



Moreton Bay region

Destination Management Plan

2023 - 2027

Moreton Bay
REGION





ACKNOWLEDGEMENT OF COUNTRY

Moreton Bay Region Industry & Tourism (MBRIT) acknowledge the Kabi Kabi, Jinibara and Turrbal Peoples as the Traditional Custodians of the lands and waterways of the Moreton Bay region, and pay our respects to their Elders, past, present and emerging.

We recognise that the Moreton Bay region has always been a place of cultural, spiritual, social and economic significance to First Nations people.

We are committed to working in partnership with Traditional Custodians and other First Nations communities to shape a shared future that celebrates First Nations history and culture as an irreplaceable foundation of our region's collective identity.

Prepared in collaboration with EarthCheck.

Disclaimer

The DMP contains an analysis of Moreton Bay region's visitor market, conducted through using Tourism Research Australia's (TRA) National Visitor Survey (NVS) International Visitor Survey (IVS) and Tourism Satellite Account data. Unless otherwise specified, all data referenced in the report is from these sources.

Foreword

Moreton Bay Regional Council is embarking on an ambitious plan to increase the accommodation, experiences and value of our tourism region, making it a must see Australian destination. The tourism industry is already a significant economic driver for the region - visitation to Moreton Bay region grew steadily between 2011 and 2020 – an aggregate growth of 57% (an additional 1.6m visitors). As of June 2022, total visitation for the year was 3.5 million – well on its way to building back to pre-pandemic levels.

As the Moreton Bay region continues its growth trajectory, and Queensland looks ahead to the 2032 Brisbane Olympic and Paralympic Games, now represents the ideal opportunity to set out the region's plan for sustainable tourism growth. Council's Tourism Opportunity Plan (TOP) provides strategic direction that will guide tourism and the opportunity it creates for the Moreton Bay region. This Destination Management Plan (DMP), a sister document to the TOP, outlines how the local industry will work together with key stakeholders to support and leverage the TOP's strategic directions and achieve maximum positive outcomes for the industry and the visitor, now and into the future.



*Peter Flannery
Mayor, Moreton Bay Regional Council*

The TOP and DMP have the shared vision to nurture and drive sustainable economic growth in the visitor economy that contributes fully to quality of life for Moreton Bay communities and businesses. Both these plans support the achievement of the Regional

Economic Development Strategy, and put us on a path to achieving a Bigger, Bolder and Brighter future. We will continue to work as #TeamMoretonBay to inspire locals and visitors to explore more of Moreton Bay and create more value and better connections to ensure we are 'games ready' heading into 2032 and achieve lasting tourism legacy benefits.

Thank you to the Moreton Bay businesses and partners who have contributed to the preparation of the region's first Destination Management Plan. The DMP sets out a vision and strategic direction for the tourism industry, identifying the key challenges and opportunities for tourism over the next 5-year period.



*Shane Newcombe
CEO, Moreton Bay Region Industry
& Tourism*

At present, the region is predominantly a day visitor destination. In order to deliver on great fundamentals (accessibility, large nearby source visitor market, strong destination appeal), and positive market trends that are aligned closely with the

region's characteristics as a destination; action in two main areas over the next five year period will be needed.

- › Driving demand in target source markets, focusing on value over volume – overnight expenditure, growing yield, and building awareness around a compelling brand identity. Given constrained commercial accommodation bed capacity in the short term, the region's focus needs to be on extending stay - driving demand into off peak periods, and maximising expenditure opportunities.
- › Building supply to provide a greater depth and range of reasons to visit. This includes essential infrastructure such as an expanded range of hotel accommodation, as well as new nature-based, adventure, agritourism and cultural experiences.

I look forward to continuing MBRIT's great working relationship with industry and Council over the next 5 year period.

Contents

Acknowledgement of Country	2
Foreword	3
01 – Executive Summary	5
02 – Introduction	9
Moreton Bay region's First Destination Management Plan	9
Aligning with Economic Development and Tourism Objectives	10
03 – The Tourism Opportunity	12
The Tourism Attributes of a Fast Growing Region	12
Tourism Opportunities	13
04 – The Tourism Landscape in 2023	15
Trends Impacting on the Tourism Industry	15
Moreton Bay region's Current Visitor Profile	17
Moreton Bay region's Experiences & Identity	20
05 – SWOT	23
06 – The Strategy	24
Vision	25
Mission	25
Growth Themes and Strategic Priorities	25
07 – Targets and KPIs	31
08 – Action Plan	33
Actions: Generating Demand	35
Actions: Compelling Products and Experiences	37
Actions: Game Changers	38
Actions: Creating the Conditions for Growth	41

01 Executive Summary

As the Moreton Bay region continues its growth trajectory, and Queensland looks forward to the Brisbane 2032 Olympic and Paralympic Games, 2023 represents the ideal time to set out the region's plan for sustainable tourism growth in its first Destination Management Plan (DMP).

The Destination Management Plan (DMP) is a strategy for Moreton Bay region's tourism industry. The DMP sets out a vision and strategic direction for the tourism industry:

- › Identifying the key challenges and opportunities for tourism over the next 5-year period
- › Demonstrating how the region will contribute to the regional, national and state tourism objectives set out in the regional destination management plan, *Visitor Economy 2031 Vision for the Brisbane Region*¹, the recently published *'Towards Tourism 2032'* and *'Thrive 2030'* strategy documents and contribute fully to the Moreton Bay region's economic development goals (*Moreton Bay Regional Economic Development Strategy 2020-2041*).
- › Identifying the strategic directions which will support and drive tourism growth.
- › Setting out a program of actions to deliver on the region's strategic tourism ambitions.

This DMP does not sit in isolation - it is a key part of a family of strategies in Moreton Bay region, alongside the *Regional Economic Development Strategy (REDS)*, and *Tourism Opportunity Plan (TOP)*. This family of strategic documents highlights the important role the visitor economy plays in contributing to the regional economy, and identifies the growth potential of the industry, setting out actions which target a step-change in tourism growth.

**Our vision is to nurture
and drive sustainable economic growth
in the visitor economy that contributes
fully to quality of life for Moreton Bay
communities and businesses.**

STRATEGIC FRAMEWORK

The fundamentals are in place for continued growth:

- › Major region-shaping projects in the pipeline include developments such as Caboolture West, The Mill at Moreton Bay (Petrie), Scarborough Harbour and North Harbour, provide backdrops for new opportunities.
- › Straightforward accessibility for our main visitor market in South East Queensland.
- › Direct access from two international airports in nearby Sunshine Coast and Brisbane.
- › Tourism experiences and environments which are well placed to capitalise in market growth trends in areas such as events, nature and adventure, accessibility, health and wellness, First Nations tourism and agritourism.
- › Despite economic headwinds being forecast over 2023, continued strong domestic tourism demand is a positive trend for Moreton Bay region.

¹ Prepared in Brisbane Economic Development Agency (regional tourism organisation for the Brisbane region), Sept 2019

However, at present, the region is predominantly a day visitor destination. In order to deliver on the region's fundamentals (accessibility, large nearby source market, destination appeal), and positive market trends that are aligned closely with the region's characteristics as a destination; action in two main areas over the next five-year period will be needed. As noted in the TOP, a number of opportunities are available to the region:



Driving demand in target source markets, focusing on value over volume – overnight expenditure, growing yield, and building awareness around a compelling brand identity. Given constrained commercial accommodation bed capacity in the short term, the region's focus needs to be on extending stay (i.e., increase length of stay) and driving demand into off peak periods (i.e., mid-week and non-holiday season).



Building supply to provide a greater depth and range of reasons to visit. Alongside essential infrastructure such as an expanded range of hotel accommodation, this includes new nature-based, cultural experiences and agritourism.



The region has a diverse tourism asset base comparable with other destinations in South East Queensland, however, destinations and assets are under-developed or of insufficient scale to be destination differentiators. Between a lack of branded short-term accommodation and latent demand for experiences, including commissionable product, the Moreton Bay region is potentially missing out on \$500 million in lost value from the tourism economy each year.



The proximity and excellent accessibility of Moreton Bay to the Brisbane CBD and Brisbane International and Sunshine Coast Airports provide opportunities for the region to expand its footprint in the Meetings Incentives Conventions and Exhibitions (MICE) market and to better tap into international visitors.

