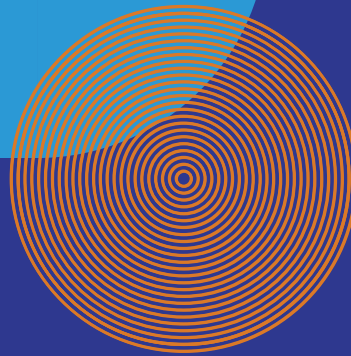
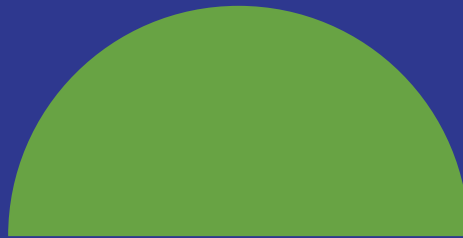
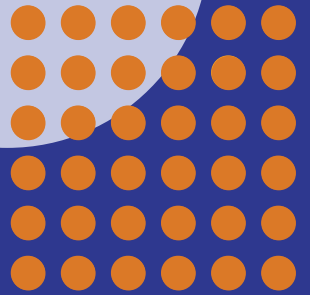
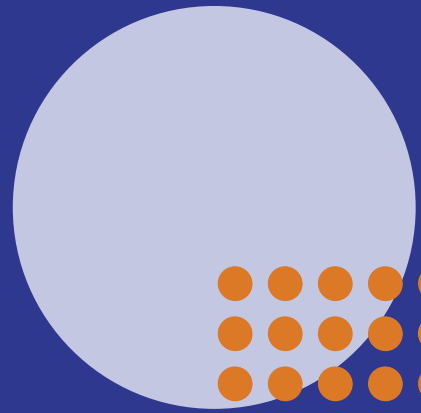


Moreton Bay Region

2022-2027 —

Tourism Opportunity Plan



Acknowledgement of Country

Moreton Bay Regional Council respectfully acknowledges the Traditional Country across our region. We also acknowledge and pay our respects to the Kabi Kabi, Jinibara and Turrbal Traditional Custodians and their elders past, present and emerging. We acknowledge the important role that Aboriginal and Torres Strait Islander people continue to play within the Moreton Bay community.

Acknowledgement of contribution

Council thanks all who have contributed to The Tourism Opportunity Plan (TOP). This plan has been developed using extensive insights provided by a range of specialist experts and through engagement with key stakeholder groups.

The consultation process included background research projects along with direct liaison with business owners, regional organisations, Moreton Bay Regional Council employees and MBRIT (Moreton Bay Region Industry Tourism). The TOP also draws on Moreton Bay Regional Council's 2020-2041 Regional Economic Development Strategy as well as other key Council plans and policies.

In preparation for the plan, a 2021 tourism infrastructure opportunity survey generated a total of 115 responses from the community and industry. The surveys sought feedback on the issues that are hindering the development of Moreton Bay's visitor economy, alongside opportunities for investment and new tourism products to

assist in generating future sustainable growth. Council thanks all contributors and stakeholders involved in this plan for their participation in the preparation of the following studies:

SPINAL LIFE AUSTRALIA: Moreton Bay Region Accessible Tourism Review October 2020

TOURISM AND HOSPITALITY SERVICES (THSA): Short-term Commercial Accommodation Demand Study for the Moreton Bay Region October 2021

STAFFORD STRATEGY: Moreton Bay Regional Tourism Infrastructure Priority Project Plan November 2021

FUTURUM PARTNERS: Tourism, Sport and Major Events Industry Advancement Strategy Background Research Paper, November 2021

EARTHCHECK: Review of Accredited Visitor Information Centres in the Moreton Bay Region, January 2022

Glossary of terms

EPBC:	Environment Protection and Biodiversity Conservation Act 1999
F&B:	Food and Beverage
LTO:	Local Tourism Organisation
MICE:	Meetings, Incentives, Conferences and Events
QPWS:	Queensland Parks and Wildlife Service
RTOs:	Regional Tourism Organisations
TEQ:	Tourism and Events Queensland
STOs:	State Tourism Organisation

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1 Mayoral 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.

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.

The COVID-19 pandemic had a severe impact on businesses throughout the visitor economy, however the sector has demonstrated its resilience, with visitation rebounding strongly to 4.28 million visitors in the year ending September 2021.

As part of COVID recovery and long-term planning to grow the value of the visitor economy, our Council has commenced a suite of initiatives designed to rejuvenate the sector and attract more private sector operators and investment. This Tourism Opportunity Plan 2022-27 sets out our framework for facilitating sustainable growth.

The visitor economy vision for the Moreton Bay Region will be delivered through six growth themes:

1. Striving for tourism value over volume
2. Safeguarding against over-tourism
3. Creating an accessible and welcoming environment
4. Encouraging visitor dispersal
5. Investment (or reinvestment) in an improved depth and range of experiences
6. Collective action for #TeamMoretonBay to achieve our potential



These growth themes will be brought to life by a series of catalytic investment opportunities and projects. While we will focus on securing new accommodation, including internationally branded hotels, and seek out the development of new experiences, our Tourism Opportunity Plan will also importantly focus on better supporting the existing 'reasons to visit' including the 1,000 plus existing tourism operators across Moreton Bay.

This plan sets out our intent up to 2027, however, we also need to take a longer-term perspective. With Brisbane securing the 2032 Olympic and Paralympic Games, and Moreton Bay securing an indoor Olympic Stadium and event, now is the time to ensure our region gets 'games ready'.

In early 2021, our Council adopted the Regional Economic Development Strategy (REDS) to set forward a Bigger, Bolder and Brighter future towards 2041. This Tourism Opportunity Plan 2022-2027 takes that Strategy to the next level by identifying the tourism opportunities and challenges confronting us and how, by working as #TeamMoretonBay, we can inspire locals and travellers to explore more of Moreton Bay and create more value and better connections and ensure that we are 'games ready' for 2032 and beyond.

Peter Flannery
Mayor, Moreton Bay Regional Council

2

Executive summary

Great tourism destinations thrive on great experiences – the all-important ‘reasons to visit.’

