

VISITOR ECONOMY 2031 VISION FOR THE BRISBANE REGION.

SEPTEMBER 2019



Acknowledgement of Country

Brisbane Marketing acknowledges the ongoing connection to country of the traditional custodians of this region and pays its respect to elders past, present and emerging. Our visitor economy is enhanced by its connection to the people and stories of the Aboriginal and Torres Strait Islander people.

Printed on 100% Recycled Paper

Front Cover Image Location: Story Bridge, Brisbane River

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THE VISITOR ECONOMY REPRESENTS ONE OF THE MOST SIGNIFICANT GROWTH OPPORTUNITIES FOR OUR REGION OVER THE NEXT DECADE. THIS GROWTH WILL NOT ONLY SUPPORT OUR BUSINESSES, NEW JOBS AND ECONOMIC GROWTH, BUT ALSO PROVIDES MORE TO SEE AND DO IN THE REGION FOR LOCALS AND THEIR VISITING FRIENDS AND RELATIVES.

CR ADRIAN SCHRINNER
LORD MAYOR OF BRISBANE



Image Location: White Rock, Spring Mountain Conservation Estate, Ipswich

THE OPPORTUNITY.



Image Location: Moreton Island

THE VISION AT A GLANCE.

The Visitor Economy 2031: Vision for the Brisbane Region (VE2031) aims to enhance the contribution of the visitor economy to the region's lifestyle, environment and economy through capturing greater value for our communities and sustainably managing growth.

The Brisbane Region extends from the coastal communities of Moreton Bay and Redlands Coast, through the cities of Brisbane, Ipswich and Logan, to the hinterland of the Scenic Rim, Lockyer Valley and Somerset, and collaborates with the Gold Coast and Sunshine Coast to deliver world-class visitor experiences.

The region is experiencing a once-in-a-generation transformation of the visitor economy with more than \$12 billion of new projects planned and underway. This investment, our favourable subtropical climate, accessibility and connectedness to the rest of the world and our destination appeal provide potential to secure an additional \$6.5 billion p.a. in visitor expenditure, above the \$10 billion forecast spend, by 2031.

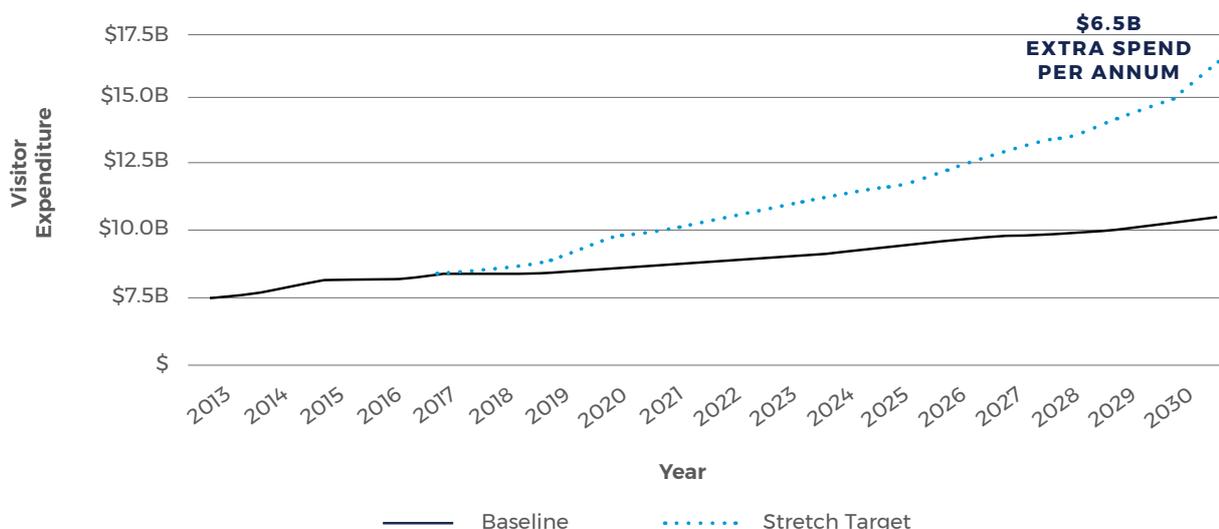
The goals of the Visitor Economy 2031 Vision are to:

- Secure an additional **\$6.5B p.a. in visitor expenditure**, above the forecast growth;
- Deliver significant **benefits to residents' lifestyle** through more experiences and attractions, lifting local support for the visitor economy;
- Deliver **quality visitor experiences** that exceed visitors' expectations and build brand awareness and global advocacy;
- Drive a **positive contribution to our environment** through restoration projects and environmental education;
- **Increase dispersal** of visitation throughout the region, and across South East Queensland positioning the region as a base to explore Australia; and
- Create **lifelong connections** for locals and visitors through our signature experiences.



OUR AIM IS TO BUILD A GLOBALLY RECOGNISED BRAND FOR THE BRISBANE REGION THROUGH REMARKABLE EXPERIENCES, GIVING VISITORS MORE REASONS TO STAY AND SPEND AND CREATE LIFELONG CONNECTIONS.

2031 POTENTIAL IN EXPENDITURE FROM THE VISITOR ECONOMY



THE VISITOR ECONOMY TODAY.

The Brisbane Region currently receives 24 million visitors staying 51 million visitor nights. The graphic shows which visitors are having the greatest impact on visitor nights.

Visitors coming to see their friends and relatives contribute the most visitor nights (35%) and education visitors have the longest average stay accounting for only 4% of visitors but 18% of overall visitor nights. In addition to the importance of nights in region it is important to note that business event visitors spend the most per day and leisure visitors participate in the most experiences.

The Brisbane Region extends east to the blue water of Moreton Bay, south to the Logan and Albert Rivers, north to Pumicestone Passage and west to the foothills of the Great Dividing Range and the Gondwana Rainforest World Heritage Area. It incorporates a network of connected communities across South East Queensland with our partners on the Gold Coast and Sunshine Coast.

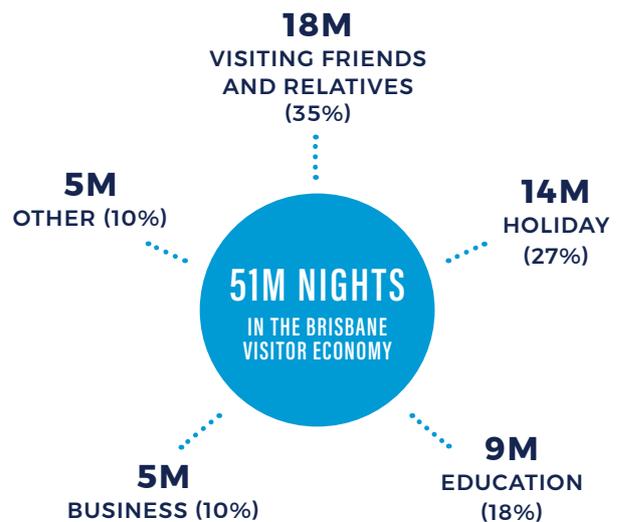
The surrounding regions offer of world class infrastructure, education providers, attractions and events, alongside accessible natural experiences, provides the potential for Brisbane to be positioned as the Asia Pacific's leading New World City.

The benefits of visitation and expenditure extend beyond direct support for employment. The Visitor Economy contributes to:

- Overall positive perception and attractiveness of the city and region as a place to live, work, study and invest;
- The vibrancy and vitality of precincts and entertainment areas; and
- Supporting facilities and programs that are enjoyed by communities as well as visitors.

With 67% of total regional expenditure staying within Brisbane City, the opportunity exists to better disperse visitors.