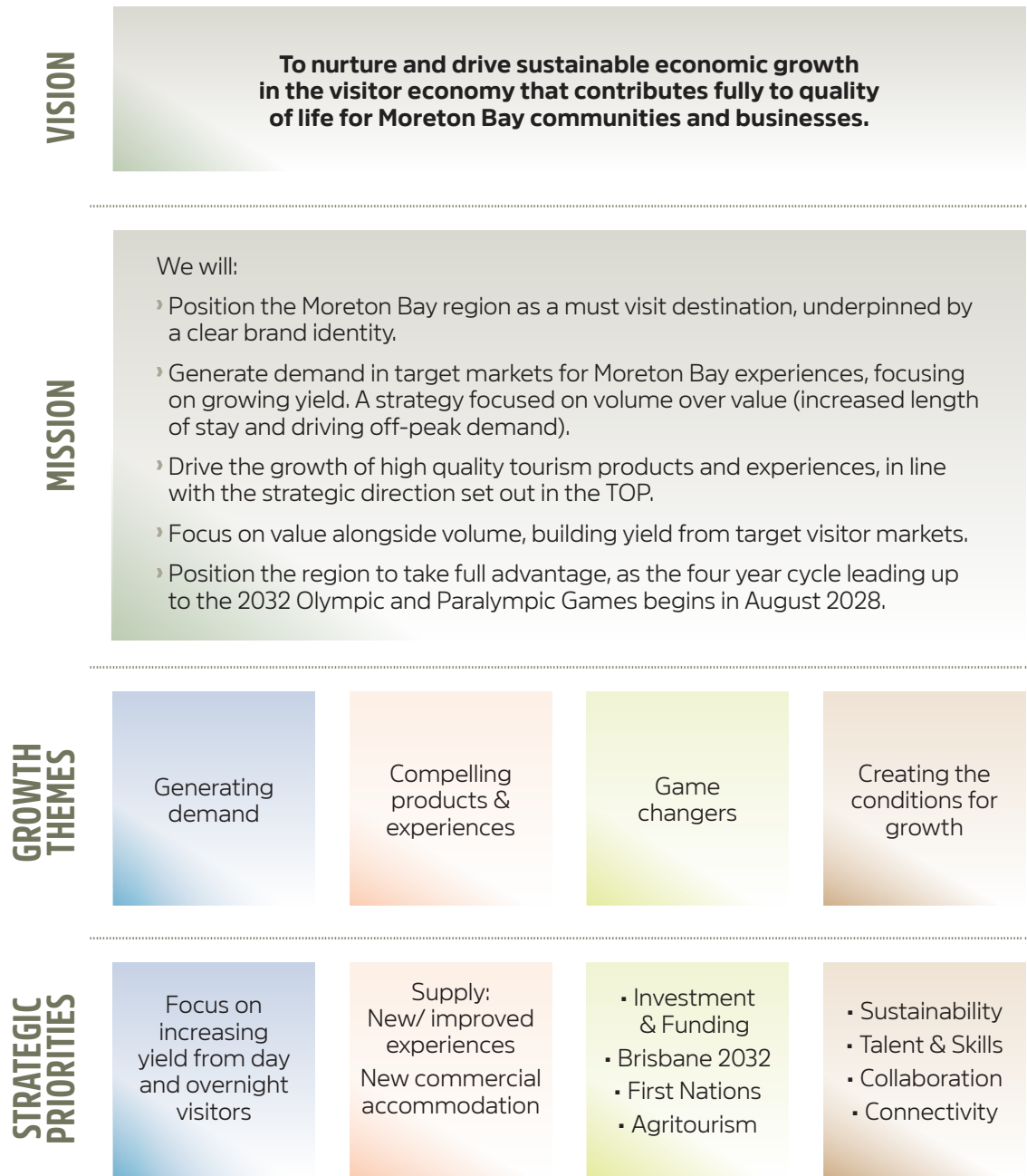
These leading supply and demand growth themes are supported by actions which create the conditions for growth, and gamechanger opportunities which can provide the impetus for the step-change in tourism activity that the region is seeking.

The action plan contained in section 8 of this document set out a series of actions with lead and supporting partners identified, to be delivered over three stages:

- Phase 1: Build and Focus (2023-2025)
- Phase 2: Evolve and Transform (2026-2028)
- Phase 3: Accelerate and Shine (2029-2032)

With the DMP being a five-year plan, actions are primarily focused on Phase 1 - Build and Focus, and Phase 2 - Evolve and Transform stages, forming the basis for continued action to support Phase 3: Accelerate and Shine, as the region moves towards 2032.

Figure 1 Strategic Framework





02 Introduction

MORETON BAY REGION'S FIRST DESTINATION MANAGEMENT PLAN

As the Moreton Bay region continues its growth trajectory, and Queensland looks forward to the Brisbane 2032 Olympic and Paralympic Games, 2023 represents the ideal time to set out the region's plan for sustainable tourism growth in its first Destination Management Plan (DMP).

Informed through extensive consultation with the region's tourism industry and key partners, the DMP sets out a vision and strategic direction for the tourism industry:

- › Identifying the key challenges and opportunities for tourism over the next 5-year period.
- › Demonstrating how the region will contribute to the national and state tourism objectives set out in the 'Thrive 2030' and 'Towards Tourism 2032' strategy documents, and contribute fully to the Moreton Bay region's economic development goals (*Moreton Bay Regional Economic Development Strategy 2020-2041*).

- › Identifying the strategic directions which will support and drive tourism growth.

- › Setting out a program of actions to deliver on the region's strategic tourism ambitions.

This DMP does not sit in isolation - it is a key part of a family of strategies in Moreton Bay region, alongside the *Regional Economic Development Strategy (REDS)*, and *Tourism Opportunity Plan (TOP)* (Figure 2).

The DMP and the TOP have the shared vision to

'nurture and drive sustainable economic growth in the visitor economy that contributes fully to quality of life for Moreton Bay communities and businesses.'



Figure 2 Moreton Bay region strategic document relationship

ALIGNING WITH ECONOMIC DEVELOPMENT AND TOURISM OBJECTIVES

The DMP functions within a broad policy framework, including Federal, State and Local Government. Table 1 contains an overview of key strategies and policies that help frame tourism objectives for the Moreton Bay region. This is not an exhaustive list of policies and strategies. This DMP positions Moreton Bay region to deliver against the tourism objectives set out in this framework. Throughout this document, references are made to the *Tourism Opportunity Plan (TOP)*, *Visitor Economy 2031: Vision for the Brisbane Region*, *Towards Tourism 2032*, and *Thrive 2030* documents.

Table 1 Overview of key strategic plans



Regional Economic Development Strategy – *Moreton Bay Regional Council*

The Regional Economic Development Strategy 2020-2041 (REDS) outlines Moreton Bay region's economic growth for the next 20 years, focusing on collaboration, innovation, resilience, and sustainability. It aims to double the current economy size, reaching \$40 billion by 2041; create 100,000 new jobs and 16,000 new businesses. The REDS outlines four key industry pillars that will drive future economic growth including Knowledge, Innovation & Entrepreneurship; Food & Agribusiness; Advanced Manufacturing; and Tourism, Events & Sport. The identification of the visitor economy as a key strategic sector demonstrates the importance of this industry to the local economy. This DMP is a key contributor to the key strategies outlined in REDS, further supporting the action plans that are underpinned by the strategic document.



Tourism Opportunity Plan – *Moreton Bay Regional Council*

The Tourism Opportunity Plan 2022-2027 (TOP) sets out our visitor economy vision. It has been developed to nurture and drive sustainable economic growth that contributes fully to quality of life for Moreton Bay communities and businesses' sustainability. The plan provides strategic direction to guide tourism and the opportunities it creates for the Moreton Bay region. This DMP compliments and supports the input from the TOP as a sister document. The DMP addresses priorities and themes identified highlighting the key investment priorities and support for streamlining the development process.



Visitor Economy 2031: Vision for the Brisbane Region – *Brisbane Economic Development Agency*

Brisbane tourism region's Visitor Economy 2031: Vision for the Brisbane Region, aims to enhance the contribution and value of the visitor economy to the region's lifestyle, environment, and economy, by capturing greater value for local communities and sustainably managing growth. On a global level, it aims to grow Brisbane's tourism offerings as a recognised brand through remarkable experiences, giving visitors more reason to stay, spend and create connections. The Brisbane region has a \$12 billion pipeline of projects, creating a unique opportunity to transform and enhance the visitor economy. The DMP is aligned to contribute to the targets set by this strategic plan.



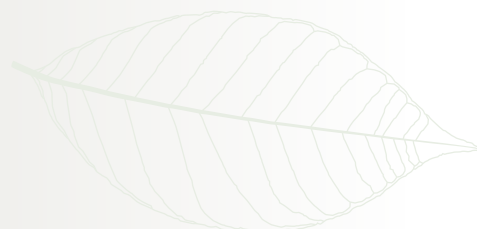
Towards Tourism 2032 – *Queensland Government, Department of Tourism, Innovation and Sports*

As the leading tourism policy for the State, the DMP will align to the pillars Demand, Supply and Connectivity; Catalyst for Change; and Enablers of Change and align actions according to the three phases to rebuild and revitalise a better Queensland tourism industry. Moreton Bay region is in position to contribute to all actions within the State plan through the alignment of this DMP and support of Council. The document sets an ambitious target for overnight visitor expenditure to reach \$34 billion per annum by 2027, and \$44 billion per annum by 2032.



Thrive 2030 – *Austrade*

The Federal framework has a strong focus on recovery, capacity building and resilience of the visitor economy through the three themes: collaborate, modernise, and diversify. Whilst on a national scale, the DMP aligns with the seven priority areas of growth that aims to deliver high-quality experiences and products, industry connectivity and collaboration, and development pathways for workforce.



03 The Tourism Opportunity

THE TOURISM ATTRIBUTES OF A QUICKLY GROWING REGION

Moreton Bay region is one of Australia's largest and fastest growing areas with over 2,045km² of land and 294km of coastline and waterways. The region is leading the way in population and economic growth in Queensland². The region is working towards doubling its economy, aiming to reach \$40 billion by 2031, creating 100,000 new jobs and 16,000 businesses³. Tourism, sports, and major events is one of four key priority industries identified as being instrumental in reaching these targets.

As a large region, Moreton Bay boasts a range of distinct destination experiences, including coastal life in Redcliffe and Bribie Island, through to hinterland and nature-based experiences in Samford, Dayboro and Woodford. Events, arts and culture, sports, and nature-based/ adventure experiences lead the opportunities currently available to visitors. Key characteristics as a visitor destination include:

- Moreton Bay region is famous as the home of a number of major events including Moreton Bay Food + Wine Festival, Tastes of Moreton Bay Festival, Woodford Folk Festival, Redcliffe KiteFest, Jetty2 Jetty, Abbey Medieval Festival, and the Oyster & Seafood Festival, all currently attracting year-on-year growth in visitor participation.
- Moreton Bay region is a proud and innovative leader when it comes to delivering accessible travel and inclusive facilities to locals and visitors, alike. A range of itineraries and experiences are available to visitors www.accessible.visitmoretonbayregion.com.au/things-to-do.
- Further experience development across nature-based, agritourism and arts and culture are well within reach to further heighten the experience offerings. Moreton Bay region contributes strongly to the Brisbane region's overall tourism appeal, including a robust and diverse events program, and nature-based opportunities that its bayside and hinterland provide.

