further promote and enhance experiences unique to QC.

Offering **authentic farm-to-table dining experiences** that celebrate local produce. Revitalisation of country pubs showcasing local produce. Developing 'signature' Queensland Country food and wine experiences.

Transformational experiences: Development of **immersive cultural and educational experiences** connecting visitors to the land, culture, nature and agriculture.

Nurturing a culture of **wellness tourism** with retreats and natural health experiences.

Emphasising arts and creativity through visitor experiences, regional festivals and events.

Enablers of change

Strategic Themes

 Investment & funding

 Talent & skills

 New ways of working

Facilitate investment for tourism, agritourism, accommodation through **red-tape reduction/one-stop shop approach** and where possible reduce costs/process e.g. PDA development approvals.

Increasing industry capacity, enabling innovation and sustainable practices.

Commitment to an **integrated whole-of-destination tourism industry working in partnership** with a long-term consistent and strategic approach.



Collective Outcomes

In line with our underlying philosophy, we collectively deliver wealth and wellbeing outcomes¹.

Wealth & Wellbeing Outcomes

- 1** Visitor economy businesses prosper, are deeply embedded in and generate wealth for local communities.
- 2** Tourism jobs are highly coveted and inclusive, providing long-term career paths.
- 3** Local cultures thrive, are rooted in community and welcome visitors.
- 4** Tourism operates in harmony with the natural and cultural environment.
- 5** Infrastructure supports the development of sustainable tourism.
- 6** Visitors are transformed by Queensland Country experiences, like nowhere else.

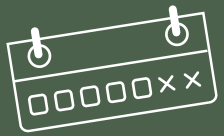


¹ Regenerative Approach to Tourism in Canada, Destination Canada

Target Markets

In line with current origin of visitors and Queensland Country’s competitive advantages, key visitor target markets include:

Target Markets	Geographic Source	Key Experiences
Short-Break	Brisbane/South East Queensland. 400km radius. Wide Bay to Northern NSW. Rockhampton/Central Qld for Central Highlands. Wide Bay to Townsville for Central Highlands International.	QC competitive advantages ▶ Flowers, wine & agritourism ▶ 4-Seasons ▶ Iconic National Parks ▶ Events and festivals. ▶ Sapphire Gemfields
Drive Market Caravan and Camping	Brisbane, Regional Qld. Interstate. International.	Country events and festivals. Nature, National Parks, State Forests.
Business – Meetings, Incentives, Conferences	South East Queensland. Regional Queensland.	Business meetings and events. Incentive offerings specialising in agriculture, horticulture and viticulture and QC competitive advantages.

Market Potential

 SHORT BREAK	 TOURING	 FLY/DRIVE
<p>With population growth predictions of Brisbane and South East Queensland to nearly double from 3.8m to 6m by 2046, Queensland Country is well located to further develop a strong short-break visitor from this geographic source.</p>	<p>On major highway routes, including Australia’s Country Way, Warrego, Leichhardt, D’Aguilar, Brisbane Valley, Gore, Capricorn, Gregory Highways, and the Great Inland Way and the Adventure Way, the domestic and international drive tourism and caravan and campaign markets present major touring opportunities to ensure regional dispersal.</p>	<p>The growth of Toowoomba, Brisbane and Gold Coast airports long-term provide opportunities to grow domestic and international visitation for visitors interested in experiences where Queensland Country has distinct competitive advantages i.e. Festivals and Events, Agriculture.</p>

Visitor Profiles

To assist in understanding domestic market segments, the following summarises Domestic Visitor Profiles from Tourism Research Australia (pre-COVID-19), ideal for Queensland Country. It is recommended to target high-value travellers who are culturally and environmentally aware, to create a greater visitor economy benefit for the destination.