VISITOR NIGHTS TO THE BRISBANE REGION BY PURPOSE OF VISIT IN 2018



2018 VISITOR DISPERSAL:



THE 2018 VISITOR ECONOMY:



24M
VISITORS
GROWING AT 8%
PER ANNUM



51M
OVERNIGHT
STAYS



2.7 DAYS
ON AVERAGE
IN REGION



\$7.8B
OVERNIGHT
VISITOR SPEND



\$12B
OF INVESTMENT
UNDERWAY



64,700
EMPLOYED

The Brisbane Region's visitor numbers are growing at rates faster than the national average, however, the region converts fewer visitors to overnight stays than other capital cities, and our average length of stay and spend per day are lower.

If the Brisbane Region lifted its conversion spend and stay to the national average, visitors would spend an extra \$12 million per day.



Image Location: Kangaroo Point

UNLOCKING THE REGION'S POTENTIAL.

With its location in the Asia Pacific region, growth in airline capacity and its natural appeal, Brisbane is ideally positioned to experience significant increases in the volume of visitors.

The next decade will see the region transformed, with more than \$12 billion of new projects underway and significant planning in progress for key precincts. Key projects include the addition of more than 5,000 new hotel rooms since 2014, the completion of the Howard Smith Wharves entertainment and lifestyle precinct (\$200 million); Brisbane Airport second runway (\$1.4 billion) and Brisbane International Cruise Terminal (\$158 million) both due in 2020; the Queen's Wharf Brisbane development (\$3.6 billion) and the new Queensland Performing Arts Centre (\$150 million) due in 2022; and transport projects Brisbane Metro (\$994 million) and Cross River Rail (\$5.4 billion) due in 2023 and 2024 respectively.

These projects (shown as 'Growth from Investment' in the graph below) and our existing world-class infrastructure have the potential to drive an **additional \$2.3 billion p.a.** in visitor spend (above the \$10 billion forecast), if effectively leveraged by the region. This includes growing the number of student and business event visitors to the region.

The potential exists to leverage these new projects to create greater destination awareness and encourage additional investment in major attractions and experiences to increase average length of stay, dispersal of visitors and spend per person in the region.

In addition to the impact of additional visitor spend from committed investment, there is an **additional \$4.2 billion of potential spend p.a.** (with \$1.8 billion from longer stays and \$2.4 billion from greater spend per day). That is the equivalent of \$12 million per day, if the region can:



CONVERT JUST 4% MORE VISITORS THAT ARE PASSING THROUGH TO STAYING OVERNIGHT



ENCOURAGE VISITORS ALREADY COMING TO STAY AN EXTRA 0.5 DAYS ON AVERAGE

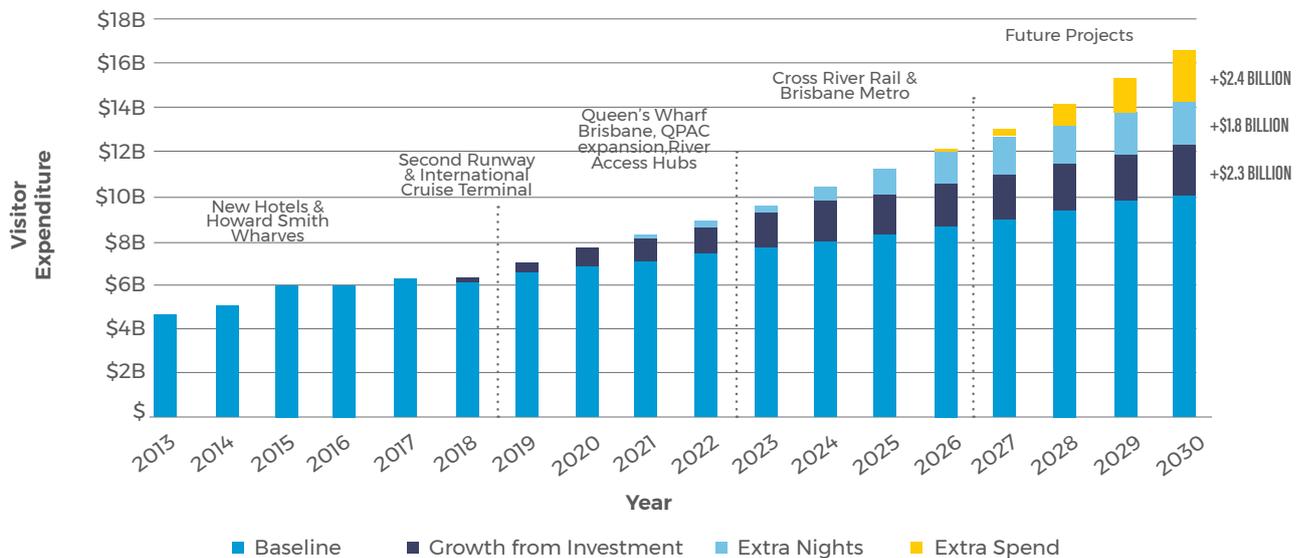


ENCOURAGE 8% MORE VISITORS TO PURCHASE AN EXPERIENCE



LIFT SPEND PER PERSON BY 15% ABOVE FORECAST

2031 VISITOR EXPENDITURE: IMPACT OF INVESTMENT



THE IMPACT.



**ADDITIONAL \$6.5B IN VISITOR SPEND P.A. IN 2031
WHICH COULD BE SPREAD ACROSS:**

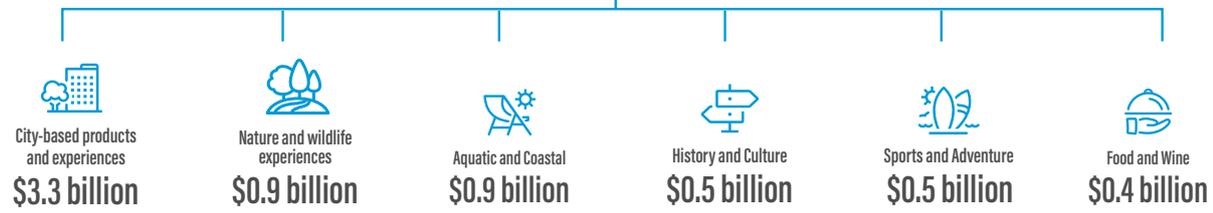


Image Location: North Stradbroke Island

THE VISION.



Image Location: Mount Alford, Scenic Rim

THE 2031 VISION.

The Vision is to be:

A GLOBALLY RECOGNISED DESTINATION KNOWN FOR CONNECTING VISITORS AND THE COMMUNITY WITH ITS ENVIABLE LIFESTYLE, ACCESSIBLE NATURE, REMARKABLE EXPERIENCES, AUTHENTIC CULTURE AND EVENTS, AND RENOWNED FOR BEING SUSTAINABLE, CREATIVE AND RESPECTFUL.

The goals of the Visitor Economy 2031 Vision are to:

- Secure an additional **\$6.5B p.a. in visitor expenditure**, above the forecast growth;
- Deliver significant **benefits to residents' lifestyle** through more experiences and attractions, lifting local support for the visitor economy;
- Deliver **quality visitor experiences** that exceed visitors' expectations and build brand awareness and global advocacy;
- Drive a **positive contribution to our environment** through restoration projects and environmental education;
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OUR AIM IS TO BUILD A GLOBALLY RECOGNISED BRAND FOR THE BRISBANE REGION THROUGH REMARKABLE EXPERIENCES, GIVING VISITORS MORE REASONS TO STAY AND SPEND AND CREATE LIFELONG CONNECTIONS.

THE POTENTIAL 2031 VISITOR ECONOMY:



13M

EXTRA VISITORS
GROWING AT 5%
PER ANNUM



\$6.5B

ADDITIONAL
OVERNIGHT
VISITOR SPEND



48M

EXTRA
OVERNIGHT STAYS
GROWING AT 6%
PER ANNUM



3.2 DAYS

ON AVERAGE
IN REGION



50,000

ADDITIONAL
EMPLOYEES



\$2.6B

ADDITIONAL SPEND
DISPERSED ACROSS
THE REGION

THE 2031 TARGET AUDIENCE.

Targeting High Value Travellers in partnership with industry, the Brisbane Region is expecting an increase in overnight visitors spending more on our signature experiences. This approach aims to achieve the \$6.5 billion additional spend through increasing spend and length of stay, rather than than a focus on volume.