COVID-19 impacts led directly to turbulence in visitor numbers between 2020 and 2022. As of June 2022, total annual visitation was 3,539,000. This figure represents a 10% decline in visitation from June 2020, however, strong performance and trading data indicates that the region is well on its way to recovering to pre-pandemic performance levels.

TOURISM OPPORTUNITIES

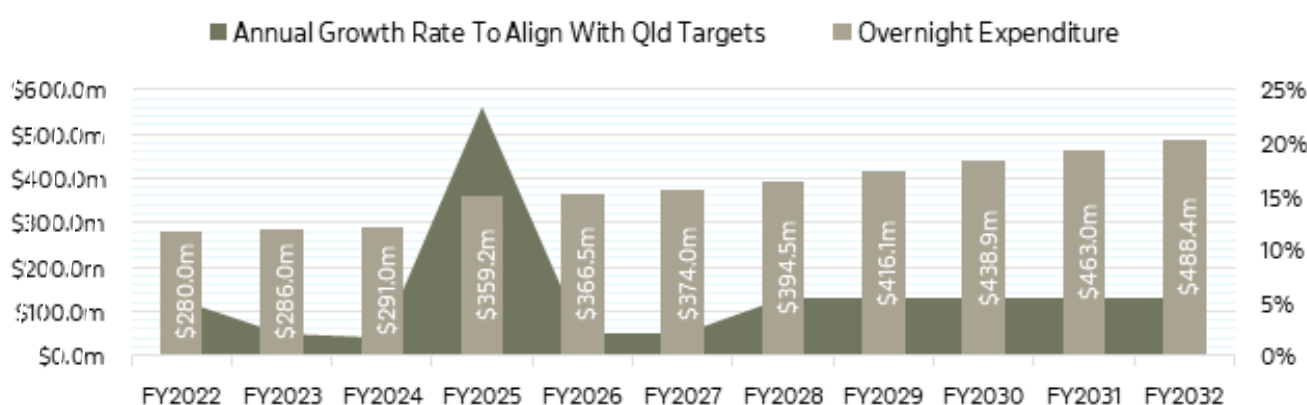
The tourism industry has been through a tumultuous period since 2020, however, businesses have shown remarkable resilience, emerging in a strong position to take full advantage of new opportunities, as Queensland looks towards the Brisbane 2032 Olympic and Paralympic Games. The Towards Tourism 2032 strategy notes that the Queensland's tourism industry aims to restore peak market share by 2023, before reaching for the interim aspiration target of \$34 billion in overnight visitor expenditure by 2027 and growing further to \$44 billion by 2032.

Moreton Bay Region's Contribution to Queensland Tourism Growth Aspirations

In June 2022, Moreton Bay region saw annual overnight expenditure reach \$280 million (Figure 3). If, as a minimum, Moreton Bay region maintains its current share of the State's overnight visitor expenditure (1.1%), growth requirements for the region to align with Queensland targets would be:

- 2024 – Reach pre-COVID-19 levels of overnight expenditure to \$291 million (FY19), a 3.9% increase.
- 2027 – Reach overnight expenditure of \$374 million. Queensland total overnight expenditure reach \$34 billion.
- 2032 – Reach overnight expenditure \$488 million. Queensland total overnight expenditure reach \$44 billion.

Figure 3 Moreton Bay region overnight expenditure growth required to align with the 'Towards 2032' growth aspirations



In partnership, industry and government are committed to driving growth, however, the scale of this aspiration is significant. The growth necessary from 2024 onwards is substantial for the whole of Queensland, and for Moreton Bay if it is to maintain its contribution to state targets.

In particular, the modelling assumes a step-change in growth in 2025, based on the twin assumptions of domestic performance being maintained and the Chinese market returning at pre-pandemic levels.

The fundamentals are in place for continued growth:

- › Major region-shaping projects in the pipeline include developments such as Caboolture West, The Mill at Moreton Bay (Petrie), Scarborough Harbour and North Harbour, provide backdrops for new opportunities.
- › Straightforward accessibility for the region's main visitor market in South East Queensland.
- › Direct access from two international airports in nearby Sunshine Coast and Brisbane.
- › Tourism experiences and environments which are well placed to capitalise in market growth trends in areas such as events, nature and adventure, accessibility, health and wellness, First Nations tourism and agritourism.
- › Despite economic headwinds being forecast over 2023, continued strong domestic tourism demand is a positive trend for Moreton Bay region.

As noted in the TOP, a number of opportunities are available to the region:



Driving demand in target source markets, focusing on value over volume – overnight expenditure, growing yield, and building awareness around a compelling brand identity. Given constrained commercial accommodation bed capacity in the short term, the region's focus needs to be on extending stay and driving demand into off peak periods (i.e., mid-week and non-holiday season). The TOP identifies that there is enough demand to support the development of up to eight (8) internationally branded hotels with a total of 1,235 rooms over the next decade.



Building supply to provide a greater depth and range of reasons to visit. Alongside essential infrastructure such as an expanded range of hotel accommodation, this includes new nature-based, cultural experiences and agritourism. To this end, the TOP identifies up to 67 potential new or expanded tourism opportunities (requiring a total of \$200 million in public and private investments).



The region has a diverse tourism asset base comparable with other destinations in South East Queensland, however, destinations and assets are under-developed or of insufficient scale to be destination differentiators. Between a lack of branded short-term accommodation and latent demand for experiences, including commissionable product, the Moreton Bay region is potentially missing out on \$500 million in lost value from the tourism economy each year.



The proximity and excellent accessibility of Moreton Bay to the Brisbane CBD and Brisbane International and Sunshine Coast Airports provide opportunities for the region to expand its footprint in the Meetings Incentives Conventions and Exhibitions (MICE) market and to better tap into international visitors.



04 The Tourism Landscape in 2023

TRENDS IMPACTING ON THE TOURISM INDUSTRY

A series of pre and post pandemic trends will shape tourism over the coming years:



SUSTAINABILITY

There is increasing consumer awareness around sustainability with growing environmental and social concerns globally. This has influenced people's interest in managing the planet and adopting more sustainable habits, championing brands that follow suite.



AUTHENTIC FOOD AND DRINK

Gastronomy, wine/craft beverages and agritourism are continuously growing in importance for all destinations.



HEALTH AND WELLNESS

People have become more mindful of their own health post-pandemic. A holistic perspective which incorporates spa and beauty, community engagement, relaxation, visitors reconnecting, and meaningful experiences, opens up opportunities.



DIGITAL DISRUPTION

Through keeping up to date with itineraries, accessing booking information, travel information and making payments, consumers are never far from their digital device. If new uses of technology are to be leveraged, as a minimum, high standards of digital connectivity are a must, alongside improved skills in the use of digital platforms and technologies.



CONTINUED GROWTH IN DEMAND FOR NATURE-BASED EXPERIENCES

Nature-based and cultural experiences continue to experience year-on-year growth in popularity. Increased appetite for wide open spaces and the rejuvenating benefits of outdoors lifestyle is leading demand for many destinations.



RISING UNCERTAINTIES

Continued volatility, economic pressures, and international conflicts and events nations will continue to shape tourism industry performance. An extremely competitive marketplace will exacerbate challenges as destinations domestically and globally compete for returning visitors.



ACCESSIBLE AND INCLUSIVE DESTINATIONS

A foundation of great service is the principle of inclusiveness, where visitors of abilities feel welcomed to destinations. Accessibility and inclusiveness are now recognised as priorities for the visitor economy throughout Australia and Queensland.



DEMOGRAPHIC AND SOCIAL CHANGE

Major demographic changes driving opportunities and challenges for tourism. An aging population means accessibility will be a consideration for all destinations. By 2025, millennials will account for 50% of international travellers, and millennials are also expected to account for 50 cents in every tourism dollar spend globally by 2026.



CONTINUED INVESTMENT

Despite COVID-19 disruption, investment in infrastructure and tourism experiences remains strong. As of 30 June 2021, there were 33 major tourism projects under development in Queensland totalling \$6.7 billion, most of which were in the arts, recreation and business services sectors. The 2032 Brisbane Olympics and Paralympics will drive additional opportunities.



SELF-DRIVE AND TOURING WILL CONTINUE TO BE KEY MARKET SEGMENTS

COVID-19 travel restrictions boosted the appeal of self-drive holidays, and the increasing diversity of camping, glamping and caravanning has created new opportunities. Alongside continued popularity of 4WD, self-drive travellers will continue to be a key source market for many destinations.

MORETON BAY REGION'S CURRENT VISITOR PROFILE

What does the typical visitor to Moreton Bay region look like?

- › The largest group of visitors are aged 55+(38%).
- › Have an annual household income between \$0 - \$99,999.
- › Is a day tripper (overnight visitors make up 19% of the market).
- › Enjoy nature-based activities such as visiting the beach and bushwalks through national/ state parks.
- › Spend an average of \$91.70 per day on a day trip, while overnight visitors spend \$123.78 per trip per day.
- › Stay in private accommodation (visiting friends and relatives, their own caravan etc.)