Market Segment	Travel	Season	Age Groups	What They Do	Ave Spend
Short Stay	1-2 nights stay in standard hotels or rented house/ apartment. Self- drive (78%), fly (16%), hire vehicle.	Year-round. Favouring public & school holidays.	20 – 60. Single, couple, friends/family.	Food and drinks, sightseeing, pubs and clubs, shopping, national parks.	\$271 per night \$399 per trip
National Parks & Bushwalking	Self-drive (81%), fly (16%). Half stay VFR or private campground and half in commercial accommodation i.e. hotel/ motel/resort (19%), caravan park/campground (14%), rented house/apartment (12%).	Summer. School holidays.	25-44 (20%). Travelling with children (28%). Adult couples (30%).	Food and drink, tours, shopping. Visit national parks. Bushwalking.	\$228 per night \$895 per trip
Arts & Culture	Day trips, city and regional. Holidays and VFR. Self-drive/fly.	Year-round.	55+. Friends/ relatives, no kids.	Attending museums, theatres, concerts, art galleries/ studios.	\$290 per night \$1,090 per trip
Visiting Friends & Relatives (VFR)	Primarily overnight, regional, intrastate travel. Self-drive.	Summer, Easter.	55+.	Eating out, sightseeing, pubs/clubs, shopping.	\$137 per night \$435 per trip

AUSSIES LOVE NATIONAL PARKS & BUSHWALKING

81%

Domestic visitors went to a national park and/or bushwalking as part of their trip in a regional destination, that's 23% of all domestic overnight trips to regional Australia.

\$228 AVERAGE SPEND PER NIGHT

They source information from direct internet searches, friend & relative recommendations and a mapping website or app.

INCREASING DEMAND IN QUEENSLAND, NOTABLY FROM BRISBANE

'World class nature and wildlife' is the 2nd most important factor for domestic travellers when choosing a holiday destination', TEQ Tourist visitation to National Parks – Domestic. Sept 2021

Queensland experienced 2.5 million overnight and 2.4 million day-trip visitors to national or state parks. Queensland's share of overnight visitors to national parks has increased from 20 per cent in 2019 to 23 per cent, primarily Brisbane and intrastate visitors.

Action Plan & Monitoring

The following Action Plan for Queensland Country's strategic actions will be staged to align with the three phases of Towards Tourism 2032 (TT2032) strategy implementation.

PHASE 1
(2024 – 2026)
Build & Focus

PHASE 2
(2026 – 2028)
Evolve & Transform

PHASE 3
(2028 – 2032)
Accelerate & Shine

Monitoring

To achieve the vision, goals and collective aspirations will require significant collaboration with visitor economy businesses, the public and private sector, local, state and national tourism bodies, land managers and agencies.

The Action Plan should be monitored bi-annually and reviewed annually, facilitated by Queensland Country Tourism.

Stakeholders

Bolded organisations identified in the stakeholder column of the following Action Plan indicate the lead agencies, with collaborators to support and facilitate the action.

ABBREVIATIONS

DTS	Department of Tourism & Sport (Qld)
EA	Ecotourism Australia
LGAs	Local Government Authorities
LTOs	Local Tourism Organisations
QCT	Queensland Country Tourism
TEQ	Tourism & Events Queensland

1 Build the Brand

In the absence of major tourism chains with significant marketing budgets collaboration with strategic partners will be required.

To realise the new Queensland Country brand’s potential, collective marketing spend across the entire destination and leveraging Brand Queensland’s marketing spend will be required to gain greater share of media voice to stay competitive.

The brand and resulting marketing and media campaigns should be developed from a visitor perspective, understanding visitors don’t recognise Local Government Area (LGA) boundaries.