High Value Travellers seek to make an authentic connection with a destination to feel like a local. They spend more per day and stay longer and are more likely to invest in experiences.

While day trips are important, the combined value of international and domestic overnight visitors will contribute nearly 90% of total visitor spend, from 76% of total visitor numbers. These visits will continue to be a mix of visiting friends and relatives (32%) holiday (28%), education (23%) and business visitor nights (17%).

Our visitors will come from the regional drive market (400km radius), interstate capital cities and our six top international markets, with China playing an increasingly important role and strong growth forecast from India, North America, Korea, Japan and the United Kingdom.

KEY CHANGES IN THE 2031 VISITOR MIX.



INTERNATIONAL VISITOR SPEND IN REGION TO INCREASE FROM 34% TO 51% OF TOTAL SPEND

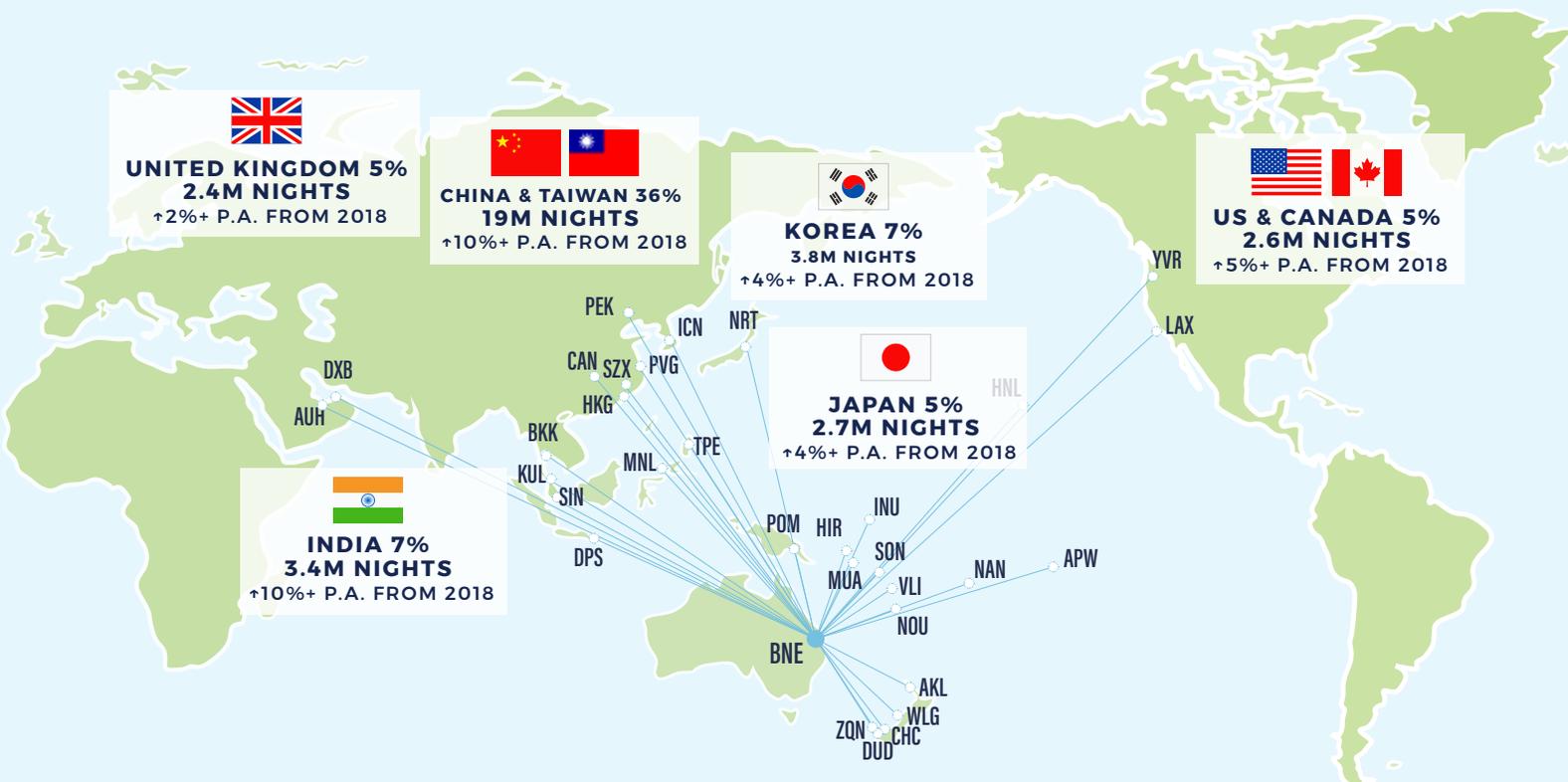


THE EDUCATION MARKET TO GROW FROM 18% TO 23% OF VISITOR NIGHTS



GROWTH FROM CHINA AND INDIA WILL ACCOUNT FOR 78% OF ADDITIONAL INTERNATIONAL NIGHTS

TOP SIX INTERNATIONAL MARKETS: FORECAST SHARE OF TOTAL VISITOR NIGHTS IN 2031



AN EXPERIENCE-LED BRAND.

Brisbane has its own unique and compelling story to tell, and that is exactly what visitors of today are looking for.

In a globally competitive market, the articulation and positioning of the region's unique experiences is what will set Brisbane apart from the pack.

Central to the destination's unique positioning is an authentically-Australian sense of innovation, a spirit of collaboration and optimism, a warm welcome extended to visitors, a range of natural and cultural attractions, and an enviable lifestyle enjoyed by locals.

The aim is for Brisbane to be known around the globe as a world-class place to visit, study, meet, invest and do business.

With nature on its doorstep, clear blue skies, an enviable climate year round and a subtropical alfresco lifestyle, the Brisbane Region and its connections across South East Queensland offers a network of urban centres, each with a relaxed and welcoming vibe – a region that embodies the best of Australia. This story is best told through our *hero experiences* supported by the key destination attributes:

- A subtropical open-air city with a year-round calendar of cultural immersion and significant events;
- Urban adventures and an enviable outdoor lifestyle;
- World-class infrastructure that makes it easy to move around and to soak up the nature on our doorstep;
- Some of Australia's best nature and wildlife experiences in easy reach of a global city; and
- Friendly and welcoming locals who make it easy to make a lifelong connection to Brisbane.

THE HERO EXPERIENCE PILLARS FOR BRISBANE ARE:

AUSTRALIA'S URBAN ADVENTURE CAPITAL



A GLOBAL OPEN-AIR GREEN CITY EMBRACING THE RIVER AT ITS HEART



A PRISTINE BAY OF ABORIGINAL CULTURE AND WILDLIFE



A MAJESTIC RIM OF MOUNTAIN PEAKS, FERTILE VALLEYS AND RAINFORESTS



These hero experiences, along with our events, build on our destination strengths, positioning Brisbane as Australia's Nature Capital. They rely on the region's core and desirable attributes as an open air region, with an enviable lifestyle, a safe, stable and secure economy, world-class infrastructure and home of global talent.

ASPIRATIONS AND PRIORITIES.

If the region achieves its vision, by 2031 the Brisbane Region will have:

- A **clear understanding in our target markets of what the region is known for**, supported by signature experiences that appeal to our target markets;
- **Partnerships** across industry and government to share the story and grow the visitor economy;
- Increased **direct air access** both domestically and internationally;
- A **year-round events program** backed by the infrastructure required to support mega events (e.g. a 2032 Olympic Games);
- More **experiences** that enhance the destination's desirability and keep people in the region longer;
- **Easy access** to anywhere in the destination and across South East Queensland to participate in the region's signature experiences;
- A **skilled and adaptive workforce** and high standards of service quality;
- A **vibrant and creative industry** that is adapting to the changing needs of the global visitor market;
- An enhanced and protected **environment and lifestyle** that visitors are coming to enjoy; and
- A supportive and **welcoming community** that embraces visitors and the visitor economy as part of its lifestyle.