Moreton Bay visitor economy vision

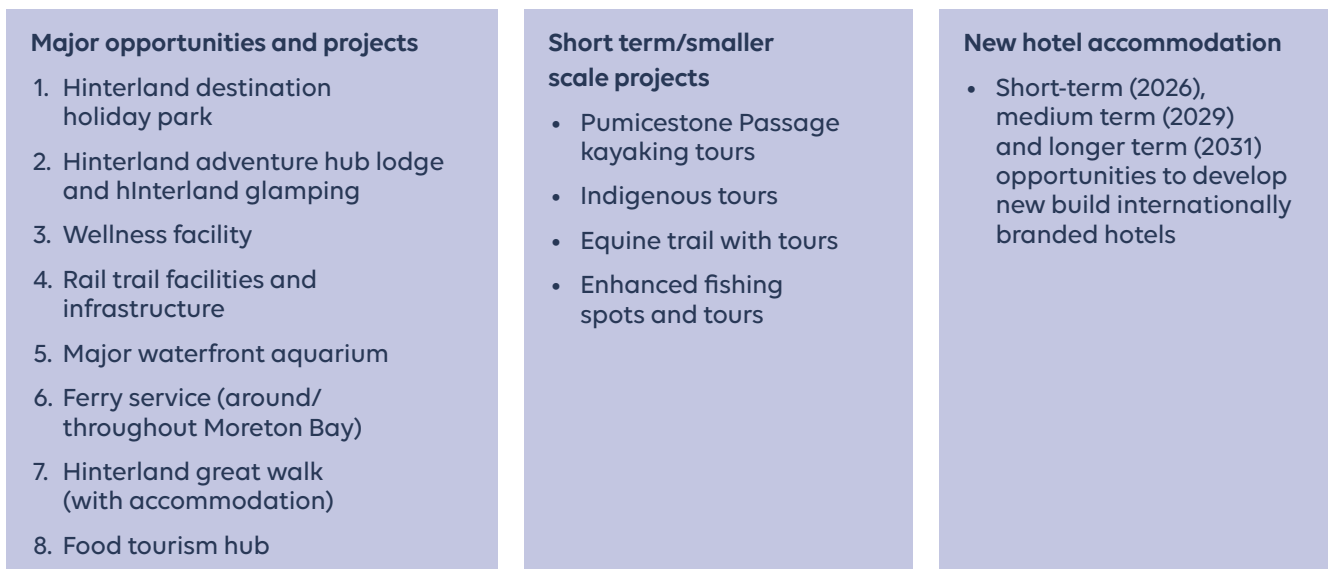
To nurture and drive sustainable economic growth in the visitor economy that contributes fully to quality of life for Moreton Bay communities and businesses.



Growth themes



Investment projects





Building from a position of strength

Moreton Bay Region is, by population, one of the fastest growing and largest regions in Australia (ABS, 2020). Over the past two decades, the region's enviable and diverse lifestyle and ability to still offer all the capital city conveniences and CBD proximity, have been key drivers of growth, as both a residential location of choice and a popular visitor destination.

Driven by domestic markets, visitation to Moreton Bay Region grew steadily between 2011 and 2020 – an aggregate growth of 57% *(an additional 1.6m visitors).

Due to the impacts of COVID-19 restrictions, the region experienced a slight decline in visitor numbers during 2020, though this was short-lived. In 2021, visitation rebounded strongly, with 4.28 million visitors in the year ending September 2021.

Over the last decade, Moreton Bay has established itself as a leisure events destination, with annual major events such as the Moreton Bay Food & Wine Festival, Tastes of Moreton Bay, KiteFest, Woodford Folk Festival and the Abbey Medieval Festivals attracting year-on-year increases in visitors.

Award-winning venues such as Eatons Hill Hotel and Sandstone Point Hotel also have a well-established and highly attended year-round calendar of food festivals, family entertainment events and music concerts that attract and retain visitors.

The opportunity

Despite the existing scale of tourism throughout the region, Moreton Bay Region has unfulfilled potential.

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 under-representing itself by up to \$500 million in lost value from the tourism economy each year.

In straightforward terms, the region needs a greater depth of commercial and commissionable products and experiences that will incentivise visits, persuade visitors to stay longer, and support growth in yield and per capita spend per visit by day and overnight visitors.

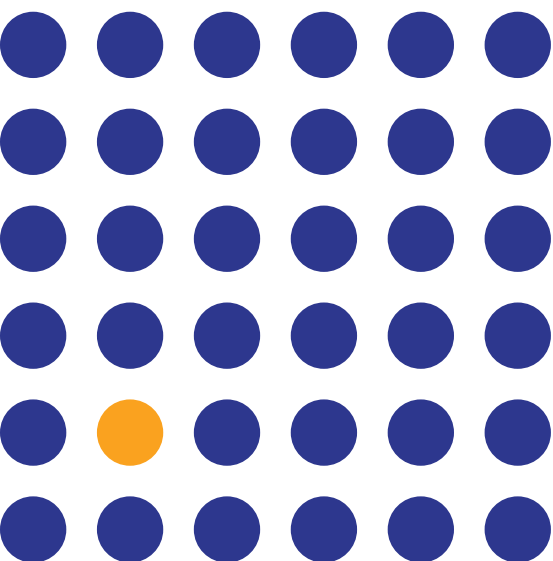
The proximity and excellent accessibility of Moreton Bay to the Brisbane CBD and Brisbane International Airport also provides clear opportunities for the region to expand its footprint in the Meetings Incentives Conventions and Exhibitions (MICE) market and to better tap into international visitors.

Visitors who inject the highest level of spend in their destinations of choice are seeking world-class nature, wildlife, aquatic and coastal experiences. The region possesses all these attributes but is lacking critical infrastructure, with investigations confirming:

1. 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. With additional opportunities for two luxury boutique properties (one in the Hinterland and one on Bribie Island) as well as other family and group-oriented accommodation close to sporting and entertainment venues.

2. The lack of visitor accommodation (of quality and scale) is the single biggest factor preventing the region from maximising its sports tourism potential, despite Moreton Bay Regional Council's significant capital investment in sports infrastructure over the last five years (possibly more than any other regional council in Australia).
3. An increase in commissionable tourism products such as privately developed and funded attractions, all-weather experiences and hinterland-based product and experiences will help grow visitor demand and generate higher levels of visitor spend.
4. Up to 67 potential new or expanded tourism opportunities (requiring a total of \$200 million in public and private investments) have been identified, that would better leverage the region's strong mix of nature-based tourism opportunities and recreational facilities and support thousands of existing and new jobs and businesses. This report has prioritised the top eight (8) for next-stage development.

This TOP is designed to chart a new path for Moreton Bay tourism, prioritise new investment and to be in a position to take advantage of the world's eyes being on Brisbane and South East Queensland in 2032.



Our framework for action

The visitor economy vision for sustainable growth will be delivered through six growth themes:

1. Striving for tourism value over volume

This Tourism Opportunity Plan (TOP) outlines that while the day-tripper market is an important part of the visitor economy, we need to grow yield in that market and achieve a more even balance between overnight and day trippers to derive greater economic benefit.

2. Safeguarding against over-tourism

Attracting the type and scale of visitation that aligns with Moreton Bay community aspirations and environmental capacity is essential. To safeguard against overtourism, congestion management, careful planning, as well as product diversification to support geographical and time-based dispersal are paramount.