Actions	Partners	Monitoring / KPIs	2024-26	2026-28	2028-32
1.1 QC Brand Playbook including: <ul style="list-style-type: none"> ▶ The unique selling points ▶ Brand Hierarchy – Australia, Queensland, Regional, Local ▶ Brand personality, voice, colour palette, fonts ▶ Creative examples with local/regional application examples to ensure adoption 	QCT, TEQ, LGAs, LTOs, Industry Operators & Event Organisers	Brand Playbook launched and distributed to partners with Brand Toolkit.			
1.2 Digital Brand Toolkit available digitally including branding collateral, e.g. logos, fonts, imagery, footage, word descriptors	QCT	Adoption and use by industry operators, event organisers, LGAs, LTOs.			
1.3 Annual Marketing & Media PR Plan including: <ul style="list-style-type: none"> ▶ target market ▶ media mix, including travel/special interest media /writers/ influencers ▶ action plan and media schedule ▶ cooperative marketing opportunities ▶ campaign monitoring 	QCT, TEQ, LGAs, LTOs, Industry Operators, & Event Organisers	Co-operative marketing investment. Media reach, social media insights and Google analytics.			
1.4 Major Marketing Partners, investigate potential like-minded organisations to partner with campaigns	QCT	Potential partners identified. Partnership agreements in place.			

2 Develop Transformational Experiences

The development of transformational experiences that are “quintessentially” Queensland Country is an important catalyst to realise the destination vision.

Quintessential Queensland Country experiences are those developed on what makes QC different to solidify the destination’s competitive advantage, ensuring they cannot be duplicated or experienced elsewhere. Developing deeply immersive experiences with connection to local culture and natural environment will provide experiences that are transformational.

Actions	Partners	Monitoring / KPIs	2024-26	2026-28	2028-32
2.1 Work with industry and strategic partners to develop new, and elevate existing visitor experiences based on destination’s Unique Selling Points (USPs) with QC Brand Toolkit and TEQ <i>Ultimate Transformational Experience Guide</i> .	QCT, TEQ, LGAs, LTOs, Industry Operators & Events	Increased number of QC experiences			
2.2 Connect industry and event operators with local experts and guides (e.g. land, cultural, arts, nature, farmers, producers, viticulturalists) to help interpret and co-create transformational QC experiences.	QCT, Industry Sector Organisations, LGAs, LTOs, Industry Operators & Events	Identification of local experts / interpreters. No. of co-created QC experiences.			
2.3 Encourage industry and event organisers to participate in the Best of Queensland Experiences Program.	TEQ, QCT, QTIC, LGAs, LTOs, Industry Operators & Events	Increased number of QC experiences listed on Australian Tourism Data Warehouse (ATDW)			
2.4 Encourage industry and events to develop fully accessible experiences.	LGAs, QCT, QTIC, TEQ	Increased accessible QC experiences.			
2.5 Advocate for increased resourcing for long-term Transformational Experiences Programs and incentives for operators.	QCT, QTIC, LGAs, Industry Operators	Pilot program in QC.			
2.6 Encourage packaging of transformational experiences subject to funding resources, engage packaging expert to develop packages to create ‘seamless travel’ (flight/car hire/accommodation) and work with trade/distribution channels, online travel agents.	TEQ, QCT, LGAs, Industry Operators	QC Experiences packaged and in market.			

3 Drive a Year-Round Visitor Economy

For Queensland Country, the tourism industry not only represents one in 17 jobs, but it is also an important sector to diversify the economy, with some sub-regions heavily dependent on one or two industries.

Addressing seasonality will ensure long-term industry sustainability, enabling viable, profitable local enterprises and long-term employment.

Actions	Partners	Monitoring / KPIs	2024-26	2026-28	2028-32
3.1 Encourage/incentivise industry and event operators to develop transformational summer experiences across the destination to rival coastal experiences.	QCT, LGAs, Industry Operators & Events	Increased transformational summer experiences.			
3.2 Dedicated low and shoulder season campaigns, targeted into specific markets for summer and autumn.	QCT, TEQ, LGAs, LTOs, Industry Operators & Events	Cooperative investment. Campaign reach and conversion.			
3.3 Advocate for enhanced infrastructure for fresh water-based experiences e.g. lakes, dams. Encourage local/regional business cases based on industry and community benefits.	QCT, LGAs, LTOs, QTIC, Industry Operators				
3.4 Develop low/shoulder season opportunities and strategies, seeking resources/funding for projects e.g. Dark Sky Sanctuaries.	QCT, LGAs	Resourcing for strategy development. Low/shoulder seasons identified.			
3.5 Promote year-round calendar of events, incentivising low/shoulder season events.	QCT, LGAs, TEQ, Event Organisers	Increased low/shoulder season events.			
3.6 Investigate Business Tourism funding/ resourcing model to develop/facilitate business tourism market sector.	QCT, LGAs, Business Tourism Industry Sector	Viable funding/ resourcing model for Business Tourism.			