DOMESTIC VISITORS, AS OF JUNE 2022



2,759,000 domestic day trip visitors
| ↓ **20.1%** from previous FY |



780,000 domestic overnight visitors
| ↑ **1.4%** from previous FY |

2,239,000 domestic visitor nights
| ↑ **10.5%** from previous FY |



Average length of stay **2.9** nights
| ↑ **0.3** nights from previous FY |

Visiting for holiday (**48%**)
Visiting friends and relatives (**40%**)
Business (**11%**)



Domestic visitor expenditure reached **\$533 million**
| stable from previous FY |

Capturing **17.9%** of Brisbane's domestic visitor market
| ↓ **8.1%** from previous FY |



Supporting over **5,400** industry jobs within region
| as of FY21 |⁷

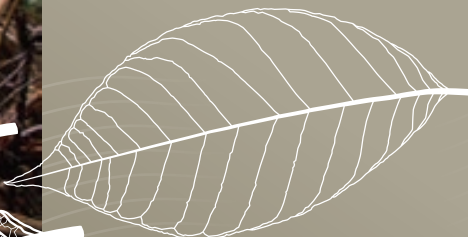


Figure 4 Domestic visitation and expenditure

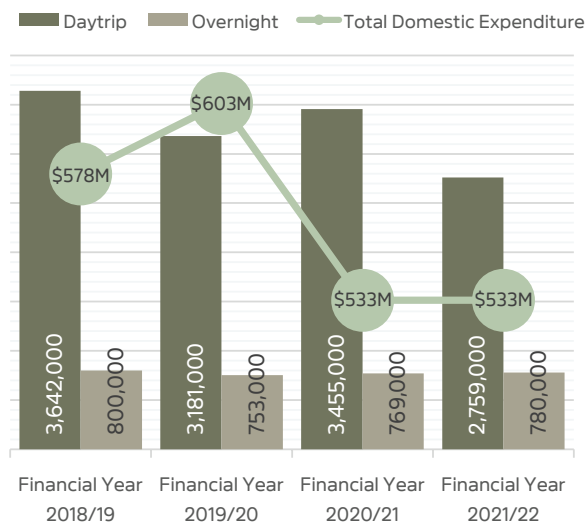


Figure 5 Domestic nights and ALOS

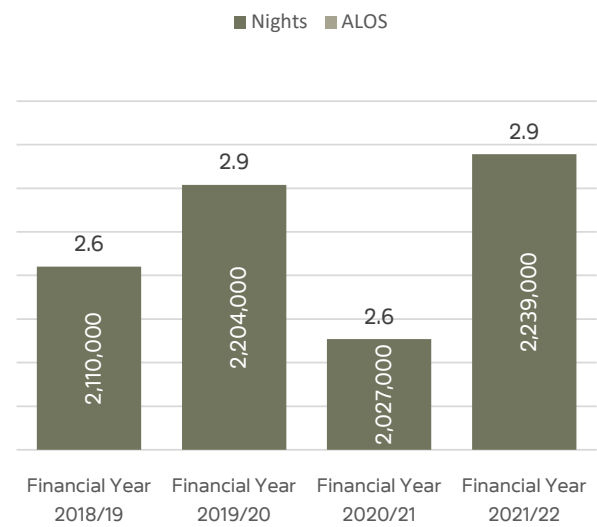
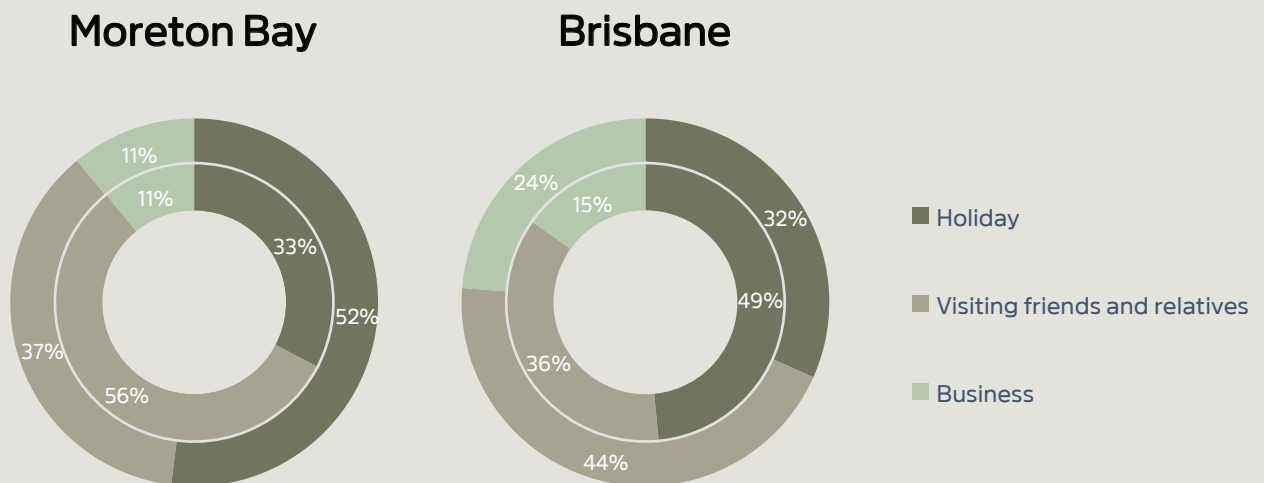
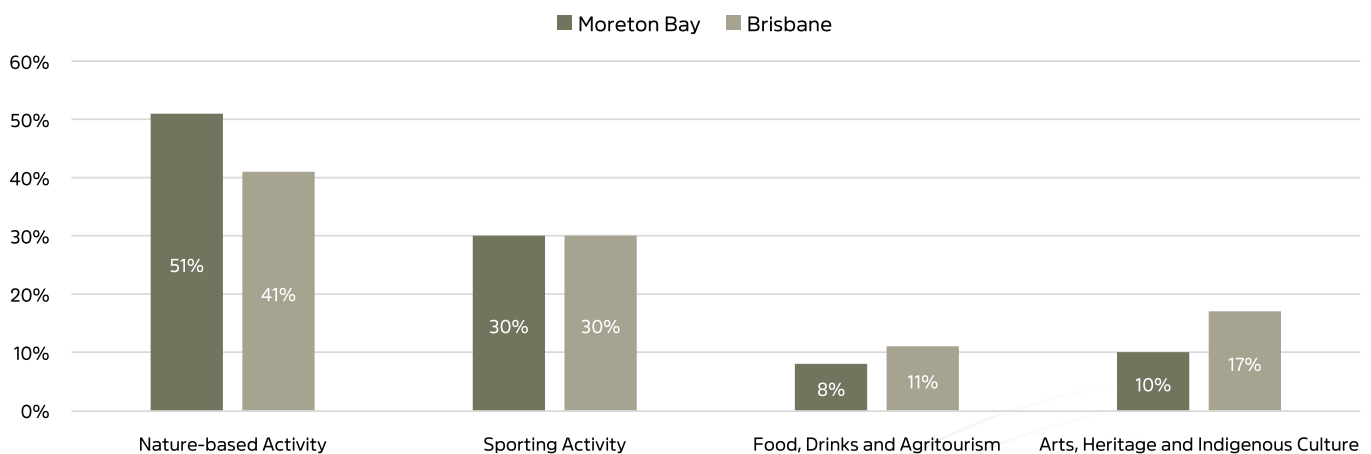


Figure 6 Domestic and overnight visitors reason for trip comparison with Brisbane using 4 year rolling average from 2019/20 to 2021/22 financial year



Comparison between: Outer circle domestic daytrip visitors, inner circle domestic overnight visitors

Figure 9 Total domestic activity preference comparison with Brisbane using 4 year rolling average from 2019/20 to 2021/22 financial year



INTERNATIONAL VISITORS, AS OF JUNE 2020



63,621 international visitors
| ↓ **20.0%** from previous FY |



1,436,495 international visitor nights
| ↓ **21.5%** from previous FY |

Average length of stay **22.6** nights
| ↓ **0.4** nights from previous FY |



Visiting friends and relatives (**63%**)
Visiting for holiday (**30%**)
Other (**7%**)

Capturing 6.0% of Brisbane's domestic visitor market
| ↑ **7.6%** from previous FY |



Number one international market is New Zealand (**40%**)

To summarise, visitation patterns to the region are well established:

- › Strong VFR and holiday markets.
- › The proportion of visitors who travel for business is lower than most comparable regions.
- › Most notably, the region's visitor profile is dominated by day visitors.
- › Average spend per head is relatively low, with the largest segment of visitors drawn from households with an annual income between \$0 - \$99,999.
- › Self-drive visitors dominate the means of travel to Moreton Bay region.
- › The Brisbane region and wider South East Queensland is the region's key source market (87% of all domestic visitors).
- › Interstate markets account for only 4% of all visitors.
- › International visitors form a low proportion of overall visitors – VFR is a key source of visits and attracting visitors to the Brisbane and Sunshine Coast regions to spend a part of their trip in Moreton Bay is an important consideration.

Shifting the dial on these market trends – growing yield/ visitor spend per head will take time, partnership and commitment.



MORETON BAY REGION'S EXPERIENCES & IDENTITY

Products and Experiences

Across the diverse landscape of Moreton Bay region, there is a breadth of products and experiences. However, as identified in the TOP, more than half of the products available are not commissionable tourism experiences. This creates challenges in terms of market visibility. Industry consultation also noted the limited options for wet weather activities and a twilight or night-time economy. Stakeholders have identified further potential from new experiences in community-driven arts, culture and heritage, and agritourism.

The limited range and number of commercial accommodation rooms currently available in the region is seen as a major impediment to continued overnight visitor economy growth.

Brand and Identity

As one of the larger and diverse regions in Queensland, Moreton Bay requires an inspiring and distinct identity, through a refreshed brand strategy and visual identity that will appeal to domestic travellers now, and in the future and drive long term visitation to the region.


Recent research⁵ identified a lack of region understanding by the target audience, with the region often being confused with other destinations that sit outside the Moreton Bay LGA (i.e., Moreton Island, Stradbroke Island, Tangalooma, Manly). Key takeaways include:

- › Lack of regional understanding – the breadth of the region and the range of experiences on offer is difficult to digest and grasp by visitors.
- › The region's name is being misattributed - The current region name is confused with Moreton Bay as a stretch of water. There's a lack of awareness of the vast region encompassed in Moreton Bay LGA. Visitation is heavily shaped by a large VFR market.
- › Despite the diverse nature of the region, distinctive icons or signature experiences are lacking to make the region distinctive compared to surrounding destinations.

The research concern for the lack of affinity from target markets is confronting, however, there is an opportunity to change the current narrative about the Moreton Bay region. It's imperative that Moreton Bay begins to differentiate itself with a distinct look and feel that cuts-through the crowded destination marketing clutter and 'owns' the name "Moreton".