THESE ASPIRATIONS CAN BE SUMMARISED INTO SIX STRATEGIC PRIORITIES:



BUILDING A GLOBALLY RECOGNISED BRAND



UNLOCKING THE POTENTIAL OF AUSTRALIA'S NATURE CAPITAL



AN ACCESSIBLE AND CONNECTED REGION



A VIBRANT AND CREATIVE INDUSTRY



A SKILLED AND ADAPTIVE WORKFORCE



SUCCESS THROUGH PARTNERSHIPS AND COLLABORATION



OUR \$3.6 BILLION INTEGRATED RESORT DEVELOPMENT WILL TRANSFORM BRISBANE WITH A DIVERSE MIX OF NEW RIVERFRONT SPACES; DINING OPTIONS FOR EVERY TASTE AND BUDGET; EXCITING NIGHTLIFE AND ENTERTAINMENT; LOCAL AND INTERNATIONAL RETAIL BRANDS; REPURPOSED HERITAGE SPACES; AND WORLD-CLASS HOTELS. BRISBANE IS PERFECTLY POSITIONED AS A GATEWAY FOR VISITORS FROM ASIA INTO AUSTRALIA."

**GEOFF HOGG, GROUP EXECUTIVE OPERATIONS
THE STAR ENTERTAINMENT GROUP**

GUIDING PRINCIPLES.

The actions required to deliver the 2031 goals and aspirations should adhere to the VE2031 Vision Guiding Principles:

An experience-led approach to increasing global awareness: Showcasing the experiences that celebrate the unique selling proposition of the Brisbane Region is key to building global awareness. An experience-led approach directly linked to increasing spend from key markets to drive demand and convert visitors to overnight stays is crucial to achieving the VE2031 Vision.

Positioning the region as a base to explore, rather than a gateway, to increase stay and spend: By 2031, the region has the potential to secure an additional \$6.5 billion p.a in visitor expenditure, above forecast growth. To drive conversion of visitors passing through into overnight stays, new experiences are needed to enhance the region's desirability, aspirational appeal and provide additional reasons to visit, increase dispersal and capture visitor spend and stay, whilst working in partnership with other leading destinations.

Respect and authenticity are central to the presentation of the region's unique stories: A clear narrative that is owned and shared by communities, businesses and key stakeholders is essential. The region needs to have confidence in its narrative to speak about what is unique and authentic in Brisbane that sets it apart in a way that is culturally appropriate, inclusive and genuine.

Greater dispersal geographically, across the week and the year, and between experiences: Increasing dispersal of visitors throughout South East Queensland is essential if average length of stay and visitor expenditure are to grow.

Shared experiences between visitors and locals to build lifelong connections to the region: Explore new ways to build community support for the visitor economy, building awareness of the sector's contribution to overall liveability, and creating places and experiences that connect locals and visitors. Local communities and visitors will be proud ambassadors for Brisbane as a great region to visit, study, meet, invest and do business.

Lifestyle and environment are protected and enhanced through the visitor experience: The bay, river and hinterland provide the Brisbane Region with a natural advantage. The region needs to develop and create experiences that demonstrate the authentic Brisbane story. Utilising the experience development framework, experiences need to differentiate the region and ensure every visitor connects to the region and its peoples, whilst maintaining the region's unique attributes.

The destination is collaborative, flexible and adaptable: In its response to a changing global landscape the destination must adapt to changes in trends such as disruptions caused by the share economy, world events and rise of the conscious traveller.

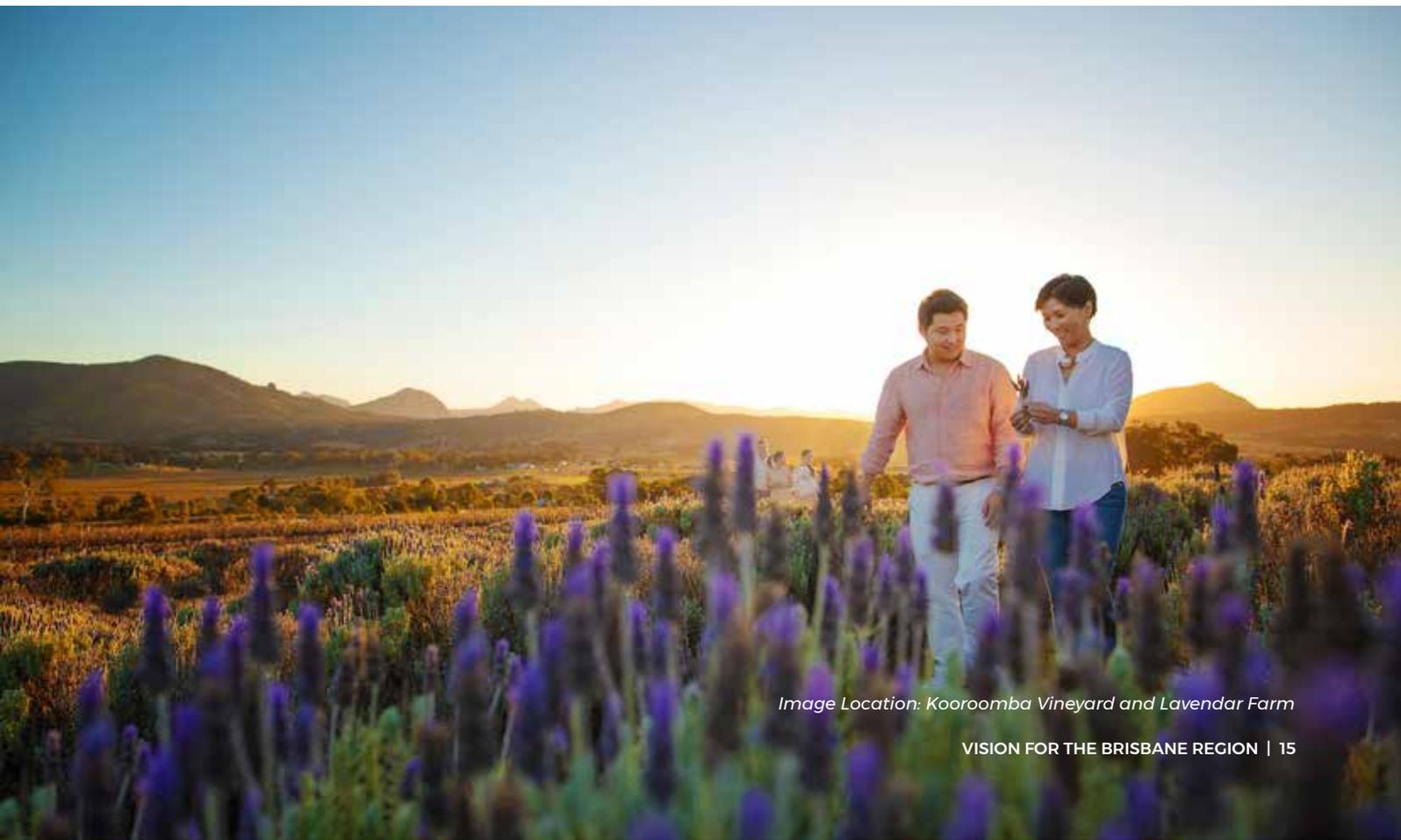


Image Location: Kooroomba Vineyard and Lavendar Farm

THE STRATEGY.



Image Location: Moreton Island

SIX STRATEGIC PRIORITIES.

The Visitor Economy 2031 Vision recognises that a partnership approach is required to ensure the successful implementation of each priority project.

The six key strategies identified under the themes are described at a level that provide an overarching ambition that will direct twelve years of activities from the partners (detailed in three-year rolling action plans, prepared and reviewed annually).





1. BUILDING A GLOBALLY RECOGNISED BRAND.

The Asia Pacific is the world's fastest growing tourism region (7% p.a. to 2031, World Travel & Tourism Council). The Brisbane Region is growing faster than the national average in attracting international visitors (8% growth 2014-18).