4 Grow Industry Capacity

Growing industry capacity will enable experience innovation and encourage leading industry sustainable practices.

Fostering innovation in tourism products and experiences will enable businesses and the destination to attract high-value visitors.

Actions	Partners	Monitoring / KPIs	2024-26	2026-28	2028-32
4.1 Continue to work with industry to identify training/mentoring requirements, partnering to deliver industry capacity building programs e.g. experience development, accessibility, event management.	QCT, LGAs, QTIC, TEQ, Industry Operators & Events	Annual industry capacity building programs in place.			
4.2 Further develop Trade Ready Programs, working with industry to build readiness for domestic and international markets.	QCT, LGAs, QTIC, TEQ, Industry Operators & Events	Increased trade ready Industry Operators and Events.			
4.3 Partner with EA to develop a capacity building programs to enhance operator knowledge and engagement with sustainability principles e.g. Operator EA certifications including Eco, EcoGuide and Respecting Our Culture (ROC), Sustainable Tourism and Climate Change Certification. Embed sustainability measures as part of marketing incentives and funding opportunities.	QCT, EA, LGAs, Industry Operators & Events	Increased quantity of tourism operators using sustainable practices with Eco Certification.			
4.4 Support industry to increase sustainable operations with practical guide to a long-term Net Zero emissions target.	TEQ/DTS, QCT, LGAs, Industry Operators & Events	Practical guide/pathway to long-term Net Zero.			
4.5 Position Queensland Country as a leading sustainable destination through ECO Destination Certification.	QCT, EA, QTIC, TEQ, LGAs	Achieve ECO Destination Certification			

5 Cultivate Collaboration & Collective Investment

Cultivating a culture of collaboration with a long-term commitment to an integrated whole-of-destination approach will enable:

- Increasing QC’s profile as a tourism and event friendly destination,
- Maximising private and public sector return on investment,
- Infrastructure that supports sustainable tourism,
- B2B /town to town referrals increasing regional dispersal, length-of-stay and visitor spend,

Actions	Partners	Monitoring / KPIs	2024-26	2026-28	2028-32
5.1 Establish DMP Steering Group with whole of destination representation to monitor progress	QCT, DTS, LGAs, LTOs	Annual progress reporting.			
5.2 Encouraging all levels of government to facilitate investment for tourism, through red-tape reduction/ one-stop shop approach, particularly to attract investment in accommodation and agritourism.	QCT, DTS, LGAs	Evidenced red-tape reduction & tourism investment incentives.			
5.3 Advocate for planning changes at state level allowing for LGAs to fast-track agritourism experiences in rural areas.	QCT, LGAs, QTIC	Fast-tracking of agritourism experiences in rural areas achieved.			

Actions	Partners	Monitoring / KPIs	2024-26	2026-28	2028-32
5.4 Advocate for increased investment in protected areas and for nature-based walking, hiking, cycling, food/drink and rail trails, linking with towns, villages, accommodation and dining.	QTIC, Protected Area Managers, Landholders, Industry Operators	Increased Protected Area Investment. Evidenced trail enhancement/maintenance, new trails.			
5.5 Advocate for improved inter and intraregional transport connectivity at all levels of government.	QCT, LGAs, QTIC	Identify areas of annual advocacy focus.			
5.6 Encourage Chambers of Commerce/LTOs to facilitate industry operators/sectors to discuss local solutions e.g. for 7-day dining options, referrals etc.	QCT, LTOs, Chambers/ Industry Sector Groups	Local solutions realised.			
5.7 Further develop multi-year partnership agreements with LGAs, LTOs and potential sponsors.	QCT, LGAs, LTOs	Multi-year partnership agreements.			
5.8 Continue to engage with industry sector groups e.g. Study Tourism	QCT, Industry Sector Groups	Evidenced communications.			
5.9 Facilitate greater cross-regional and cross-sector networking with an annual Tourism & Events Symposium.	QCT, LGAs, LTOs, Industry Operators	Attendance and outcomes from Symposium.			
5.10 Increase local community profile of tourism and QCT through media partnerships, guest speaking and widening communications to non-members.	QCT	Increased media profile.			