The domestic visitor market is highly competitive, with Moreton Bay being in close proximity to neighbouring destinations that have like natural assets (i.e., a hinterland, pristine waters, white sandy beaches). Hence the need to establish increased awareness through differentiation and intrigue is greater than ever.

The Opportunity



The Moreton Bay region needs to establish itself as a destination of feeling and meaning, rather than tangible assets, and inspire travellers to visit through showcasing the experiences that stir the emotions and allow a feeling of connection to the region's people and the land.

⁵ WMLY&R brand research, 2022



The opportunity can be realised through a refreshed brand strategy and visual identity that will appeal to travellers now and in the future, positioning the region for future economic and community benefits as well as opportunities for the Brisbane 2032 Olympics and Paralympic Games.

Brand positioning for the region is as follows:

Feel the spirit of the Moreton Bay region

*In the Moreton Bay region, the spirit and pride of the locals radiate through every experience you encounter, across every corner of the region. And lucky for you, there's quite a fair few of those!
Every time you visit, you'll gain a newer, deeper, richer experience.*

Given the current rising uncertainties in the local economy, Australian travellers are shifting from overseas travel to local trips. Importantly, the intrigue of an overseas trip needs to be replaced with something equally and locally new and intriguing. Moreton Bay region is one of the most diverse and alluring regions in Queensland. It definitely stands out: often in unexpected, whimsical, and utterly delicious ways.

'That's Deliciously Moreton' encapsulates the feeling and local spirit of the Moreton Bay region but does it in a memorable and visceral way. The refreshed brand position celebrates the beautifully quirky spirit that sets the region and its experiences apart.

The Urban Dictionary defines 'delicious' as anything that "brings joy and pleasure, often used as an alternative to anything good, such as 'awesome' and 'amazing'". Oddly charming, disarming, and quirky, 'That's Deliciously Moreton' seeks to create a circuit breaker in the 'vanilla' destination marketing landscape to communicate the feeling and meaning of the Moreton Bay destination: a destination that is delightful, surprising and welcoming.

An aerial photograph of a beach. The top half of the image shows the ocean with greenish-blue water and white, foamy waves crashing onto the shore. The bottom half shows the golden-brown sand of the beach. Four people are walking on the sand, leaving long shadows. The text 'THAT'S DELICIOUSLY MORETON' is overlaid in large, white, sans-serif capital letters in the upper half of the image.

THAT'S DELICIOUSLY MORETON

Woorim Beach

Moreton Bay
REGION

05 SWOT Summary

STRENGTHS

- › Growing population and infrastructure development within the region.
- › Established, and diverse program of events across the region.
- › Coast to hinterland destinations offer a diverse tourism asset base with a mix of water and land-based experiences.
- › Committed partners – industry, Council and MBRT.
- › High market share of day trip visitors from Brisbane.
- › A community proud of its culture, history and arts.
- › An accessible region – proximity to two international airports.
- › Proximity to a large core visitor market in the Brisbane region.
- › Bayside access.
- › A growing agritourism sector.

WEAKNESSES

- › Limited accommodation range.
- › Limited depth in commissionable experiences.
- › Poor visitor awareness on brand and geographic location.
- › Low experience/activity participation rate from visitors.
- › Low average spend per capita associated with day visitors and a large VFR market.
- › Lacking signature or anchor experiences.

OPPORTUNITIES

- › Build stronger positioning and brand identity.
- › Leveraging the profile generated by Dolphins joining the NRL in 2023.
- › Continued development of accessible and inclusive tourism.
- › Preparation for the Brisbane 2032 Olympic and Paralympic Games.
- › Sustainable-tourism and certification opportunities.
- › Tapping into growth market opportunities including nature/adventure, authentic food and drink, culture/heritage and health & wellness.
- › Authentic culinary and agritourism experiences.
- › Leveraging Bonza's new regional route network from Sunshine Coast airport.
- › Create opportunities for additional visitor expenditure while participating in nature-based activities.
- › Leveraging investment in precincts e.g., Redcliffe foreshore activation, The Mill, North Harbour.
- › Establish the Redcliffe peninsula as a regional gateway to the bay and islands.
- › Capitalising on the likely focus on domestic tourism including drive/touring during 2023/24.
- › Events capacity building, including precincts and spaces which facilitate delivery of efficient events.
- › Arts and culture capacity building. Leveraging current art and heritage trails.
- › Creating spaces that allow flexible work, opportunity for 'bleisure' and work nomads' market.
- › Dispersing visitors around the region from our main access points.
- › First Nation's storytelling and tourism opportunities.
- › Tapping into the business and MICE market.

THREATS

- › Uneven sector and geographic post-COVID-19 visitor recovery.
- › Workforce pressures – lack of personnel in the visitor economy.
- › A number of competitive destinations within short driving distance.
- › Economic uncertainty will shape demand in the short term.
- › Visitor management pressures during peak season for some destinations, including Bribie Island.
- › Extreme weather and climate change risks.
- › Over tourism - losing community license to operate.



06 The Strategy

VISION

As a sister document to the Tourism Opportunity Plan, the DMP shares the vision

"To nurture and drive sustainable economic growth in the visitor economy that contributes fully to quality of life for Moreton Bay communities and businesses."

MISSION

The mission outlines the region's overarching tourism goals. We will:

- › Position Moreton Bay region as a must visit destination, underpinned by a clear brand identity.
- › Generate demand in target markets for Moreton Bay experiences, growing our market share of overnight trips in the Brisbane region.
- › Drive the growth of high quality tourism products and experiences, in line with the strategic direction set out in the TOP.
- › Focus on value alongside volume, building yield from target visitor markets.
- › Position the region to take full advantage, as the four year cycle leading up to the 2032 Olympic and Paralympic Games begins in August 2028.

GROWTH THEMES AND STRATEGIC PRIORITIES

Four strategic themes have been identified as a framework to deliver on the region's tourism vision, with strategic priorities which speak directly to the Towards Tourism 2032 strategy, providing focal areas for action.

Generating Demand

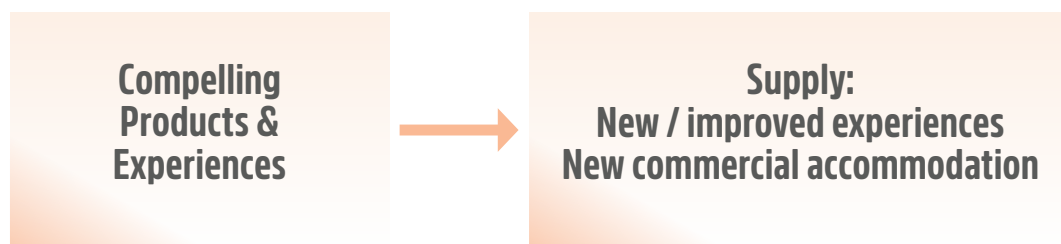


An over-riding priority is to generate demand which drives sustainable visitor growth across domestic and international markets. This means:

- › **Establishing and embedding a refreshed destination brand** with the support of businesses and partners.
- › Generating new demand from target markets, in particular **growing overnight visitor spend** (particularly mid-week and off-peak season), and maintaining our core day visitor market.

- › **Increasing value from visitors**, through growing average per day expenditure.
- › Capitalising on the region's alignment with key growth trends in areas such as nature-based and adventure tourism, culture and the arts and authentic food and drink.
- › **Building business trips** from the current low base (11% of trips), aligning with the intent to attract new commercial accommodation development.
- › Capitalising on the region's large **VFR** market, building local awareness of experience opportunities.
- › International markets are expected to return to normality over the term of the DMP – working closely with regional and state partners. The region will seek to **leverage its accessibility from Brisbane and Sunshine Coast Airports** as a means of growing share of the region's international visits.

COMPELLING PRODUCTS AND EXPERIENCES



Compelling tourism products and experiences are a pre-requisite for destination success – they provide the all-important reasons to visit. Given the region's characteristics, ongoing trends and market demands, priorities include:

- › Continuing to develop the region's program of **signature events**.
- › Working collectively to attract new **commercial accommodation** to the region as identified in the TOP: branded hotels, a destination holiday park and adventure hub lodge in the hinterland.
- › Itineraries and infrastructure that support **drive and touring opportunities** in the region.
- › Working with operators to **build high quality experiences**, leading to strong levels of visitor satisfaction and a growing positive reputation for the region. Tourism & Events Queensland (TEQ) Best of Queensland Experiences is a state-wide program which encourages development in this important area.

GAME CHANGERS



The TOP sets out a range of prioritised opportunities, which individually and collectively can make a game-changing difference to the region. This **new investment** is crucial for the region to make the step-change in creating new demand. Key projects include:

- Project 1:** Hinterland destination holiday park
- Project 2:** Hinterland adventure hub lodge and hinterland glamping
- Project 3:** Wellness facility (with rockpools, food & beverage, and eco-cabins)
- Project 4:** Rail trail facilities and infrastructure
- Project 5:** Major waterfront aquarium
- Project 6:** Ferry service (around/ throughout Moreton Bay)
- Project 7:** Hinterland great walk (with accommodation)
- Project 8:** Food tourism hub

The Brisbane 2032 Olympics and Paralympics Games is a global event that will place all of South East Queensland on the map, requiring strategic positioning to make the most leading up, and post event. Moreton Bay region will be a key stakeholder in the further planning and development to the lead up of the Brisbane 2032 Olympic and Paralympic Games to supercharge the State as a world-class destination. The end of this DMP period will coincide with the start of the four year cycle leading up to the Games – the region needs to be ready for this milestone.

First Nations tourism is growing in importance in domestic and international markets. With the support and leadership of traditional owners, the region is able to successfully integrate First Nations stories as part of the destination brand and establish high quality experiences. This can be a gamechanger for the region by supporting enriching cultural experiences that showcase First Nations tourism experiences, providing economic opportunities for local Traditional Owners, Indigenous communities, Aboriginal and Torres Strait Islanders leaders and businesses.