3. Creating an accessible and welcoming environment

Responsible tourism growth that delivers maximum social and economic benefits for the Moreton Bay Regional community must inherently be accessible. With 5.6% of people living in the Moreton Bay Region reporting some degree of activity restriction, an accessible tourism industry will ensure that diverse quality lifestyle experiences that leverage the assets of the region are open to and benefit all.

Accessible tourism will equally support local jobs, with an estimated \$8 billion annual worth in Australia, it makes sound economic sense for the region.

4. Encouraging visitor dispersal

Moreton Bay Region, with its geographic spread of accommodation and visitor experiences already enjoys a sound level of geographical dispersal of tourism across the region.

The current dispersal pattern, however, is still an important consideration for responsible tourism growth for the region. While Moreton Bay does not face the typical challenge of drawing visitors from the coastal strip to the hinterland, it does still have several significant tourism hotspots. Pressure on these tourism hot spots could be eased and the benefits of tourism will be spread more widely through enhanced dispersal patterns.

The starting point in the region to influence dispersal patterns is the development and promotion of tourism offerings in many small destinations with low visitation levels that sit between or adjacent to the coastal and hinterland tourism hot spots in the region.

5. Investment (or reinvestment) in an improved depth and range of experiences

Great visitor destinations are often characterised by having a cluster of high-quality and authentic experiences. Investment in existing or new experiences is a key enabler if the region is to provide the depth of experiences that incentivises trips and encourages visitors to choose the Moreton Bay Region. Depth of experience options is also a key determinant to incentivising repeat visits.

This plan recognises the need for Moreton Bay to expand its 'reasons to visit' and grow the depth of its product and experience mix.

There is great potential for the region to connect with new markets - clearly articulating where Moreton Bay is and what it offers to visitors, better leveraging the fact that one in seven Australians live in South East Queensland and taking advantage of growing domestic and international target markets.

6. Collective action for #TeamMoretonBay to achieve our potential

Implementation of the Tourism Opportunity Plan (TOP) will sit within the new delivery framework established for the Regional Economic Development Strategy 2020-2041. Under this framework, the collective strength of key stakeholders will be unified and harnessed.

The unique advantages of the region should be clear to our visitors and residents so that we all know exactly what we want to be known for; as well as what we can do and say to create a strategically deliberate set of perceptions and experiences that define our identity.

To deliver this ambition, the TOP will commit to increased collaboration with industry and stakeholders in prioritising experience developments, improving the quality of visitor experiences and importantly destination marketing owned across Moreton Bay.

Priority projects

These growth themes will be brought to life by a series of catalytic investment opportunities and projects.

Key major investment projects identified are:

1. Hinterland Destination Holiday Park
2. Hinterland Adventure Hub Lodge and Hinterland Glamping
3. Wellness Facility
4. Rail Trail Facilities and Infrastructure
5. Major Waterfront Aquarium
6. Ferry Service (around/throughout Moreton Bay)
7. Hinterland Great Walk (with accommodation)
8. Food Tourism Hub

Short-term/ smaller-scale projects identified include:

1. Pumicestone Passage Kayaking Tours
2. Indigenous Tours
3. Equine Trail with Tours
4. Enhanced Fishing spots and Tours

Accommodation and hotel development opportunities:

- Short-term (2026), medium-term (2029) and longer-term (2031) opportunities to develop new build internationally branded hotels

The Tourism Opportunity Plan (TOP) provides a strategic growth framework for the visitor economy in the Moreton Bay region, however, the plan does not purport to canvas all possible investment opportunities for the region or select opportunities based on geographic areas. Projects and opportunities have been prioritised to match available resourcing.

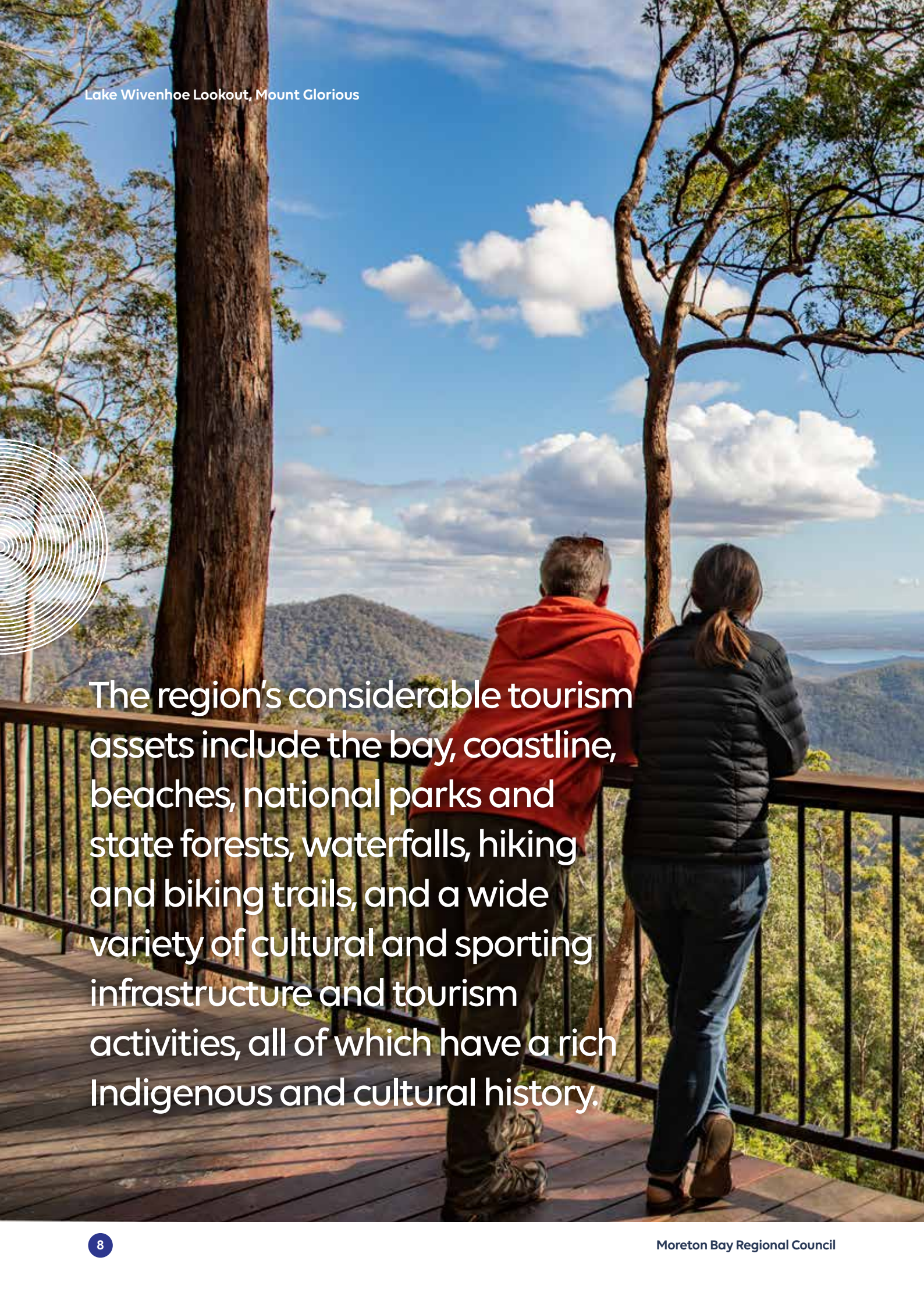
Successful implementation of the TOP will deliver:

- Improved perceptions and awareness of Moreton Bay Region as a tourism destination in key target markets
- Enhanced positive visitor experiences
- Attraction of new investment
- Uplift in economic value

The TOP outlines a range of actions, many of which have already commenced as part of the investigations in preparing this plan, supporting the Moreton Bay tourism sector and better preparing the region to be 'games ready' for 2032.