Brisbane aims to evolve from its position as a gateway city, by converting a higher proportion of visitors passing through into overnight stays. Brisbane Airport's new runway will provide a similar capacity to Singapore and Hong Kong Airports. Marketing, generating new demand, and route development, delivering increased seat capacity, are key enablers if the potential is to be fulfilled.

Communicating the Brisbane Region's proposition to the identified target markets is essential to increase market share from what is a low awareness base at present. Innovative application of technology, such as creating an on-demand consumer platform for collecting and sharing inspiring content and experiences, will play an important role in sharing our story.



THE BRISBANE REGION IS UNDERGOING A CULTURAL AND SPIRITUAL AWAKENING WITH THE REALISATION THAT ABORIGINAL COUNTRY, CULTURE AND PEOPLE HAVE A CRITICAL ROLE TO PLAY IN THE REGION'S FUTURE. WE HAVE THE POTENTIAL TO BE KNOWN ACROSS THE GLOBE AS A LEADING ECO-CULTURAL DESTINATION WORKING TOWARDS A GLAD TOMORROW.

CAMERON COSTELLO, CHIEF EXECUTIVE OFFICER
QUANDAMOOKA YOOLOUBURRABEE ABORIGINAL CORPORATION

The region needs:

- A **clear narrative** that is owned and shared by communities, businesses and stakeholders;
- The ability to **share the story globally** and with visitors who are in-region;
- To **build support and awareness** for the visitor economy among Brisbane region communities and businesses;
- To **review funding options** that support increased investment in destination awareness, route development and infrastructure;
- Collaborative, connected, and financially supported **destination management strategies** across the region;
- To establish a set of **'points of difference'** backed by signature experiences;
- To **deliver on the region's natural advantage** while continuing to contribute to the Global Sustainable Development Goals and the Commonwealth and State Government sustainable development commitments; and
- Take new, **commissionable tourism products** to the global consumer.

PROJECTS & RESPONSIBILITIES.

1. Building A Globally Recognised Brand - Collaboration is needed across industry, Government and neighbouring regions, to grow the combined effort in building awareness of what the Brisbane Region has to offer to encourage visitors to choose the region as their destination and their first stop in Australia.

1.1 CATALYST PROJECT: Elevate the region’s global profile in agreed priority markets through an increased investment across industry and government partners via a collaborative marketing fund supported by new funding models.



1.2 CATALYST PROJECT: Promote Brisbane as part of iconic Australian journey for key international markets (in partnership with other leading Australian destinations).



1.3 Maximise the impact of marketing investments via an agreed regional narrative and signature experiences and amplify the story of an outdoor city where nature abounds through a new Global Ambassadors’ Program.



1.4 Coordinated marketing efforts in international cities with increasing direct air access to Brisbane including an international sales force and a more coordinated approach to driving awareness of Brisbane and the broader South East Queensland region.



1.5 Develop a clear sustainability agenda for the visitor economy, connected to the region’s narrative, developed in response to the community’s aspirations around improving liveability, and through industry-driven vision and buy-in.



KEY.

<p> Brisbane Marketing</p> <p> South East Queensland Council of Mayors</p> <p> Industry Partners</p>	<p> Tourism and Events Queensland</p> <p> Department of Innovation, and Tourism Industry Development</p> <p> Other Agencies</p>	<p> Local Governments</p> <p> Queensland Tourism Industry Council</p> <p> Lead / joint lead agency for that initiative</p>
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2. AN ACCESSIBLE AND CONNECTED REGION.

Increasing dispersal of visitors across South East Queensland is essential, if average length of stay and visitor expenditure are to increase. Limited transport options and lack of signature experiences have constrained dispersal over the past decade.

The number of visitors arriving by air and by cruise ship is set to double with major investments in infrastructure. Enabling infrastructure to connect the airport and cruise terminals with the city, bay, river and hinterland is vital.

Connectivity for the growing drive market and those looking to explore the region by road will put increasing pressure on road infrastructure and increases the need for commercial tour operators and more innovative transport solutions.

Rivers represent a unique transport option for the region – connecting the bay, the city and the hinterland – and need to be a greater focus for travel along and across.

The aspirations outlined in the *SEQ City Deal* to deliver a 45-minute region applies equally to the visitor economy and the commuter. Ensuring the region has the transport infrastructure and event venues required to support the major events strategy, delivery of the 2032 Olympic Games (if a bid is successful) and providing the required connectivity to the region's visitor attractions and infrastructure is essential.



BRISBANE IS ENTERING AN ERA OF EXTRAORDINARY OPPORTUNITY AND BRISBANE'S NEW RUNWAY IS A CATALYTIC INVESTMENT THAT WILL ENABLE SIGNIFICANT GROWTH IN INTERNATIONAL VISITORS FOR DECADES TO COME.

**GERT-JAN DE GRAAFF, CHIEF EXECUTIVE OFFICER
BRISBANE AIRPORT CORPORATION**

The region needs:

- **New international direct routes and additional airline capacity** from key priority international markets;
- **Connected and accessible transport systems** that support dispersal of visitors across the region (the Brisbane Region and South East Queensland as a whole);
- A **visitor management plan** which addresses the construction disruption in CBD precincts over the next 5-10 year period and identifies solutions for dispersing visitors;
- **Connections and transport options** that unlock the potential of the hinterland, bay and islands;
- Continued **investment in river facilities** for fuelling, sullage and overnight berths, to unlock the river's full potential as a transport artery and visitor experience;
- **Wayfinding and integrated ticketing solutions** that are accessible for visitors and communities;
- To **build itineraries that maximise expenditure** for visitors such as the forecasted growth for the cruise industry;
- Development and promotion of **iconic journey itineraries** which drive dispersal; and
- To ensure that the region has the **transport and venue infrastructure** necessary to attract and deliver the major events program (including a potential 2032 Olympics bid).

PROJECTS & RESPONSIBILITIES.

2. An Accessible and Connected Region - Continued investment is needed in connectivity across the region so that visitors and locals can seamlessly move between transport hubs, accommodation and experiences to spend more time enjoying the things that set the region apart – nature, world-class tourism infrastructure and welcoming and passionate people.

2.1 CATALYST PROJECT: Visitor economy partners will be strong advocates in shaping a successful SEQ City Deal to ensure connectivity of the region for locals and visitors. A gap analysis is required of key transport and events infrastructure needs for the visitor economy to make the connection of the key precincts easy for visitors and building towards a 2032 Olympics bid.



2.2 CATALYST PROJECT: Development of a 2031 River and Bay Activation Strategy that builds on the understanding of forecast demand and unique urban adventures, and the role of the rivers and waterways, and encourage investment in marine infrastructure to support new vessels including fuel, sullage, supplies and overnight berths.



2.3 Continue to build the SEQ Region’s competitive advantage with increasing direct air access through partnership route development funds that grow the Brisbane Region’s share of international visitors and visitor nights in key target markets.



2.4 Work across agencies to deliver more seamless and internationally competitive visa entry conditions, fee structures, visa processing and entry experience for international visitors, students and key workers, including a US Customs Pre-Clearance facility.



2.5 Adopt a proactive approach to regional visitor dispersal through iconic journeys and ongoing experience development. This would include support for the development of new experiences that drive demand; product packaging; working with transport operators and cruise lines; leveraging major and business events; encouraging more visiting friends and relatives and international students; and influencing investment in key infrastructure.



2.6 Adopt a planned approach to connecting visitor precincts with wayfinding and transport infrastructure (bridges, public transport) to precincts that both locals and visitors will enjoy, including new major events infrastructure.



KEY.

 Brisbane Marketing	 Tourism and Events Queensland	 Local Governments
 South East Queensland Council of Mayors	 Department of Innovation, and Tourism Industry Development	 Queensland Tourism Industry Council
 Industry Partners	 Other Agencies	 Lead / joint lead agency for that initiative



3. A SKILLED AND ADAPTIVE WORKFORCE.

A skilled and motivated pool of talent is essential if the region is to deliver on its 2031 visitation and expenditure targets. This starts with the right education providers attracting students and new talent, and then ensuring lifelong learning opportunities and career options exist within the region to attract and retain the best visitor economy workforce and drive industry innovation.