Agritourism

The region's growing network of agribusiness, food and beverage businesses, and producers, provide a point of difference for Moreton Bay region. The region produces 57% of Queensland's strawberries and 32% of the state's pineapples, as well as prawns, bugs and crabs, making the Moreton Bay hinterland and bay region uniquely positioned to create and grow agritourism experiences. Strong demand from visitors for authentic food and drink experiences and the potential to grow momentum based around the local food story, provides the opportunity for agritourism to be a gamechanger for the region.

Moreton Bay's food offering has continued to evolve and grow as part of the region's visitor experience over the past 5 years:

- The successful development and delivery of Moreton Bay Food + Wine Festival, and Tastes of Moreton Bay Festival, and the appetite from growers, producers, operators, and visitors alike to expand the depth and breadth of the offer, has led to identification of the opportunity to develop and deliver a comprehensive strategy and deliver pathways to grow the agritourism offering in the region.
- The Moreton Bay Regional Economic Development Strategy (REDS) has identified both food and agribusiness, and tourism and major events as two of four key growth industries.
- The Tourism Opportunity Plan (TOP) identifying tourism infrastructure priority projects, with a 'Food Tourism Hub' being identified as a priority project.
- The expansion of the Food & Agribusiness Network (FAN) charter to Moreton Bay, empowering local growers and producers to grow networks, build capability, increase knowledge, and raise their profile.
- The evolution of Australia's first REKO Ring in the Moreton Bay region, initiated through COVID, giving rise to new micro-growers as well as established mature producers, the opportunity to directly connect with the consumer who are hungry for locally sourced and sustainable produce.
- A buy-local focus and push from local government, and an appetite from local industry and consumers to source locally.

CREATING THE CONDITIONS FOR GROWTH



Sustainability is now recognised as an underpinning theme for the sector – national and international climate change obligations will become increasingly important, and consumer demand for sustainable practices and experiences is growing quickly. MBRC in partnership with MBRIT has recently committed to seeking sustainable tourism certification for Moreton Bay region – this program can underpin the region’s approach over the next 5 year period. Considerations will include capacity building with businesses to support climate change, decarbonisation targets, and integrating sustainability into experience delivery.

Building **talent and skills** within the industry is a long term objective, alongside working with industry partners on career pathways. In the short-term, a legacy from COVID-19 is that the industry is facing significant labour shortages. This is a problem being faced Australia-wide and requires a coordinated federal-state-local response. Similarly, innovative solutions will be needed for practical problems – workforce accommodation shortages and transport options for hospitality and tourism staff in more remote areas are issues that are already being faced.

Moreton Bay region’s growing population of young families also provides opportunities to raise awareness of career opportunities in the region’s schools. MBRC’s work with the Forge program is a good example of the type of initiatives which can be introduced, building awareness and creating links with employers.

Regional tourism partners should continue to work closely with QTIC and MBRIT to ensure that tourism businesses are aware of, and are able to access support from the wide-ranging federal and state government workforce development and skills programs in market.



Collaboration is key to the region's ongoing success through productive partnerships. The region benefits from a Council that is committed to tourism as a key sector of the economy, who is working collaboratively with the region's local tourism organisation – MBRIT. The nature of tourism where customer journeys touch on many jurisdictions and all elements of destination infrastructure mean that effective collaboration is required. While not an exhaustive listing, collaboration is required in:

- › From a **marketing** and **experience development** perspective, local, regional, state and federal partners all play important roles (local tourism groups, MBRIT, Brisbane Economic Development Agency, TEQ, Tourism Australia).
- › Working with MBRC on a **whole of council approach** towards destination management – underpinned by an economic development focus, but touching on many functions including planning, asset management, arts and culture, and coastal management.
- › With the importance of **nature and the environment**, Queensland Parks and Wildlife Service will be an important partner.
- › A range of agencies can support **business and infrastructure investment and development** including MBRC, the Queensland Government and Austrade.
- › **Industry training and capacity building** partners include MBRIT, University of Sunshine Coast (UniSC), local TAFEs and colleges, Spinal Life Australia, Queensland Government Department of Employment, Small Business and Training, Food and Agribusiness Network (FAN) and Queensland Tourism Industry Council (QTIC).
- › **First Nations** tourism, driven first and foremost by First Nations peoples, with support available from QTIC's Indigenous Employment Champions Network.
- › **Local tourism businesses** working collaboratively and in partnership with local businesses to create positive economic impact for the community.

Connectivity is a part of great destinations that make it as easy as possible for consumers to enjoy and access their varied experiences. This means:

- › Great **digital connectivity** – access to e-commerce opportunities, distribution, and future opportunities in areas such as blockchain and the metaverse.
- › **Physical and inclusive access** – making the region's destinations accessible to all. Itineraries which give the assurance of the entire journey being accessible, are a key to success.
- › **Strategic access for visitors** – the region's benefits from having access to two international airports.
- › The ability to **disperse visitors** from **key gateways and arteries**, including the Bruce Highway and strategic road network.
- › **Inter-region connectivity** – transport options including walking, cycling and public transport which provide options to connect between experiences and destinations.
- › Effective **wayfinding and communication** which underpins all elements of connectivity.
- › **Innovative visitor servicing** that supports connectivity and adds value for visitors.

07 Targets and KPIs

Market and economic conditions are expected to be volatile throughout the first years of this DMP, making target setting difficult, however, strategic targets are necessary – setting aspirational goals and providing a means of measuring success.

Given the strategic focus for sustainable growth, targets are required in the following areas:



ECONOMIC



QUALITY



AWARENESS, POSITIONING AND REPUTATION



ENVIRONMENTAL



COMMUNITY



PRODUCTS AND EXPERIENCES

Economic

- › A growing number of tourism businesses based in or operating in Moreton Bay region.
- › Workforce: number of employees in tourism versus unfilled vacancies.
- › Growing share of the Brisbane region's overnight trips, in line with growth in the region's commercial accommodation stock.
- › Growing average expenditure per customer in day visitor and domestic overnight markets:
 - Raising day visitor spend per capita by 35%, from \$91.70 (2022 value) to reach the average of \$109 for the Brisbane tourism region.
 - Raising domestic overnight expenditure per day by 35%, from \$123.78 (2022 value) to \$167.10.
- › Increasing the average length of stay of domestic overnight visitors in the region from 2.9 (2022 value) nights to 3.1 nights (the Brisbane tourism region average).
- › Growing the proportion of domestic business visitors to the region from 11% (2022 average value) to 16% by 2028.

Quality

- › Growing Moreton Bay business participation in TEQ's Best of Queensland Experiences (BOQE) program from 27% (2022 value) to a target of 60% by 2028.
- › Growing positive consumer sentiment towards Moreton Bay region tourism experiences on key social media platforms.
- › The region's top 20 visitor experiences will have accessed Transformational Experiences mentoring support via TEQ's ongoing support programs.

Awareness, positioning and reputation

- › Improved awareness and sentiment towards the region, using the benchmarks identified in the brand audit/re-positioning work.

Environmental

- › Moreton Bay region is accredited as a sustainable tourism destination by 2024.
- › Grow the number of businesses participating in recognised sustainable tourism programs to 10 by 2028.
- › Using the carbon footprint for the region identified as part of the certification program to use as a baseline, for monitoring the level of CO2-e per visitor generated in the region, with the aim of reduction by the end of the DMP period in 2028.
- › Incremental improvement on key sustainable tourism certification benchmarking metrics, including water, energy and waste.

Community

- › Using a new community survey to assess community awareness and support for tourism as a benchmark, seek to grow support to 80%+ over the 5 year term of the DMP.

Product and experiences

- › Expand the level of commercial beds in the region from 1,149 in 2022 to 1,900 by 2028 (reflecting the TOP Target of 4 new hotels by 2026).
- › Growing Moreton Bay region business representation on the ATDW distribution platform from 127 businesses (2022 value) to 300.
- › Successfully secure investment in the 8 priority projects identified in the TOP.
- › Increase the capacity of commissionable tourism experiences to attract and host more visitors.







08 Action Plan

ROLES AND RESPONSIBILITIES

Working closely with industry and public sector partners, MBRIT will be the driver of this DMP. Ongoing commitment will be required for execution of the actions through a proactive team, flexible decisions based on evidence, and collaboration.

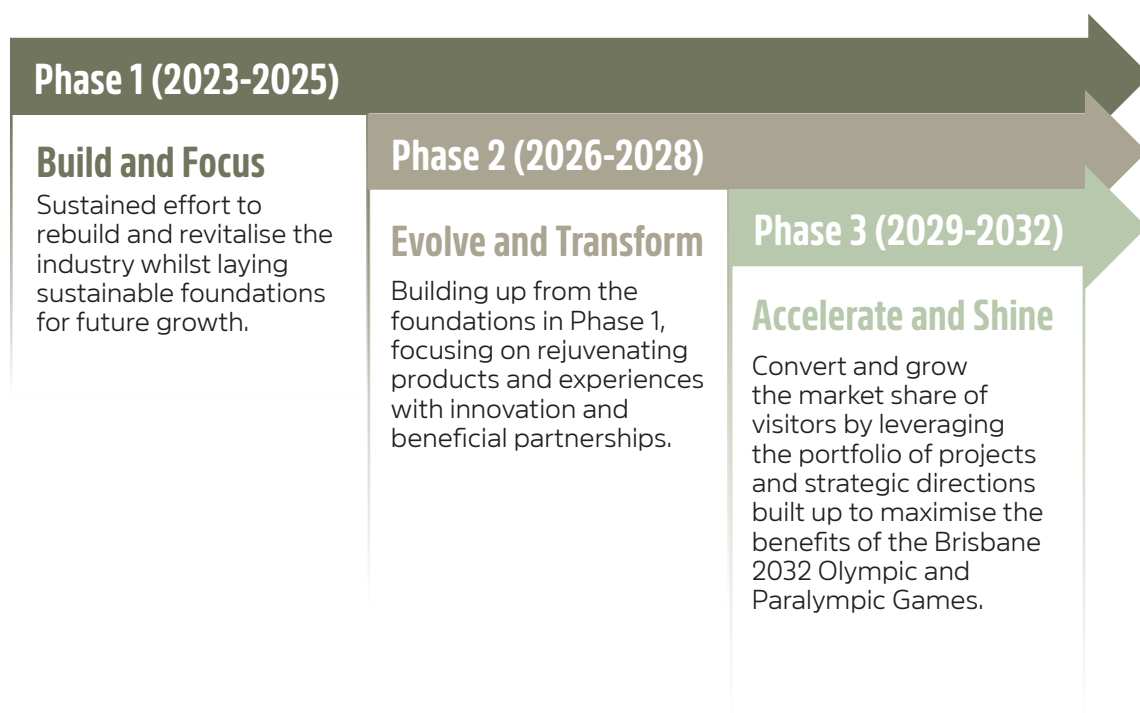
The success of this DMP cannot be achieved alone, it requires collaboration of the tourism industry across local, regional, state and national stakeholders to provide the necessary support to deliver on actions. Table 2 outlines the key stakeholders across regional, state and national levels.