The next steps in implementing the TOP include further investigations into high-level costings and demand forecasts for the identified opportunities that can be used to facilitate and encourage new private sector investment or support future detailed analysis and business case development where government funding is required.

Aerial shot of Redcliffe Jetty



The region's considerable tourism assets include the bay, coastline, beaches, national parks and state forests, waterfalls, hiking and biking trails, and a wide variety of cultural and sporting infrastructure and tourism activities, all of which have a rich Indigenous and cultural history.

3 Situation analysis



This section of the plan provides a review of Moreton Bay's current status as a destination – its visitor markets, product and experience mix, economic drivers and market fundamentals that make it an attractive place to visit and invest.

3.1 Moreton Bay – a growth region

Moreton Bay Region is, by population, one of the fastest growing and largest regions in Australia (ABS, 2020). It is located between 20 km and 44 km north of the Brisbane CBD and occupies a large and diverse area between the Sunshine Coast in the north and Brisbane City to the south.

Over the past two decades, the region's enviable and diverse lifestyle and ability to still offer all the capital city conveniences and CBD proximity, have been key drivers of growth as both a residential location of choice and a popular visitor destination.

The region has a strong and connected community that enjoys the benefits of some of South East Queensland's most pristine environmental areas, vibrant entertainment options and thriving cultural and community hubs.

The appeal of the region has led to an average population growth of 2.8% per annum over the last decade and year-on-year increases in visitor numbers over the period 2010 to 2019. Growth in Moreton Bay Region is expected to continue for the next two decades, with a population projection of 700,000 by 2041.

To maintain the current lifestyle standards of the region, this growth will be complemented by a transformation of the Moreton Bay economy into a Bigger, Bolder and Brighter economic powerhouse over the next 20 years.

Tourism, sport, and major events; along with advanced manufacturing; food and agribusiness; and knowledge, innovation and entrepreneurship will deliver business and job growth in the region for generations to come.

3.2 Current visitor markets

Driven by domestic markets, visitation to Moreton Bay Region grew steadily between 2011 and 2020 – an aggregate growth of 57% *(an additional 1.6m visitors).

Due to the impacts of COVID-19 restrictions, the region experienced a slight decline in visitor numbers during 2020, though this was short-lived. In 2021, visitation rebounded strongly, with 4.28 million visitors in the year ending September 2021.

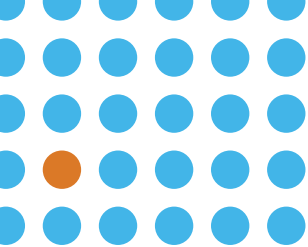
Visitor nights are also expected to increase from the previous peak of 4.47 million in 2019 to 5.25 million in 2031, which will result in an estimated 640,000 additional visitor nights (THSA, 2021).

The focus on domestic markets has positioned the region well for faster recovery when compared with other destinations (and other Australian capital cities) that have been more reliant on international visitor markets.

3.2.1 Balance between day and overnight market segments

Of the 4.3 million visitors now attracted to Moreton Bay Region each year, the majority (3.4 million) are day trippers.

Overall visitor market growth has been fuelled by the day visitor segment. In the year ending September 2021, the region experienced a 13.4% increase in day visitors and a 31% decrease in visitor nights.



While the domestic day trip market has been an important part of the visitor economy, it has a low average visitor spend of \$87 per trip, compared with overnight visitor spend of \$313 per trip in the region.

The impact of this difference is important when visitor movements in and out of the region are taken into consideration. With a visitor spend of circa \$750 million in 2019, the overall average spend by visitors was \$149.48 per visitor.

At a simplistic level, a total annual visitor spend of \$750 million requires an average of 47,200+ movements in and out of the region each day if all visitors are day visitors. Whereas the same economic input can be achieved through an average of 13,130 daily visitor movements in and out of the region if the average visitor stay is three nights.

As domestic trips tend to be more concentrated on weekends, with spikes in demand around long weekends and school holiday periods, visitation is also not evenly spread across the year. This results in an even higher difference between the average daily visitor movements in and out of the region, between day visitors and overnight visitors and impacts on locals and local infrastructure.

For this reason, a more even balance is required between overnight and day trippers to derive greater economic benefit. This will require the attraction of an increased number of long-distance domestic visitors.

Additionally, as demand from international visitors is spread more evenly, they play an important role in supporting businesses during non-peak periods. Hence the region must also grow the size of its international visitor market.

3.2.2 Key source markets

During the year to September 2021, the source markets for both day and overnight visitation were predominantly Brisbane (70%) and Sunshine Coast (13%).

3.2.3 Trip motivations

The primary reason visitors were attracted to the region pre-pandemic was to holiday and visit friends and relatives, representing 47% and 39% respectively of total visitation¹. While business visitation accounted for only 7% of total motivation to travel to the Moreton Bay Region.

Since the pandemic, the distribution of purpose for visit has shifted slightly. For the year ending September 2021, holidaying accounted for 45% of all visitations, visiting family and relatives 34% and business travel 10% (which represents a 65% increase on the previous year).



¹ Averaged over the period 2011–2020.

Figure 2: Moreton Bay Region tourism results Year Ending Sept 2021

Visitors



TOTAL VISITATION

4.28 million

↑ 10.4%

Day visitors
3.4 million

↑ 13.4%

Domestic overnight
839,569

↑ 5.5%

International visitors
3,208

↓ 93.5%

Visitor Nights



TOTAL VISITOR NIGHTS

2.36 million

↓ 31%

Domestic visitor nights
2.28 million

Average length of stay 2.8 nights

↑ 13.4%

International visitor nights
84,138

Average length of stay 26 nights

↑ 91.1%

Origins (daytrip and overnight)

Brisbane 70%
Sunshine Coast 13%
All other 17%

Visit Purpose



Holiday

45% of all visitors

↑ 5.4%



VFR

34% of all visitors

↑ 0.4%



Business

11% of all visitors

↑ 38.8%



Other

10% of all visitors

↑ 65%

Expenditure



TOTAL VISITOR SPENDING

\$591 million
in the region

↓ 5.8%

50.6%
by domestic day trip visitors

↑ 13.4%

48.6%
by domestic overnight

↑ 8.6%

50.6%
by international visitors

↑ 91.1%

3.3 Tourism products and experiences

Moreton Bay Region offers a mix of accommodation and visitor attractions², spread across beach and hinterland areas.