A pool of talent is essential to not only meet future workforce needs but to drive industry innovation and boost the region's intellectual capital and adaptability. International students play a key role in this, not only as a target market and workforce, but in their capacity to contribute to the region's innovation ecosystem and drive future growth potential.

For the region to meet its growth potential and deliver an additional \$6.5B per annum in visitor expenditure, a range of industry capacity building and workforce issues need to be considered. Issues such as visa policy and processes, the attractiveness of tourism and hospitality as a career choice, and delivery of consistent service levels are issues impacting on the region's national competitive advantage.

The region needs to forge closer and more effective links between industry and high-quality education providers. This can help nurture a job-ready workforce and generate research and development support that help drive business-competitiveness through innovation. It is also essential to support a key visitor market, international students, who are a valuable source of expenditure (direct activity and VFR).

Brisbane must maintain its well-earned reputation as a great student city (92% satisfaction) in the face of increasing global competition for international students and the growing popularity of remote learning.

The region needs to:

- **Address the challenge** that tourism is not widely seen as an attractive career option;
- Work with industry and representatives at state and national levels to **ensure that visa policy and processes allow the industry to compete** with other destinations in terms of entry fees and processing times for skilled labour;
- Work with existing and new education and training providers to **ensure the region offers the right mix of research, education and training** to meet the future needs of the region;
- Consistently **deliver excellent levels of service** across tourism and hospitality experiences and **create a new benchmark** for service levels;
- Forge **closer links** between industry and education providers;
- Build a **competitive position as a Top Global Student City** through improved marketing and working with education providers to be responsive to the trend towards online and short course/ micro-credentials;
- Deliver a **better student and overall visitor welcome experience** to showcase the region's unique visitor experiences;
- Develop **comprehensive data collection systems** to inform investment and management decisions; and
- Embrace **technology and new developments** in digital, sharing economies and automation.



THE REGION WILL NEED AN ADDITIONAL 50,000 EMPLOYEES BY 2031 TO BE SUCCESSFUL IN MEETING THE EXPENDITURE TARGETS. TO ACHIEVE THIS BRISBANE NEEDS TO BECOME A HUB FOR GLOBAL TALENT.

PROJECTS & RESPONSIBILITIES.

3. A Skilled and Adaptive Workforce - Adopt a “Team Brisbane” approach to driving innovation, building the future workforce and investing in industry capacity building to deliver the destination experience and create a lifelong connection with the region.

3.1 CATALYST PROJECT: Establish a Queensland Visitor Economy Lab, based in Brisbane, as a collaboration between industry, government and the research community to provide improved research links between industry and the region’s leading education providers, to help the industry have the evidence needed to invest in staying ahead of global changes.



3.2 CATALYST PROJECT: Establish a business scale-up program for the visitor economy with the support of entrepreneur mentors, ambassadors and new project funding sources to encourage businesses to meet the growing market demand.



3.3 Strengthen connections between the tourism, events and education sector to build and upskill the workforce of the future, improve research extension into action, and encourage students to become the investors, ambassadors and entrepreneurs of the future.



3.4 Position Brisbane as a regional talent pool through attracting new globally recognised higher education facilities and business events that extend the reach and frequency of our connections with global education providers and research and development facilities, and leverage our industry growth sectors.



3.5 Invest in ongoing industry capacity building to assist existing businesses to adapt to the current market and create authentic experiences. This includes support for existing cultural facilities and creative organisations to create new commissionable product to increase average length of stay and spend.



3.6 Better inform industry decision making by exploring complementary data sources to develop a more comprehensive data collection system to understand and share visitor trends at a precinct and community level.



KEY.

- | | | |
|---|--|--|
| Brisbane Marketing | Tourism and Events Queensland | Local Governments |
| South East Queensland Council of Mayors | Department of Innovation, and Tourism Industry Development | Queensland Tourism Industry Council |
| Industry Partners | Other Agencies | Lead / joint lead agency for that initiative |



4. A VIBRANT AND CREATIVE INDUSTRY.

With its natural appeal, leading cultural institutions and a creative community, and increasing connectivity to the Asia Pacific Region, Brisbane is ideally positioned to experience significant increases in the volume of international and domestic overnight visitor arrivals.

The principal challenge is in facilitating investment in new and improved experiences that bring the destination to life and generate visitor demand.

The region benefits from a sub-tropical lifestyle as part of its natural advantage, however lacks the necessary range and depth of visitor experiences. Experiences need to be connected to authentic local stories, including those that can cater for large groups.

A proactive approach to facilitating and attracting investment is required to retain our talent and persuade entrepreneurs and creative enterprises to choose the Brisbane Region. Innovative private and public sector solutions are required to support development of compelling business cases and securing funding for new visitor experiences.

The region needs to:

- Take a coordinated approach to **event acquisition and development** including alignment of event infrastructure investment such as a future Olympics bid;
- Attract investment which delivers a **greater range of visitor experiences** that appeal to current and future markets;

- Take a coordinated approach to providing **incentives that attract investment** across the region;
- **Support businesses, creative enterprises and entrepreneurs** to develop new visitor experiences;
- Review the opportunities for an ongoing funding program which supports business cases for **major new visitor experiences**;
- Streamline and wherever possible standardise the approvals process for new experiences to **drive increased dispersal** of visitors throughout the region;
- Encourage more **innovative approaches in the major events sector**, providing essential infrastructure and experiences that can cater for business events and incentive groups of 500+;
- Work with **cultural and creative institutions** to increase their significant contribution to the visitor economy and the future regional narrative; and
- Capitalise on the region's strengths, supporting development in areas such as **First Nations visitor experiences, events and cultural programs** and facilities.



BRISBANE HAS AN UNPARALLELED OPPORTUNITY TO DELIVER NEW VISITOR EXPERIENCES ON THE RIVER THAT BETTER CONNECT THE CITY, THE BAY AND THE HINTERLAND IN A WAY THAT WILL SEE PEOPLE SPEND MORE, DO MORE AND TO SHARE THIS POSITIVE STORY WITH THEIR CIRCLE OF INFLUENCE.

ANDREW MCEVOY, CHAIR
SEALINK GROUP

PROJECTS & RESPONSIBILITIES.

4. A Vibrant and Creative Industry - The region needs to build a clear narrative around its authentic stories, especially Indigenous stories, natural areas and world-class tourism infrastructure including cultural institutions, attractions, accommodation, and support investment in unique experiences and more things to see and do that will encourage visitors to stay longer.

4.1 CATALYST PROJECT: Development of a precinct-based visitor experience management plan to mitigate the disruption to visitor precincts and orientation during construction works and the delivery of major projects.



4.2 CATALYST PROJECT: Create an investment-ready environment to support the development of new attractions and experiences that showcase unique stories of the region and the state (Indigenous, creative, food, nature and adventure).



4.3 Adopt a more coordinated approach across Local and State Government to place design and activation that encourages more flexible use of public spaces to connect locals and visitors in the public realm, including pop-up experiences to showcase the region's advantage as an outdoor city and activate precincts.



4.4 Explore new partnerships with lenders and funding providers to secure support for new projects that encourage visitors to stay longer and create a stronger connection to the region.



4.5 Continue to ensure a clear strategic direction and cooperation on major event development and acquisition and delivery across State and Local Government through the Regional Tourism Organisation.



4.6 Establish a city and region-wide approach to event activation (business and major events). Leverage and maximise the Brisbane Region's competitive advantages to encourage longer stays and greater participation in the region's hero experiences. Support the creation of more innovative experiences and events and temporary visitor experiences through new policy and planning tools.



KEY.