Table 2 Overview of key stakeholders, roles and responsibilities

STAKEHOLDERS	Local and Regional	State	National
	› Moreton Bay Region Industry and Tourism (MBRIT)	› Tourism Events Queensland (TEQ)	› Tourism Australia (TA)
	› Moreton Bay Regional Council (MBRC)	› Department of Tourism, Innovation and Sports (DTIS)	› Austrade
	› Brisbane Economic Development Agency (BEDA)	› Queensland Tourism Industry Council (QTIC)	› Australian Tourism Industry Council (ATIC)
	› Local Tourism Operators	› Queensland Parks and Wildlife Services (QPWS)	› Australian Tourism Data Warehouse (ATDW)
	› Local First Nations Groups and Operators	› The region's Olympic Committee	› Federal Government
	› Other Council Areas	› Other State Government Departments	› Australian Tourism Export Council (ATEC)
	› Other Regional Tourism Operators (RTOs)	› Queensland Hotel Association (QHA)	
	› Food & Agribusiness Network (FAN)	› Department of Employment, Small Business and Training	
	› Local Chambers of Commerce		
	› Moreton Bay Regional Council Olympic Committee		
	› University of Sunshine Coast (UniSC)		

DMP DELIVERY AND ALIGNMENT WITH QUEENSLAND'S STRATEGIC DIRECTIONS

Underpinning the overarching growth themes and strategic priorities, a series of actions have been identified to support delivery of the overall DMP vision. The DMP actions are planned in three phases, mapping alongside the timing identified in the recently published Queensland tourism plan, *Towards Tourism 2032*¹. The majority of DMP actions are aligned with the Build and Focus (2023 – 2025), and Evolve and Transform (2026 – 2028) phases of the Queensland plan:



While Phase 3 of the Queensland plan (Accelerate and Shine (2029 – 2032) extends beyond the term of this DMP, it's actions lead directly towards outcomes that will deliver on accelerated growth the meet the 2032 targets.

ACTIONS: GENERATING DEMAND

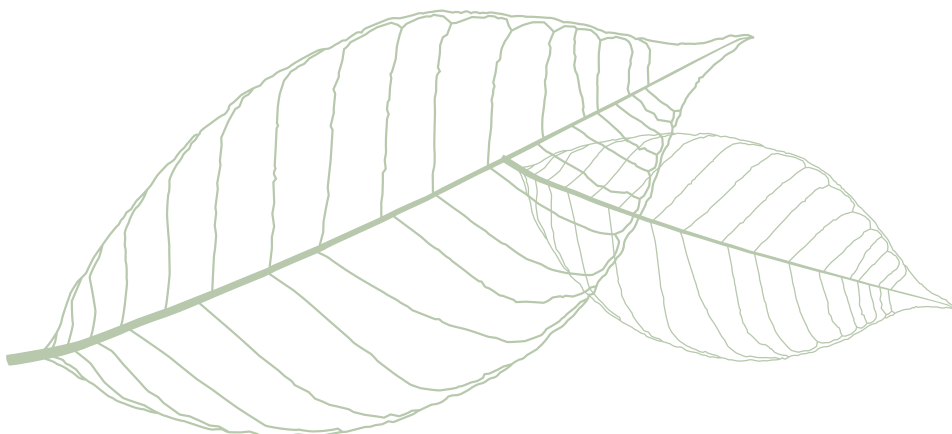
Demand

	ACTION	TARGETS/OUTCOMES	STAKEHOLDERS	TIMELINE
1	Review current visitor brand to ensure it is fit-for-purpose and agile to continue to grow and evolve. Ensure that the re-positioned brand defines a clear market position to target visitors.	Improved consumer awareness and positive sentiment towards the region.	MBRIT , industry	Phase 1
2	Embed branding and encourage take up by Moreton Bay region tourism businesses.	Improved consumer awareness and positive sentiment towards the region.	MBRIT , industry	Phase 1
3	Leverage the profile raising opportunities for the Moreton Bay region, from Dolphins' initial seasons in the NRL.	Contribution to regional awareness raising.	Dolphins , MBRIT , BEDA	Phase 1 Phase 2
4	Support year-round tourism opportunities through messaging and marketing seasonal offerings and itineraries, focusing on opportunities to grow length of stay and expenditure.	Increase visitation, visibility and yield.	MBRIT , local operators	Phase 1
5	Embed sustainability messaging (in line with progress on achieving sustainable destination certification) across internal and external communications to increase awareness and transparency on actions.	Increase awareness of sustainable measures, increase demand of visitors.	MBRIT , MBRC	Phase 1 Phase 2
6	Leverage increased visitor demand for accessible, sustainable, First Nations tourism, and agritourism experiences.	Increased market share of regional day trips and domestic overnight.	MBRIT , local operators	Phase 1 Phase 2
7	Explore opportunities on international marketing campaigns focusing on the New Zealand market, exploring partnerships with New Zealand regional tourism operators.	Increase yield from international visitors converting VFR market to participate in more local experiences.	MBRIT , RTO partners, airports	Phase 2
8	Explore opportunities to leverage Bonza's new regional Australia routes from Sunshine Coast Airport.	Grow intrastate and interstate overnight visitor expenditure.	MBRIT , Sunshine Coast Airport , Bonza	Phase 1
9	Capitalise on strong domestic demand for drive and touring trips, especially in hinterland destinations, via targeted investment in infrastructure and services which builds appeal for touring visitors (i.e., short term parking in appropriate locations, a range of commercial and non-commercial camping options, access to dump points and potable water).	Increased capture of multi-stop and overnight touring trips in the region.	MBRIT , MBRC , local operators	Phase 1
10	Encourage local operators to list on ATDW to build market exposure for Moreton Bay region experiences and leverage the opportunities from the platform.	Grow number of Moreton Bay regional businesses on the platform to 300.	MBRIT , local operators	Phase 1 Phase 2
11	Work with Moreton Bay region tourism businesses to become international-ready, building their capability and capacity, to support preparedness for the 2032 Olympic and Paralympic Games.	Number of international-ready businesses.	MBRIT , local operators, QTIC , TEQ	Phase 1 Phase 2 Phase 3
12	Continue advocating for supporting local operators and the experiences available to residents and communities. Improved product knowledge will support VFR opportunities.	Increase yield across visiting friends and relatives' market.	MBRIT , Moreton Daily , local communities	Phase 1
13	Continue targeted promotion of high profiles events, linking trips to overnight stays where possible. Investigate opportunities for partnerships with AirBnB/sharing accommodation platforms to provide short term capacity for larger events.	Growing overnight visits.	MBRIT , local operators	Phase 1

ACTIONS: COMPELLING PRODUCTS AND EXPERIENCES

Supply

	ACTION	TARGETS/OUTCOMES	STAKEHOLDERS	TIMELINE
14	Support operators to deliver accessible and inclusive tourism products through enhanced knowledge and capability. Development of additional itineraries can help to build additional visits.	A more inclusive tourism industry with more operators able to accommodate persons living with a disability. By 2025, 25% of the region's tourism operators will be audited for accessibility.	MBRIT , MBRC local operators, Spinal Life	Phase 1 Phase 2
15	Take a collective Team Moreton Bay approach to delivering the 8 priority investment opportunities and need for new commercial accommodation identified in the TOP.	Expanded range of tourism products and experiences	MBRC , MBRIT, prospective investors	Phase 1 Phase 2
16	Work with Moreton Bay region tourism businesses, TEQ and BEDA to encourage investment in new and improved transformative experiences.	Increase in Moreton Bay region tourism businesses accessing transformative experience.	MBRIT , BEDA, TEQ, local operators	Phase 1 Phase 2
17	Support and nurture the ongoing activation of a creative arts trail in Samford and hinterlands to encourage the arts and culture scene and provide economic benefit to the area.	Development and growth of product offerings to create transformational experiences with enhanced yield.	MBRC , MBRIT, local operators, Arts Queensland	Phase 2
18	Via Moreton Bay Regional Council's 'Cultivate the Arts' program, continue to work with performers and venues to grow a distinctive music culture – a strong program of local music alongside events and commercial venues can start to build a compelling proposition.	Grow range of musical and arts culture with locally led events.	MBRC , Music community, QMF, venues, MBRIT, Arts Queensland	Phase 2
19	Explore opportunities to establish an increased range of commissionable experience that target the nature-based tourism market segment.	Increased range of experience offerings.	MBRIT , MBRC QPWS, local operators	Phase 1
20	Support operators to engage with the Best of Queensland Experience Development to improve quality and capacity of experiences. This will be supported through the Best of Brisbane Region Experiences Support Program or other similar related capability building opportunities.	Grow Moreton Bay businesses with Best of Queensland status from 27% to 60%.	MBRIT , BEDA, TEQ	Phase 1
21	Support operators to create and deliver experiences that 'transform,' by leveraging Queensland's Transformational Experiences program.	Increase quality of experiences offered.	MBRIT , TEQ, BEDA, local operators	Phase 1 Phase 2