These tourism assets were catalogued through a tourism product audit conducted in 2021.

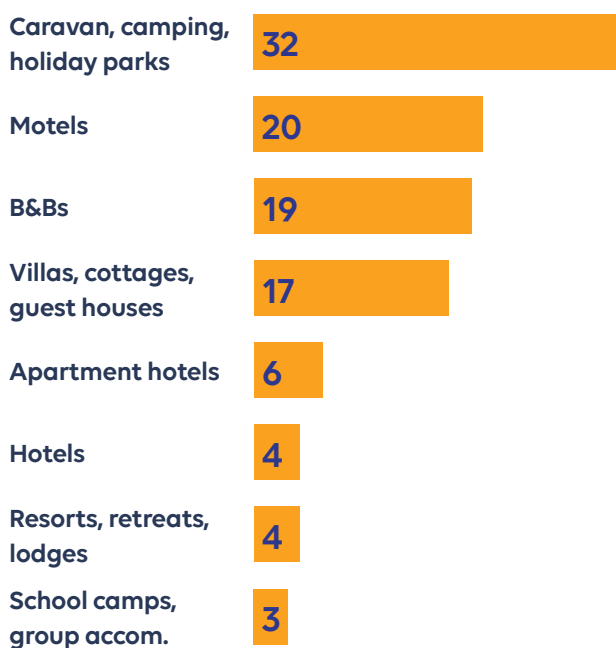
The purpose of the audit was twofold: firstly, to ascertain what is available in the region and secondly to determine what product gaps exist³.

3.3.1 Visitor accommodation

The region has 105 commercial accommodation properties, providing a combined 1,149 rooms. Caravan, Camping and Holiday Parks account for 30% of all properties.

The region's accommodation stock, especially in the hotel sector is modest compared to the current supply in neighbouring areas such as Sunshine Coast and Brisbane.

Figure 3: Accommodation audit results



3.3.2 Visitor attractions and experiences

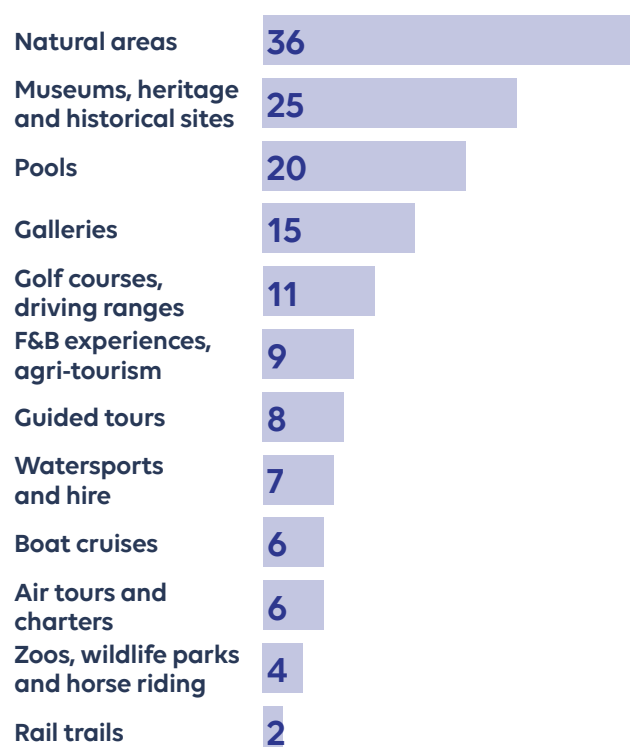
The Moreton Bay Region has 149 tourism attractions.

The audit identified that while there are some attractions dispersed in hinterland areas, most attractions are clustered around the hubs of Bribie Island (29), Caboolture (24) and Redcliffe-Scarborough (28).

In addition, sporting and major venues such as the Moreton Daily Stadium, Morayfield Sport and Events Centre and the Queensland State Equestrian Centre also form an important part of the overall visitor economy infrastructure.

Another key consideration for the region is its lack of commissionable⁴ tourism experiences and the resulting lack of visibility for the region among distributors. The issue reinforces the importance of value over volume focus of this plan – i.e., the majority of 'attractions' are currently free or very low-value experiences, do not drive yield but place increased pressure on community assets/ infrastructure.

Figure 4: Attractions audit results





3.3.3 Leveraging the region’s heritage potential and cultural appeal

Visitors often want to understand what it is like to live where the locals live and experience their culture. A range of aspects contribute in this regard including, First Nations, local music, local performance, local art, local history and contemporary stories. These storylines combine to help create a unique sense of place.

Aboriginal and Torres Strait Islander connection to land, their cultures and traditions, as well as the warmth, humour and generosity of Aboriginal and Torres Strait Islander peoples and communities, are central to Australia’s history and form an integral part of how Tourism Australia tells the nation’s story. With 1.4 million international visitors (17%) participating in Indigenous tourism experiences in Australia in 2019 (a 6% year-on-year increase since 2010), and domestic visitor interest increasing 13% each year since 2013 (source: Tourism Australia website), tourism offers a great opportunity to enhance cultural interaction and revival and bolster employment.

For this reason, Council is committed to supporting the Traditional Custodians of Moreton Bay Region, the Kabi Kabi, Jinibara and Turrbal people to self-determine and pursue their tourism development aspirations.

These heritage stories and cultural experiences are not mutually exclusive from other areas and create a crossover with many other visitor touchpoints including sports and events, performances, and the welcome provided to visitors by local people.

3.3.4 Gap in commissionable experiences

To capitalise on the region’s market advantage, the region requires an increase in the number and range of commissionable tourism products such as privately developed and funded attractions, all-weather experiences, hinterland-based products, and experiences.

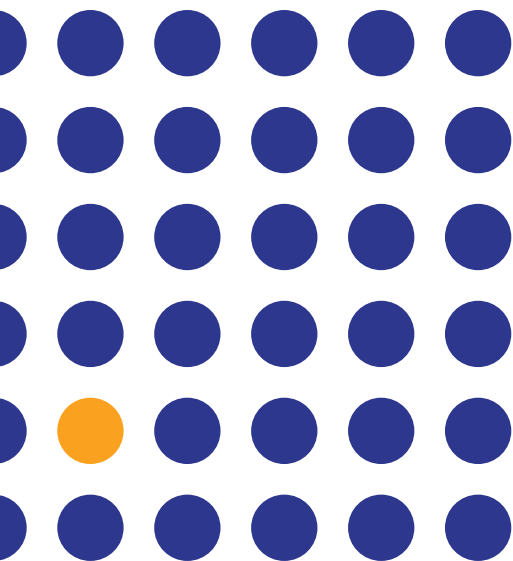
This will help grow visitor demand and assist with geographic visitor dispersal and generate higher levels of visitor spending.