Introduction

Towards Tourism 2032 is our collective plan to set the direction of tourism in Queensland for the next 10 years. It provides an enduring framework to guide the industry and government partnership to deliver long-term growth and success for Queensland tourism.

Vision

By 2032, Queensland will be Australia's destination of choice for domestic and global visitors seeking the world's best experiences.

Mission

By 2032 we will raise Queensland's profile globally as a visitor destination, encouraging people to visit again and again. We will support our tourism industry to be stronger than ever as they reimagine and reinvent the offerings for the benefit of visitors, our communities, and the environment.

T2032 Target

The Queensland Government have set a goal to inspire travellers to choose Queensland as their destination of choice through bold and globally recognised marketing and events that support growing overnight visitor expenditure to \$44B by 2032.

Catalysts for change

What success looks like for Queensland in 2032

- ▶ Sustainable and regenerative tourism practices in place that support communities and value the contribution visitors make to their environment and lifestyle.
- ▶ Global leader in sustainable tourism and ecotourism experiences.
- ▶ Clear industry pathway towards net zero emissions.
- ▶ Thriving nature-based tourism sector that balances tourism development with environmental preservation, protection and interpretation.
- ▶ Brisbane 2032 supercharges Queensland's reputation as a world-class destination – with a lasting social, economic, and environmental legacy driving long term benefits for tourism. Australia's leading destination for First Nations tourism experiences – showcasing and enriching cultural experiences for visitors and delivering economic opportunities for Traditional Owners, Indigenous communities, Aboriginal and Torres Strait Islander local leaders and businesses.

STRATEGIC THEMES



Sustainability



Brisbane 2032



First Nations

STRATEGIC THEMES



Demand



Supply



Connectivity

Demand Supply and Connectivity

What success looks like for Queensland in 2032

- ▶ Leading destination of choice for global travellers, and the state's destinations are thriving with strong global brands driving our competitive advantage.
- ▶ Strong reputation as an events destination with a calendar of world-class major events, vibrant homegrown events and festivals and business events.
- ▶ Global leader of vibrant, authentic, accessible and transformative visitor experiences – reflecting our natural and cultural values, vibrant communities, and regions, catering for different types of visitors and delivering on our brand promise.
- ▶ Seamless aviation and transport connections to the world. Infrastructure and services meet visitor demands, addressing critical limitations to enable infrastructure investment.

Enablers of change

What success looks like for Queensland in 2032

- ▶ Attractive and internationally competitive environment for tourism investment and development – supported by effective regulatory and planning pathways and sustainable visitor economy funding sources.
- ▶ Highly capable businesses and a skilled, resilient, and world-class workforce who deliver exceptional service and experiences.
- ▶ Highly functioning tourism network – operating as an effective partnership model, employing innovative technology and timely data to enhance service delivery and inform decision-making. Queensland has a reputation for delivering tech wonderment through tourism experiences, events and business practices.