ACTIONS: GAME CHANGERS

Investment and Funding

ACTION	TARGETS/OUTCOMES	STAKEHOLDERS	TIMELINE
22 Support the ongoing development of new precincts located at the Mill Moreton Bay (Petrie), Scarborough and North Harbour through positive advocacy, identifying opportunities for tourism activations.	New business operators and investors within region, increased visitor growth.	MBRIT, MBRC, precinct managers	Phase 2
23 Work collaboratively as Team Moreton Bay to promote the region's tourism investment opportunities, leveraging Council's investment incentive program, strong market fundamentals, available data, and the commitment of partners.	Attracting new investment.	MBRC, MBRIT	Phase 1 Phase 2
24 Investigate opportunities to establish Scarborough as the gateway to northern Moreton Bay and islands, leveraging opportunities identified in the Tourism Opportunity Plan. Volume of visitor movements can form the basis for development of a cluster of supporting visitor experiences at the gateway i.e., food and beverage, entertainment etc.	Attracting new investment.	Dolphins, MBRIT, BEDA	Phase 1 Phase 2
25 Identify and promote funding opportunities to industry.	Increase industry's visibility of alternate funding sources, and enable their successful attraction of funds.	MBRIT	Phase 1

Brisbane 2032 Olympic and Paralympic Games

26 Positioning of Moreton Bay region as an integral host region for the Brisbane 2032 Olympic and Paralympic Games. The initial focus will be on advocacy and contributing to legacy planning in the initial phase.	Increased brand awareness.	MBRC, MBRIT, regional Olympics partners	Phase 1 Phase 2
27 Work with tourism partners and industry, to be 'Games-ready' by the start of the 4-year cycle leading up the Brisbane 2032 Olympic and Paralympic Games. 'Games ready' to include increased number of operators that are accessible and inclusive, and ensuring a high customer service offering is provided.	Awareness raising of the destination. Industry capacity and capability building such as BOQE and Transformational Experiences.	MBRIT, MBRC, BEDA, TEQ	Phase 3

First Nations

	ACTION	TARGETS/OUTCOMES	STAKEHOLDERS	TIMELINE
28	Investigate opportunities with event operators and venues to imbed First Nations people, business operators and storytelling into events delivered.	First Nations content incorporated into events, where appropriate.	MBRIT , MBRC, First Nations Groups, event operators	Phase 1
29	Work with First Nations representatives to support development of new tourism experiences.	Investment in new tourism experiences.	MBRIT , MBRC, First Nations Groups	Phase 1
30	Investigate opportunities to establish Scarborough as the gateway to northern Moreton Bay and islands, leveraging opportunities identified in the Tourism Opportunity Plan. Volume of visitor movements can form the basis for development of a cluster of supporting visitor experiences at the gateway i.e., food and beverage, entertainment etc.	Delivery of cultural awareness training that encourages local business participation and learnings in First Nation product.	MBRIT , MBRC, First Nations Groups	Phase 1
31	Increase the use of First Nations languages across aspects of cultural tourism and wayfinding / signage where appropriate, such as Council-owned facilities.	Integrating local First Nations language in community increasing cultural awareness.	MBRC , MBRIT , First Nations Groups	Phase 2
32	Investigate opportunities to support implementation of existing commitments to recognise First Nations communities, in particular: a) Moreton Bay Regional Council's Reconciliation Action Plan, and b) the 'Pledge for Procurement' identified in QTIC's First Nations Tourism Plan (non-Indigenous tourism businesses are encouraged to advocate for increased opportunities for First Nations businesses). ⁶	Increased business opportunities for First Nations peoples.	MBRC , MBRIT , First Nations Groups	Phase 2

Agritourism

33	Work with FAN, growers, and producers to identify a cluster of agribusinesses which have greatest potential for development as agritourism experiences. Clusters of 'signature' experiences can form the basis of new itinerary options for visitors.	Development of a cluster of signature agritourism experiences.	MBRIT , FAN , MBRC, local operators	Phase 1
34	Curate opportunities to profile local produce through hospitality providers and tourism operators.	Increase visibility of Moreton Bay's food providence.	MBRIT , FAN , MBRC, local operators	Phase 1
35	Work with FAN to develop a shared value proposition and provenance statement that can be tailored by business type, including visitor-oriented businesses.	Development and application of shared value proposition.	FAN , MBRIT , MBRC, local operators	Phase 1
36	Build on existing partnership working between MBRIT and FAN, to grow mutual benefits between the agribusiness and tourism sectors, and establish a strong economic case for continued investment.	Integrating local First Nations language in community increasing cultural awareness.	MBRIT , FAN	Phase 1 Phase 2
37	Work with FAN and agribusinesses to develop a range of marketing collateral aligned with the shared value proposition.	Increase visibility of Moreton Bay's food providence.	MBRIT , FAN , MBRC, local operators	Phase 1
38	With tourism and agri-business industry partners, advocate for red-tape reduction that supports delivery of new and improved agritourism experiences.	Increase in new or refreshed agritourism opportunities.	MBRIT , FAN , industry, MBRC, Queensland Government	Phase 1

⁶ Pledge for Procurement', QTIC's First Nations Tourism Plan: Embedding First Nations businesses in tourism supply chains to provide goods and services; Creating genuine employment opportunities for First Nations peoples; Raising awareness about black cladding (the practice of a non-Indigenous business entity or individual taking unfair advantage of an Indigenous business entity or individual for the purpose of gaining access to otherwise inaccessible Indigenous procurement policies or contracts) in the tourism industry and promoting genuine working relationships on an equal footing.

ACTIONS: CREATING THE CONDITIONS FOR GROWTH

Sustainability

ACTION		TARGETS/OUTCOMES	STAKEHOLDERS	TIMELINE
39	Seek sustainable tourism destination certification for Moreton Bay region.	Destination certification achieved by June 2024.	MBRC , MBRIT	Phase 1
40	Investigate opportunities to support businesses to start their sustainability journeys. Opportunities include capacity building, provision of tools to help measure impact, and support to pursue certification.	Numbers of businesses with sustainable tourism credentials.	MBRIT , MBRC , local operators	Phase 1 Phase 2
41	Work with QPWS to identify opportunities for development of appropriate forms of ecotourism in the region's national parks.	Sustainable growth and management of visitors to National / State Parks.	MBRIT , MBRC, QPWS	Phase 1
42	Profile businesses that are delivering and integrating sustainable practices.	Increase awareness of Moreton Bay's business that have sustainable credentials.	MBRIT , BEDA, TEQ, industry	Phase 1

Talent and Skills

43	Continue to work with schools via Council's 'My Future in Moreton Bay', a Virtual Career Experience Program to encourage career pathways within the industry and region.	Increase in local workforce with tourism capability and valued skills.	MBRC , MBRIT, local secondary education providers	Phase 1
44	Work in partnership with QTIC to build awareness and access to workforce development programs for the region's tourism businesses.	Business participation in workforce development and skills programs	MBRIT , QTIC , learning institutions	Phase 1
45	Work with industry to identify innovative opportunities to address short-term workforce gaps and challenges, including staff-accommodation, profiling of opportunities etc.	Vacancy numbers reduced.	MBRIT , local industry, QTIC, MBRC	Phase 1

Collaboration

46	Build confidence and collaboration amongst local sector through industry development events and initiatives.	Support collaborations and increase industry capability.	MBRIT	Phase 1
47	Support and foster a Team Moreton Bay environment across whole of industry by proactively engaging all industry leaders and associations (i.e., Chambers).	Collaborative and connected local business sector with the tourism sector working in partnership.	MBRIT , MBRC	Phase 1

Connectivity

	ACTION	TARGETS/OUTCOMES	STAKEHOLDERS	TIMELINE
48	Work with Sunshine Coast Airport and Bonza to leverage new regional flight network opportunities.	Improved airway connectivity to the region.	MBRIT , Bonza, Sunshine Coast Airport,	Phase 1
49	Support businesses to further develop digital skills, accessing regional and local capacity building support.	Skills development.	MBRIT , QTIC, MBRC, Innovate Moreton Bay, industry	Phase 1
50	In the context of being Games-ready in 2032, continue to advocate for the enhancement of the public transport network in between Brisbane, Sunshine Coast and Moreton Bay region, including increased frequency, areas of service, and accessibility of stations and surrounds.	Increase accessibility and connectivity across the region.	MBRIT , MBRC, First Nations Groups	Phase 3
51	Implement an innovative and integrated program of visitor servicing across the VIC network and other forms of communication and wayfinding, to support visitor dispersal and delivery of high quality experiences.	Improved visitor satisfaction.	MBRIT , MBRC	Phase 1

Australian Tourism Data Warehouse – ATDW // Brisbane Economic Development Agency – BEDA // Food and Agribusiness Network – FAN // Moreton Bay Regional Council – MBRC // Moreton Bay Region Industry & Tourism – MBRIT // Queensland Music Festival – QMF // Queensland Parks and Wildlife Services – QPWS // Queensland Tourism Industry Council – QTIC // Regional Tourism Organisation – RTO // Tourism and Events Queensland – TEQ // Visitor Information Centre – VIC //

Note on Stakeholders:

- In bold: represents stakeholders that are leading or delivering action.
- Un-bolded: represents stakeholders whose partnership and/ or collaboration is essential for the successful delivery of action.

A stylized, light-colored map of the Moreton Bay region is overlaid on a solid olive-green background. The map shows the coastline of Moreton Bay and the surrounding land, with internal boundaries representing local government areas. The text 'Moreton Bay' is centered in a large, white, sans-serif font, with 'REGION' in a smaller, white, sans-serif font directly below it.

Moreton Bay

REGION

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