-
- 2 A visitor or tourist attraction is typically defined as a place of interest for visitors, often for its inherent or curated natural or cultural value, historical significance, natural or built beauty, offering leisure and amusement.
 - 3 Based on an extensive ‘data scraping’ exercise which drew content from the Australian Tourism Data Warehouse’s (ATDW), TripAdvisor, Booking.com, Google Travel and Google Maps.
 - 4 Commission is the cost of selling a tourism product (accommodation, tour, experience, activity, attraction) through the tourism distribution system and can be considered a marketing method to capture a customer beyond an individual business’s reach. It creates an opportunity for an indirect sale through a third-party.

3.3.5 The Impact of COVID-19

As a key contributor to the Moreton Bay local economy, the performance of the tourism industry has very tangible economic and social consequences for many people, places and businesses beyond the tourism economy. Many other sectors that support, and are supported by tourism have also been significantly impacted. However, overall sector trends and intelligence indicate there is a range of issues to consider regarding future planning:

- COVID has demonstrated the susceptibility of the visitor economy to external events. The importance of planning for emergencies has been reinforced.
- Business models have been challenged – those businesses focused on international and interstate customers have needed to reconsider services, pricing, and positioning.
- Workforce challenges have been reinforced - businesses lost staff during the pandemic, and lack of international labour has further exacerbated challenges.
- Trading patterns evolved in a domestic-only market, with the accommodation and food & beverage sectors performing strongly in some destinations but, the same levels of demand not being seen in the attractions and experiences sector in all destinations.
- The importance of authenticity and connection to local communities grew – a trend that may remain for some time.
- A destination's ability to offer reassurance to visitors in terms of safety and hygiene factors grew in importance. Expectations for retention of these high standards are likely to remain.
- Opportunity for a destination reset. Several destinations have taken the opportunity to plan for the visitor economy to grow back differently.



3.4 Natural assets

The natural assets of the Moreton Bay Region are significant visitor drawcards, from traditional beach settings and wetlands of international significance, through to key rainforests and lush natural hinterland environments.

The region boasts 294 km of coastline, canals and estuaries and has 2,600 km of streams and waterways associated with three major river systems, the Stanley River, the Pine River, and the Caboolture River. Bribie Island National Park and Recreation Area, Pumicestone Passage and the Bay and Islands are key visitor drawcards.

More than half of the land area in the region is made up of bushland reserves, national parks, state forests, neighbourhood parks and other natural areas suitable for picnics, walking trails and outdoor events.

The steep forested slopes of the D'Aguiar — Blackall and Conondale Ranges are all of regional or state significance. Located through the north-western highlands, the Conondale Range Crossing Corridor links two sections of Bellthorpe Forest Reserve to the Conondale Corridor. The D'Aguiar Range Corridor in the southwest connects several regional ecosystems through woody vegetation to Mt Mee Forest Reserve and the Mount Pleasant locality in Pine Rivers. The Blackall Range corridor links areas of regional significance including Vine Forest and Blackbutt Open Forest on Igneous Rocks with areas of woody vegetation.

With the popularity of outdoor experiences increasing at a rapid rate, there are many opportunities for the region to leverage its natural assets to attract visitors to the region. With 31 State Protected Area Estates, 250 Bushland Recreation Parks, and 243 Conservation Areas, the region has an advantage over major city destinations that have a comparably limited number of natural assets.

This view was shared by a majority of community stakeholders who provided input into the tourism experience audit, who noted the region's best tourism assets are its natural assets, including beaches, waterways, national parks, and other natural areas.

The critical issue for the region however, is ensuring the economic benefits to the region from visitors accessing natural assets are greater than the costs of maintaining these assets and the supporting infrastructure. Presently, there are only a limited number of experiences that leverage the strengths of the region's geography and natural assets.



North Pine Dam

With 524 bushland parks, conservation areas and State protected estates, the region has strong ecotourism advantage over major city destinations. The largest 40 areas are key tourism assets:

D'Aguilar National Park
Beerburrum West State Forest
Beerburrum East State Forest
Bribie Island National Park
Bellthorpe National Park
Bribie Island State Forest
Glass House Mountains Conservation Park
Mount Mee State Forest
Wararba Creek Conservation Park
North Lakes Environment Reserve
Ningi Creek Conservation Park
Buckleys Hole Conservation Park
Sheep Station Creek Conservation Park
Bellthorpe State Forest
Beachmere Conservation Park
Delaneys Creek State Forest
Deception Bay Conservation Park
Wararba Creek Conservation Park
Buckley's Hole Conservation Park
Lagoon Creek Reserve

Glass House Mountains National Park
Bunyaville Conservation Park
Burpengary Environmental Park
Brian Burk Reserve
McNaught Road Environmental Reserve
Morris Park Rothwell
Peachester State Forest
Samford Conservation Park
Byron Creek Conservation Park
Allison Booker Court Reserve
Bellthorpe Forest Reserve
Pumicestone National Park
Griffin Environmental Reserve
Clear Mountain Conservation Park
Beachmere South Reserve
Webb Road Reserve
Byron Creek Conservation Park
Bullock Creek Conservation Park
Freshwater National Park
Hays Inlet Conservation Park



3.5 Sector trends

A series of pre and post-pandemic trends have been shaping the sector, including:



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.



Digital disruption

Whilst connectivity issues still create barriers to doing business, opportunities are also presented for digital disruption. Efficiencies created by software solutions, and technological solutions to reduce impact, manage disaster events and seamless sales capabilities can all be achieved by embracing the digital disruptors.



Rising uncertainties

World events will continue to shape geopolitical relationships and the economic outlook. Uneven recovery will be realised globally over the next ten years. Further challenges will be realised with an extremely competitive marketplace as domestic and international destinations vie for returning visitors. International leisure, MICE, and international student markets will recover at varying speeds.



Self-drive and touring will continue to be key market segments

COVID travel restrictions boosted the appeal of self-drive holidays from domestic customers. With record levels of RV and caravan sales, and the continued popularity of 4WD vehicles, self-drive will continue to be a key sector for most destinations.



Continued growth in 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 an outdoors lifestyle is leading to the recovery after the COVID pandemic. TEQ's 'travel for good' marketing brand concept not only acknowledges consumers' desire for physical health and well-being but that of the mind and the heart, as well as the key themes of sustainability and protection of the environment.



Authentic food and drink

Visitors place a much higher emphasis on choosing locations to visit based on the region's local provenance and food offering.