STRATEGIC THEMES



Investment & funding



Talent & skills



New ways of working

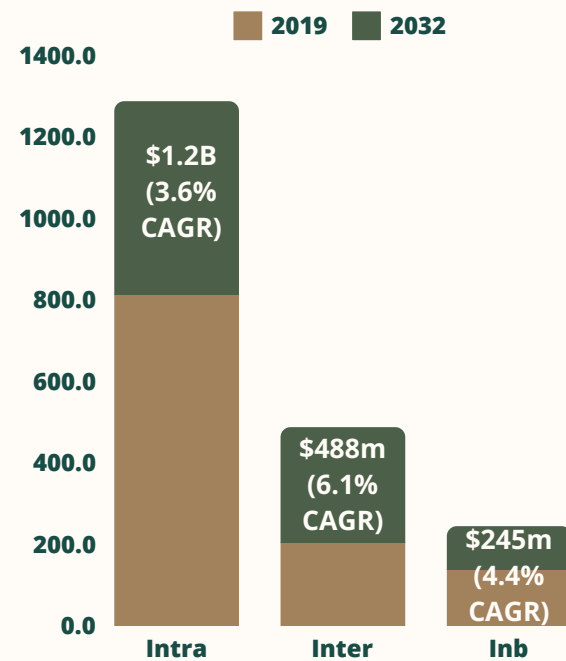
Vision

Queensland Country is renowned for authentic country experiences that embrace the seasons and savour the flavours of one of Australia’s most productive regions, fostering deep connections with nature and local communities, transforming the lives of all who visit.

2032 Target

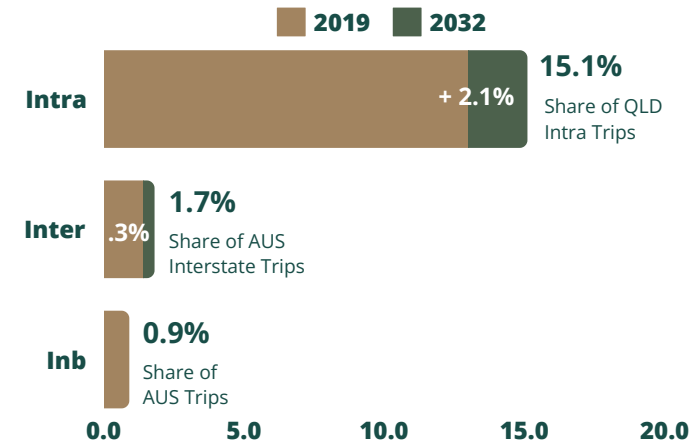
This DMP chapter details the Queensland Country breakdown for \$1.98b in visitor expenditure in 2032, amounting to a 4.5% contribution towards the Queensland target of \$44b. This amounts to a 4.2% compounded annual growth rate (CAGR) from 2019.

\$1.98b Overnight Visitor Expenditure (OVE) 2032



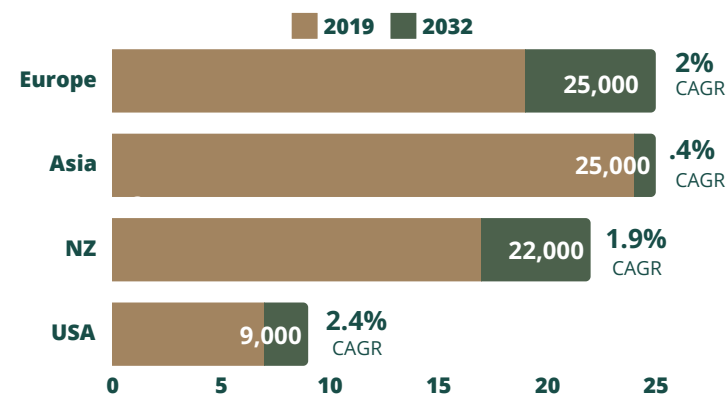
This 2032 target is based on Queensland Country achieving and retaining its share of Queensland visitor spend. This will require increasing visitor spend and domestic market share (intra and interstate) with additional rooms, aviation seat and road capacity to ensure reaching the OVE target scenario.

Share of Trips by Market Origin 2032



Fellow Queenslanders, intrastate travellers, love Queensland Country. With population growth of Brisbane and South East Queensland projected to nearly double by 2046, the destination has the opportunity to harness visitation by developing visitor experiences reflecting its unique cooler climate, four seasons, flowers, wine, iconic National Parks and country events.

Trips by Source Inbound Market 2032 Target



The growth of Toowoomba, Brisbane and Gold Coast airports long-term provide opportunities to grow international visitation for visitors. QC is one the geographically closest Australian destinations to South East Asia offering cooler climate, flowers and wine country.