<p>BM Brisbane Marketing</p> <p>SEQ COM South East Queensland Council of Mayors</p> <p>IP Industry Partners</p>	<p>TEQ Tourism and Events Queensland</p> <p>DITID Department of Innovation, and Tourism Industry Development</p> <p>OA Other Agencies</p>	<p>LGs Local Governments</p> <p>QTIC Queensland Tourism Industry Council</p> <p>Lead / joint lead agency for that initiative</p>
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5. UNLOCKING THE POTENTIAL OF AUSTRALIA'S NATURE CAPITAL.

The Brisbane Tourism Investment Study, completed in 2017, indicated that \$800M of the \$6.5B growth potential for the region can be delivered through new nature-based experiences. This economic gain, and the opportunity for dispersal of visitors and associated expenditure, will not be achieved if connectivity is limited and an expanded range of visitor experiences which generate demand are not addressed.

Community support or a social licence for tourism are also increasingly important considerations, particularly as visitor volumes and interest in natural experiences grow. Effective strategic planning requires engagement with communities at an early stage in overall business planning – gaining consensus and building awareness of the benefits of sensitive tourism development.

A wide range of regulatory and legislative protections which govern development in protected and natural areas are in place. Protection of our most precious environments is essential, however complexity of approval processes in coastal and hinterland locations has been a major hurdle in attracting new tourism investment and bringing experiences to market.

There is much commonality in nature-based experiences across the region i.e. authentic food and drink, heritage, walking and mountain biking, Indigenous flora and fauna etc, however planning and co-ordination between partners are disparate. A great example is the opportunity in the food and wine area, with the region surrounded by food growing areas (including the Bay) but that food story is not cohesively shared, and significant policy barriers impede small entrants looking to develop new food tourism experiences.



BRISBANE IS AUSTRALIA'S MOST BIODIVERSE CAPITAL CITY, SURROUNDED BY WORLD HERITAGE RAINFOREST AND A STUNNING BAY OF WILDLIFE AND THE WORLDS OLDEST LIVING CULTURE.

The region needs to:

- Grow visitor numbers and proposals for tourism projects in **natural areas and popular local spaces** requiring visitor management;
- Work with Government departments and management agencies to **review policy barriers** and identify opportunities for streamlining development processes in natural areas;
- Embrace the region's **clean, green and healthy food and beverage sector** and create remarkable visitor experiences and a strong narrative;
- Take a region-wide strategic approach to identifying **nature-based tourism opportunities** – the experiences which will generate demand and drive visitor dispersal;
- Investigate the opportunities for a coordinated package of nature-based product **investment incentives**;
- Realise the potential of nature-based experiences through an **experience development framework**;
- Integrate **social licence and community engagement** into strategic planning for new nature-based tourism development and build awareness of tourism benefits; and
- Encourage the development of **new educational experiences** in nature to maximise the region's competitive advantage of education providers in and close to nature.

PROJECTS & RESPONSIBILITIES.

5. Unlocking the Potential of Australia’s Nature Capital - Work across government and the community to nurture a shared approach to developing and delivering new experiences, supporting new ventures and building confidence in further investment to connect visitors with these experiences.

5.1 CATALYST PROJECT: Develop a digital platform for visitor information and engagement (trade and consumer) that supports development and promotion of the best visitor experiences. Leverage the established sales platforms including a strong connection to locals and use of new technology including augmented and virtual reality.



5.2 CATALYST PROJECT: Collaborative planning and engagement with communities and a supportive regulatory environment to build and maintain support for nature-based tourism investment and activities.



5.3 Finalise and deliver the *Brisbane Region Experience Development Framework*, supported by an accelerator program. Drive the development of new experiences that differentiate the region and provides support to ensure every visitor connects with the unique selling points including wellness, food, music, outdoor lifestyle, emerging technology, creativity and our Indigenous culture.



5.4 A community engagement program around strategic planning for nature-based and food tourism experiences providing an evidence basis for government policy, investment attraction and environmental protection.



5.5 Evolve the region’s visitor centres and online visitor services to better cater for the changing visitor market including international students, business event travellers, incentive groups and High Value Travellers.



5.6 Proactive communications to local communities, businesses and visiting students to build awareness and participation in creative and cultural programs that bring locals and visitors together.



KEY.

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6. PARTNERSHIPS & COLLABORATION.

Effective collaboration is crucial to enabling success across the region's visitor economy. The need for collaborative initiatives and mechanisms which support the growth and management objectives run throughout the key strategic themes of Visitor Economy 2031: Vision for the Brisbane Region.

The need for collaboration between businesses and public sector partners within the city and across the region is essential across all levels.

The partnership framework aims to strengthen the connection between the stakeholders active in delivering visitor experiences including Government, industry and other agencies. At its heart it is a shared vision to inform future collaborative activities.

Developed through extensive consultation, the VE2031 Vision builds on existing local tourism, events and economic development strategies to provide a long-term vision for the visitor economy. This document is supported by an annually agreed three-year action plan negotiated with key stakeholders that addresses the detailed actions to deliver the vision.



MORETON BAY REPRESENTS ONE OF THE BEST OPPORTUNITIES FOR THE BRISBANE REGION TO INCREASE OUR SHARE OF INTERNATIONAL VISITOR NIGHTS. WITH THE NATURALLY WONDERFUL BEAUTY AND THE QUANDAMOOKA CULTURE, REDLANDS COAST, ON BRISBANE'S DOORSTEP, IS SURE TO BE THE NEXT GLOBALLY SIGNIFICANT ECO-CULTURAL DESTINATION.

**CR KAREN WILLIAMS
MAYOR, REDLAND CITY COUNCIL**

VISITOR ECONOMY 2031 VISION PARTNERSHIP FRAMEWORK



PROJECTS & RESPONSIBILITIES.

6. Success through Partnerships and Collaboration - Effective partnerships and collaboration which delivers improved return on investment and delivery of customer-centric investment, policy and marketing programs in a way that is respectful and authentic.

6.1 CATALYST PROJECT: Establish and convene regular meetings of a Tourism Project Reference Group. The group's key mandate is to coordinate agency and community engagement for significant tourism projects with complex approvals and guide the implementation of the Visitor Economy Strategy.



6.2 CATALYST PROJECT: Embrace the authentic Indigenous stories of the region in partnership with Aboriginal and Torres Strait Islander people. Develop an Indigenous Engagement Framework for the region as part of the implementation of the State-wide Indigenous Tourism Strategy.



6.3 Create a Brisbane Region welcome and service culture to encourage the community to welcome visitors. With an increasing focus on cultural connection, deliver visitor experiences in language for first-time visitors to Australia and newly arrived students seeking to connect with the region's story.



6.4 Development of an annual, three-year rolling Action Plan which progresses the key initiatives of the 2031 Visitor Economy Strategy and monitors progress against key performance indicators.



6.5 Development of an annual Policy Agenda with QTIC and the Regional Tourism Organisations to align our efforts around key shared State and Federal policy objectives to drive the visitor economy.



6.6 Coordinated infrastructure planning, experience delivery and marketing through a Visitor Economy focus by the South East Queensland Council of Mayors.



6.7 Effective partnerships across all tiers of Government to create a competitive framework for sector growth which relies on leadership within each agency to take ownership of the actions.



KEY.

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MEASURING SUCCESS.

The key to success in any vision, is to measure progress against clear goals around our global brand, sustainability and economic impact.

The VE2031 Vision aims to:

- Increase awareness and engagement with the Brisbane Brand through positive consumer sentiment (reaching 64% positive by 2031);
- Increasing visitor dispersal across the region, reaching 40% of visitors exploring outside Brisbane City by 2031;
- Increase local satisfaction with the visitor economy from a net score of 43% to 48% (above the State average) by 2031;
- Increase the value of the visitor economy to \$16.5B per annum by 2031;
- Increase the average dwell time in the region to 3.2 days (0.5 days above 2018) by 2031;
- Support nearly 50,000 extra jobs by 2031;
- Increase visitor satisfaction with their experience, measured through the Consumer Sentiment Index; and
- Deliver benefits to the environment locally and globally through adoption of a global destination sustainability benchmark.