Sustainability

With up to 90% of travellers now seeking sustainable tourism options when they travel⁵, sustainability is no longer a nice to have, but an essential.



Health and wellness

Demand for health and wellness experiences continues to grow, in part driven by the increased desire to reconnect and re-energise during the COVID period. The concept of 'slow travel' will have resonance with consumers looking to reconnect with places. Similarly, there will be a strong desire for experiences that can transform or deliver personal growth.



COVID recovery

With strong investment in tourism recovery by industry and government, visitor numbers are starting to rebound. However, full recovery will continue to be markedly influenced by government travel policies such as vaccine passports and mandatory quarantine requirements. Additionally, the industry is now under increased pressure to embrace digital transition, move to a greener tourism system, and rethink tourism for the future.



Continued investment

Despite COVID disruption, investment in infrastructure and tourism experiences remains strong. As of 30 June 2021, there were 33 tourism projects under development in Queensland totalling \$6.7 billion, most of which were in the arts, recreation and business services sectors. Investment in the stand-alone accommodation sector in 2020-21 totals \$1.3 billion. The 2032 Brisbane Olympics and Paralympics are considered a driver of increasing investor interest.

3.6 Future outlook for tourism

The national outlook for the tourism industry in 2022 and beyond is very positive for the domestic visitor economy. Considerations include:

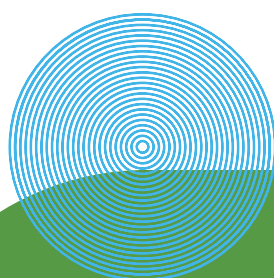
- Sentiment indicators suggest that Australians are keen to travel, and many are actively planning their next getaway.
- Tourism Research Australia forecasts indicate that domestic tourism has already resumed its recovery from October 2021. Domestic tourism growth is expected to continue through 2022-23 and return to a pre-pandemic level in that year. For 2023-24, domestic tourism is projected to surpass the 2018-19 peak. A more moderate growth trajectory is forecast for the period 2023-24 to 2025-26.
- The profile of the domestic tourism market in Australia shows that intrastate is five times the size of the interstate travel market, and regions are more than twice as popular as cities as destinations of choice.
- Travel to visit friends and relatives has been the first segment to fully recover. Travel for holiday purposes is expected to contribute the most growth over the next two years. While business travel will be slower to recover than leisure travel, it is forecast to eventually return to pre-pandemic levels.

For Moreton Bay Region to achieve its tourism growth potential, product development and promotional activities will need to align with the priorities of domestic travellers. These include an increased interest in world-class wildlife and nature encounters, aquatic and coastal experiences and a strengthened focus on safety and security.

The focus for immediate tourism growth in the Moreton Bay Region will therefore be the intrastate and interstate holiday markets that live more than a round-day trip away. The domestic business traveller of the future will also be a key target market to support the time-based dispersal objectives.

3.7 SWOT assessment

Internal factors	External factors
<p>Local tourism strengths</p> <ul style="list-style-type: none"> • Geographical proximity to capital city and major transport hubs • World class natural assets • Tourism experiences are dispersed across diverse locations • Some signature high quality tourism experiences and major events • Strong and desirable lifestyle brand • Strong domestic visitor base • Range of sport, cultural and major events infrastructure • Geographical proximity to capital city and major transport hubs <p>Focus areas</p> <ul style="list-style-type: none"> • Some existing products need to be refreshed in order to meet with rising consumer expectations • Bundling of tourism, cultural, sporting and major events can be better capitalised upon • Need for greater recognition of Moreton Bay Region as an individual visitor brand and its supporting narrative outside Queensland • Visitor dispersal occurs organically, rather than in a managed way • The region's First Nations cultural offering to visitors by traditional owners, the Kabi Kabi, Jinibara and Turrbal people can be elevated 	<p>Local tourism opportunities</p> <ul style="list-style-type: none"> • Existing day visitor base could be converted to increase overnight stays • Latent demand for different commercial accommodation options could be tapped into if product supply were increased • Consumers interest in integration of tourism, sport and major events is high • Natural assets in the region rival other nationally recognised visitor brands, providing an opportunity to align with TEQ's marketing focus on 'Travel for Good' • Key sites and a market for branded hotel investment in the region are substantiated • Global interest in upcoming major events, including the 2023 FIFA Women's Soccer World Cup, 2027 and 2029 Rugby World Cups and 2032 Olympics Paralympic Games provide opportunities to raise the profile of the region • Strong interest by traditional owners, the Kabi Kabi, Jinibara and Turrbal people to deliver First Nations cultural tourism <p>Focus areas</p> <ul style="list-style-type: none"> • Many destinations are aggressively pursuing the rebounding domestic market • There is aggressive competition for hotel investment across Australia • SEQ destinations will be concurrently pursuing sport and major events infrastructure investments to support the major events up to 2032 • Other destinations have established ecotourism and wellness offerings, which have increasing relevance to target markets







4 Tourism vision for the Moreton Bay region

4.1 Vision

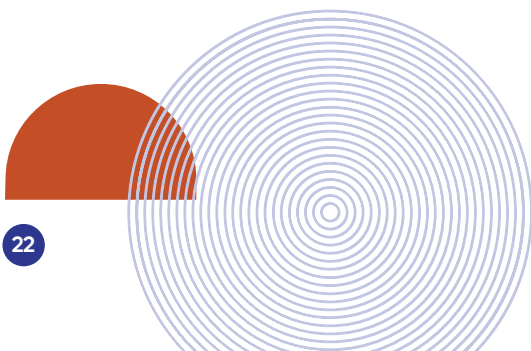
The overall vision for the visitor economy in Moreton Bay Region is to nurture and drive sustainable economic growth in the visitor economy that contributes fully to quality of life for Moreton Bay communities and businesses.

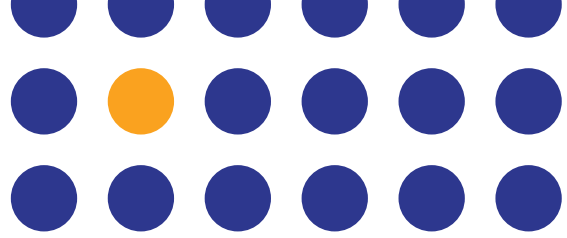
4.2 Growth themes

The visitor economy vision for the Moreton Bay Region will be delivered via six growth themes:

1. **Striving for tourism value over volume – growing yield and a focus on creating a more even balance between overnight and day trippers to derive greater economic benefit**
2. **Safeguarding against over-tourism**
3. **Creating an accessible and welcoming environment**
4. **Encouraging visitor dispersal**
5. **Investment or reinvestment in an improved depth and range of experiences**
6. **Collective action that ensures that #TeamMoretonBay works together to leverage the region's locational advantages and connects with new markets**

The catalytic investment opportunities identified in section 6 of the plan align with and contribute to these growth themes.