The 10-year trend analysis for overnight and day-trips to Queensland Country demonstrated a consistent upward trajectory, with a significant growth in day-trips during 2022-23.

Competitor analysis revealed Queensland Country’s competitive strengths in Hallmark & Signature Country Events; Flowers, Wine & Agritourism; the 4-Seasons and Iconic National Parks.

Destination benchmarking identified it was less competitive in

higher-grade accommodation and visitor spend, indicating need for the development of visitor experiences and attractions to meet the needs of high-yield visitors.

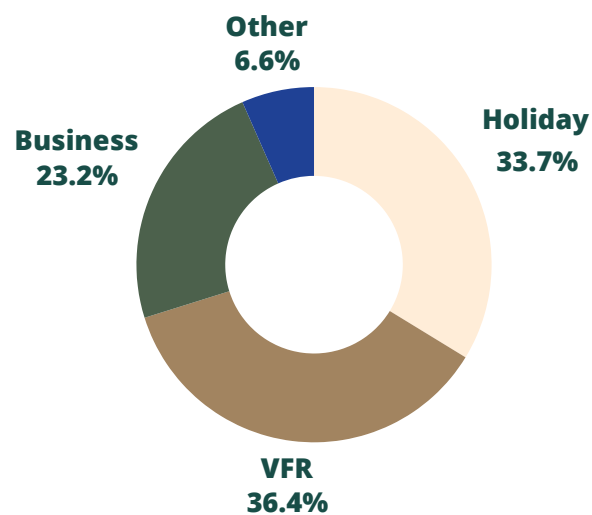
Collective community and industry aspirations want to ensure Queensland Country retains its country, rural charm and greenspaces, particularly in light of urban sprawl and population growth. CQ DMP goals to achieve the 2032 targets include:

1. Profile Destination - building the brand of Queensland Country, appealing to high-yield visitors,

2. Year-Round Visitor Economy - enabling viable local enterprises and long-term employment,

3. Sustainable Tourism Development - cultivating collaboration, innovation and collective investment.

4. Socially Responsible Tourism, ensuring social benefits for local communities.

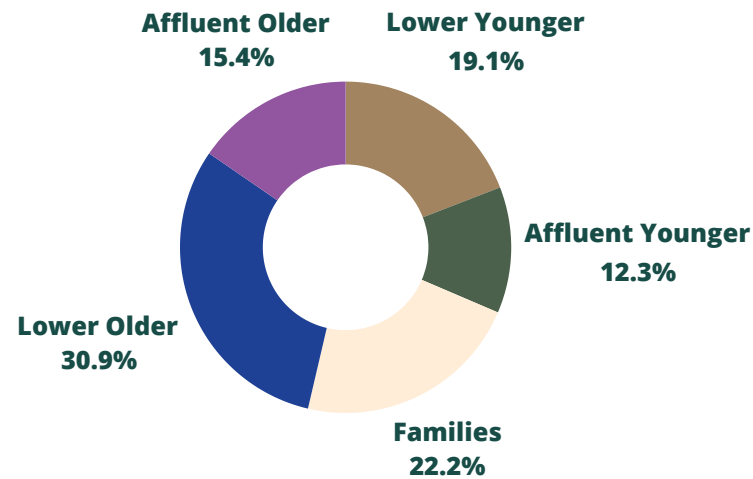


Travel Mix by Purpose 2032

Destination benchmarking revealed QC has stronger VFR and business markets, presenting opportunities for business meetings, incentives and events in agriculture, horticulture and viticulture. A strong VFR market reveals the important role of the local community in profiling and activating the Queensland Country brand, and influence OVE within the destination.

Traveller Profiles Mix 2032

Attracting fewer affluent visitors than benchmarked destinations, QC will need to further develop transformational visitor experiences to meet the needs of higher-yield visitors.



1.1m Additional Annual Road Users 2032



2.8% CAGR
(+43.2%)

Located on major highway routes, including Australia’s Country Way, Warrego, Leichhardt, D’Aguilar, Brisbane Valley, Gore, Capricorn, Gregory Highways, and the Great Inland Way and the Adventure Way, the domestic and international drive tourism and caravan and camping markets present major touring opportunities for Queensland Country, ensuring regional dispersal.