Additional research is needed to understand our current brand awareness, and our global ranking against other sustainable destinations.

Progress against the Visitor Economy 2031 Vision goals will be tracked annually and reflected in three-year action plans with short-term targets, reflecting the three-year target intervals outlined below.

These results can only be achieved through a partnership approach.

KEY PERFORMANCE INDICATORS	2018	2025	2031 TARGET
GLOBAL BRAND			
Brand Awareness	Benchmarking to occur in 2020		
Share of Australia's International Visitor Nights	10%	12%	13%
Consumer Sentiment Index	56%	59%	64%
SUSTAINABILITY			
Regional Visitor Dispersal (% of trips outside cities)	30%	34%	40%
Global Sustainable Destination Benchmark	Benchmarking to occur in 2020		
Net Positive Social Impact Score (TEQ Social Indicators)	43%	45%	48%
ECONOMIC			
Overnight Visitor Expenditure	\$7.8B	\$11.5B	\$16.5B
Average length of stay (day and overnight)	2.7	2.9	3.2
Spend per person / per day	\$132.00	\$178.40	\$232.80
Jobs (Tourism Satellite Account)	60,300	81,250	110,000

BRISBANE MARKETING WOULD LIKE TO EXTEND ITS THANKS TO THE FOLLOWING ORGANISATIONS FOR PARTICIPATING IN THE DEVELOPMENT OF THE VE2031 VISION:

Abbey Medieval Festival and Museum
Accor Hotels
Acknowledge Education
Adagold Aviation
Adina Apartment Hotel Brisbane
Adventure Day Trips
Adventure Moreton Island
AHS Consulting
Alcyone Hotel Residences
Alt.vfx
AMP Capital
Any Road
Archerfield Airport Corporation
Aria Property Group
Arkhefield
Arts Queensland
Arup
ASF Properties Pty Ltd
Asian Pacific Group
Aurecon Australia Pty Ltd
Austcham Hong Kong & Macau
Austrade
Australia China Business Council
Australia Zoo
Australian Catering Services
Australian Child Care Career Options
Axcen
Baillie Lodges
Barbossa Bar and Bottle Shop
BDO Pty Ltd
Black & White Cabs
Black Card
Blue Mount Capital
Boggo Road Gaol Pty Ltd
Booking.com
Bray Management
Brisbane Airport Corporation
Brisbane Airport Hotel Group
Brisbane Airtrain
Brisbane City Council
Brisbane City YHA
Brisbane Convention & Exhibition Centre
Brisbane Festival
Brisbane Marketing Board
Brisbane Marriott Hotel
Brisbane Powerhouse
Brisbane Racing Club
Brisbane Riverview Hotel
Brookfield Multiplex
Business South Bank
Capri by Fraser
CAPTA Group
Chalmers Partners
City of Gold Coast
City Parklands
City Smart
City Winery
Climatexperience Brisbane
Cluster Arts
Colliers International
Comfort Inn & Suites Robertson Gardens Brisbane
Committee for Brisbane
Cottee Parker Architects Pty Ltd
Council of Mayors South East Queensland
Cre8tive Property
Cross River Rail Delivery Authority
Customs House
Damarcon
Delaware North
Delectable Tours
Department of Environment and Science
Department of Innovation, Tourism Industry
Development, and the Commonwealth Games
Department of State Development, Manufacturing,
Infrastructure and Planning - Economic Development
Queensland
Destination Brisbane Consortium
Dexus Property Group
Di Marco Group
Directors of the Extraordinary
Eat Street Northshore
Eatons Hill Hotel
Ecotourism Australia
Ecourban
Edition Development Pte Ltd
Electric Bike Tours
Elite Helicopters
Emporium Hotel South Bank
Epicure at Brisbane City Hall
Essence Apartments
Ev Leap
Expedia Group
Fieldworx
Floating Images Hot Air Balloon Flights
Focus Pacific
Founder At CABN
Four Points by Sheraton Brisbane
Gadens Lawyers
Gainsdale
G'day Adventure Tours
Glamxperience
Go Fish Australia
Gold Coast Tourism Corporation
Griffith University
Healthy Land and Water
Hilton Brisbane
Hot Air Balloon
Howard Smith Wharves
Hyatt International - Asia Pacific, Limited
IES College
Inala Wangarra
Inspiring Cities
International River Foundation
Ipswich City Council
ISPT Pty Ltd
Kindred Group
Kokoda Capital Group
KPMG
Laureate Australia and New Zealand
Limoso Luxury Transport
Lockyer Valley Regional Council
Logan City Council
Lone Pine Koala Sanctuary
Lord Mayor's Administration Office
Loud Conferences and Events
Manly Harbour Village
Mantra South Bank
MCI Australia
Merlin Entertainment Group
MG Investments
Minor Hotels
Mirimar Cruises
Mitchell Ogilvie Menswear
Moreton Bay Regional Council
Moreton Bay Region Industry & Tourism
Museum of Brisbane
National Trust of Australia
Next Hotels & Resorts
Novotel Brisbane South Bank
Ogilvy Brisbane
Optus
Orbitz Elevators
O'Reilly's Rainforest Retreat
Otto Ristorante
Out There Cycling Brisbane Valley Rail Trail Tours
Oxley Creek Transformation
Pellicano
Pico Play
Place Design Group
Port of Brisbane
Prestige Day Tours
Prime Square
Property Council of Australia
Pterodactyl Helicopters
Pullman & Mercure Brisbane King George Square
Punthill Brisbane
Pure Projects
Quandamooka Yoolooburrabee Aboriginal Corporation
Queensland Art Gallery | Gallery of Modern Art
Queensland Conventions and Incentives
Queensland Hotels Association
Queensland Maritime Museum Heritage Tours
Queensland Maritime Museum
Queensland Performing Arts Centre
Queensland Tourism Industry Council
Queensland Treasury
Queensland Treasury Corporation
Queensland University of Technology
QueensPlaza
Rarefish PR
RDA Logan & Redlands
Real Estate Institute
Redland City Council
Redlands Kayak Tours
Regional Development Australia
Restaurant and Catering Queensland
River City Cruises
Riverlife
Riverside Marine
Rockpool Dining Group
Romeo
Rousefell Design
Royal International Convention Centre
Royal on the Park
Royal Queensland Golf Club
RPS Group
Running Stream
Rydges South Bank Brisbane
Scenic Rim Brewery
Scenic Rim Regional Council
Scouts Queensland
Sealink
Shakas Adventure Tours
Shangri-La Hotels and Resorts
Shayher Group
Sirromet Winery
Sofitel Brisbane Central
Somerset Regional Council
South Bank Corporation
Sparrowly Group
Spicers Retreats
Spirits of the Red Sand
Sports Analytics
Stadiums Queensland
Stamford Plaza Brisbane
Star Entertainment Group
Stokehouse Q
Story Bridge Adventure Climb
Straddie Kingfisher Tours
Studio THI
Summer Land Camels
Sunlover Holidays
Sunpac
Sunshine Coast Regional Council
Swiss-Belhotel Brisbane
TAFE Queensland
Talk of the Town Storytelling
Tangalooma Island Resort
The Calile Hotel
The Charming Squire
The Ginger Factory
The Henderson Gallery
The Park Hotel Brisbane
The Sebel Brisbane
The University of Queensland
The Vino Bus
The Westin Brisbane
Think Fresh
Three Plus
Tourism & Transport Forum
Tourism and Events Queensland
Tourism Australia
Tourism Noosa
Trade and Investment Queensland
Translink
Treasury Brisbane
TreeTop Challenge
Twenty31 Consulting
University of Southern Queensland
Urban Futures Brisbane Board
Urbanest
Urbis
Vicinity Centres
Village Roadshow Theme Parks Pty Ltd
Virgin Australia
Walk Brisbane
Walkabout Creek Adventures
Walker Corporation
Wallum Partners
Wee Hur Capital
Wheel of Brisbane
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YHA Brisbane

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