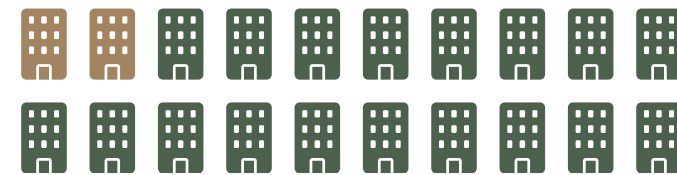
2,433 Additional Monthly Airline Seats 2032



0.8% CAGR
(+10.9%)

Increased airline seat capacity will ensure greater access to and within Queensland Country, particularly for business markets. Fly-drive interstate and international markets provide QC industry with higher-yield market opportunities.

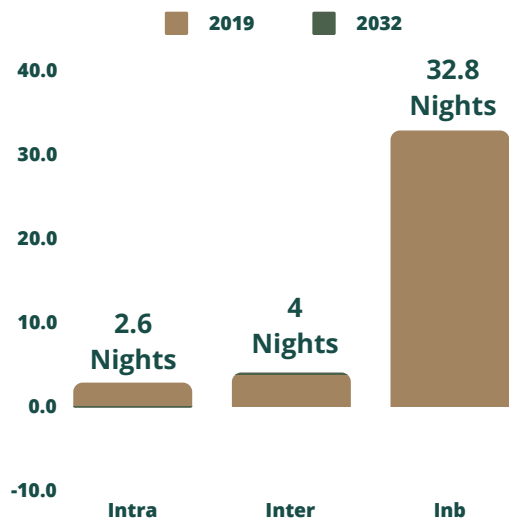
3,151 Additional Rooms Required 2032



5.0% CAGR
(+88.6%)

Destination benchmarking revealed commercial accommodation (particularly higher grade) was less prominent in QC, indicating the need for higher grade accommodation offerings to cater for more affluent visitors. Learnings from Yarra Valley and Dandenong Ranges with limited larger brand name accommodation providers has influenced higher day-tripping, with many interstate and international visitor staying overnight in Melbourne. Collective QC industry aspirations are for diverse and quality accommodation offerings and expanding luxury and boutique hotels.

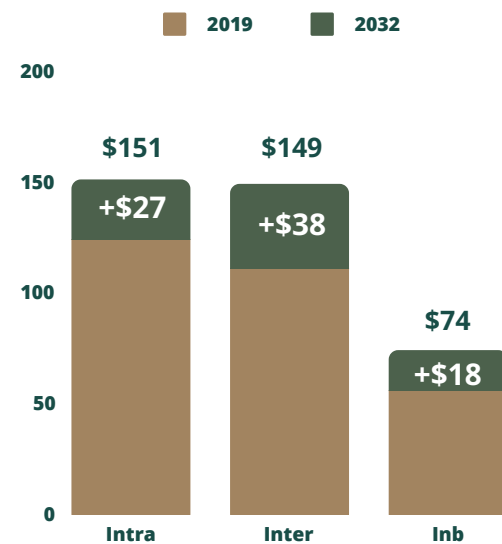
Length of Stay in Nights 2032



Whole-of-destination collaboration, including interregional referrals and packaging will be required to further increase length-of-stay. Collective aspirations by QC industry include connected, multi-day trails: walking, hiking, cycling and rail trails for active exploration, linking with towns, villages, accommodation and dining.

Expenditure Per Person Per Night 2032

Excepting events, participation across most activities, including food/beverage, attractions and nature/wildlife, is lower than many competitors and benchmarked destinations, indicating need for the development of visitor experiences and attractions, unique to Queensland Country to increase expenditure per night, with interstate travellers providing potential growth to 2032.





Queensland
Country
TOURISM

OCTOBER 2024

We extend our heartfelt thanks to the people and organisations who contributed their time, expertise and insights into the development of this Destination Management Plan.