4.2.1 Striving for value over volume

Many destinations around the world that have high visitation levels have reset their tourism priorities in recent years. This has brought to the fore a groundswell of interest in growing tourism value-over-volume. New Zealand has been pursuing this strategic objective for the past two decades and has concluded the strategy delivers environmental benefits.⁶ The approach, however, is not without its drawbacks. The World Travel Council cautions that 'value-over-volume' policies can result in destinations becoming unaffordable and inaccessible to the non-wealthy.⁷

For Moreton Bay Region, the demographic diversity of the current tourism base delivers positive socio-cultural benefits to the region. For this reason, no actions will be undertaken to change the socio-cultural or economic profile of the existing market.

To ensure the current lifestyle standards of the region and the amenity enjoyed by locals and visitors alike is preserved, the growth of the tourism economy will be focused on growing value over volume. The primary objective of tourism development and promotion will therefore be showcasing and improving the quality and quantity of tourism offerings that keep visitors in the region for longer and spending more with local businesses.

4.2.2 Safeguarding against over-tourism

Tourism and hospitality are key industries and major contributors to Moreton Bay Regional economy; supporting 3,800 direct jobs and an additional 2,200 jobs in the supply chain. Tourism is also a key lifestyle driver in the region. For future generations, tourism offers a great opportunity for export growth, which stimulates increased capital investment and an uplift in employment choices in the region.

Destinations of high appeal, such as the Moreton Bay Region are at risk of the impact of tourism negatively influencing the perceived quality of life of residents and the quality of visitors' experiences if tourism growth is not managed responsibly.⁸ To safeguard against overtourism, congestion management, careful planning, as well as product diversification to support geographical and time-based dispersal are paramount.

Of all the strategies and measures to ensure responsible tourism growth, congestion management is the most complex. Being typically a localised issue, it requires a multifaceted approach as not all congestion issues stem from those temporarily visiting an area. Often residents and commuters contribute to excess demand for high-quality spaces and services. Consequently, the TOP must be understood in the context of the planned Moreton Bay Regional Growth Management Strategy 2041 and associated integrated transport plans. Notwithstanding this, a range of actions will be undertaken to:

- Support the development of innovative products and experiences that diversify demand in time and space and direct people off the beaten path in ways that leaves as little impact on the local culture or environment as possible
- Support the adoption of smart technologies that assist with congestion management
- Ensure that destination management considers infrastructure overuse and informs future infrastructure priorities
- Enhance the integration of local communities in the tourism value chain
- Regularly monitor the perception of local communities towards tourism and promote the value of the sector among residents.

6 Thinkstep ANZ, *Visitor Value Versus Volume for International Tourists to New Zealand*, October 2020.

7 McKinsey & Company and World Travel & Tourism Council, *Coping with success: Managing overcrowding in tourism destinations*, December 2017.

8 UNWTO, *Overtourism'? – Understanding and Managing Urban Tourism Growth beyond Perception*.

4.2.3 Creating a welcoming and accessible environment

Responsible tourism growth that delivers maximum social and economic benefits for the Moreton Bay Regional community must inherently be accessible. With 5.6% of people living in the Moreton Bay Region reporting some degree of activity restriction, an accessible tourism industry will ensure that diverse quality lifestyle experiences that leverage the assets of the region are open to and benefit all.

Accessible tourism will equally support local jobs, with an estimated \$8 billion annual worth in Australia, it makes sound economic sense for the region.

Over 4 million Australian adults have a disability (approximately 20%) or long-term health condition. The current estimated size of the accessible tourism sector for overnight and/or day trip travel is around 1.3 million individuals (7% of the total Australian adult population). However, many people with a disability travel with others (some requiring a carer) generating an average multiplier of 2.45 for overnight travel and 2.62 for day trips.

By this measure, the size of the domestic market for accessible tourism is 14% of the Australian population (an estimated 3.4 million people). Due to the ageing population, the disability sector is set to grow.


In the context of tourism products and services, Moreton Bay Region's aspiration is for the widest possible interpretation of accessible tourism - looking beyond physical access to also include an attitude and willingness to ensure all visitors feel welcomed and can experience the same/similar experience as all other visitors. Accessible tourism applies to every aspect of a tourism experience, including lodging (accommodation), hospitality, attractions, transport, outdoor spaces, and activities.

Some of the highest levels of accessibility across Moreton Bay include:

- The Redcliffe foreshore and the kilometres of level paved walkways
- Beach access points (via accessible beach matting), both at Woorim Beach (Bribie Island) and the newly installed ramp and matting at Sutton's Beach Redcliffe)
- The accessible walking trails, both in the Southern D'Aguilar National Park (Jolly's Lookout and Westridge Outlook) and Piccabeen Walk at The Gantry Day Use Area
- Council's galleries and museums are accessible both by physical design and professional staff experience (The Michele Vine Soft Touch exhibition at Caboolture Region Art Gallery (CRAG) in late 2021 was an exhibition of high calibre in this regard and had excellent programming with a strong accessibility focus)
- The Caboolture Historical Village and their attitude towards access and inclusion
- G'Day 4x4 Adventure Tours (Bribie Island) and their positive attitude to assist travellers with a disability to experience their services/tours.

Accessible beach matting,
Woorim Beach





To expand and strengthen the depth of tourism accessibility in the region, action will be undertaken to:

- Support the improvement of skills of existing tourism operators
- Enhance marketing efforts for existing accessible tourism activities, experiences and infrastructure
- Identify and pursue grant funding opportunities to facilitate accessible upgrades/infrastructure
- Advocate for greater investment in accessibility upgrades in National Parks
- Support an increase in the number and diversity of tourism opportunities that are accessible.

4.2.4 Encouraging visitor dispersal

Moreton Bay Region, with its geographic spread of accommodation and visitor experiences already enjoys a sound level of geographical dispersal of tourism across the region.

Figure 6 outlines visitor numbers by sub-area for all day and overnight visitors across the region in the year ending September 2021.

The current dispersal pattern however is still an important consideration for responsible tourism growth for the region. While Moreton Bay Region does not face the typical challenge of drawing visitors from the coastal strip to the hinterland, which is a common problem for destinations with a similar diversity of landscapes, it does still have a number of significant tourism hotspots. Pressure on these tourism hot spots could be eased and the benefits of tourism will be spread more widely through enhanced dispersal patterns.

The starting point in the region to influence dispersal patterns is the development and promotion of tourism offerings in many small destinations with low visitation levels that sit between or adjacent to the coastal and hinterland tourism hot spots in the region.

This will not however automatically lead to a shift in consumer behaviour. The region has substantially high numbers of day visitors that live within a 100 km radius of regional boundaries. Shifting the propensity of these visitors from same-day round trips to overnight visitors is one of the greatest barriers the region will need to overcome in order to achieve increased dispersal of existing visitor markets.

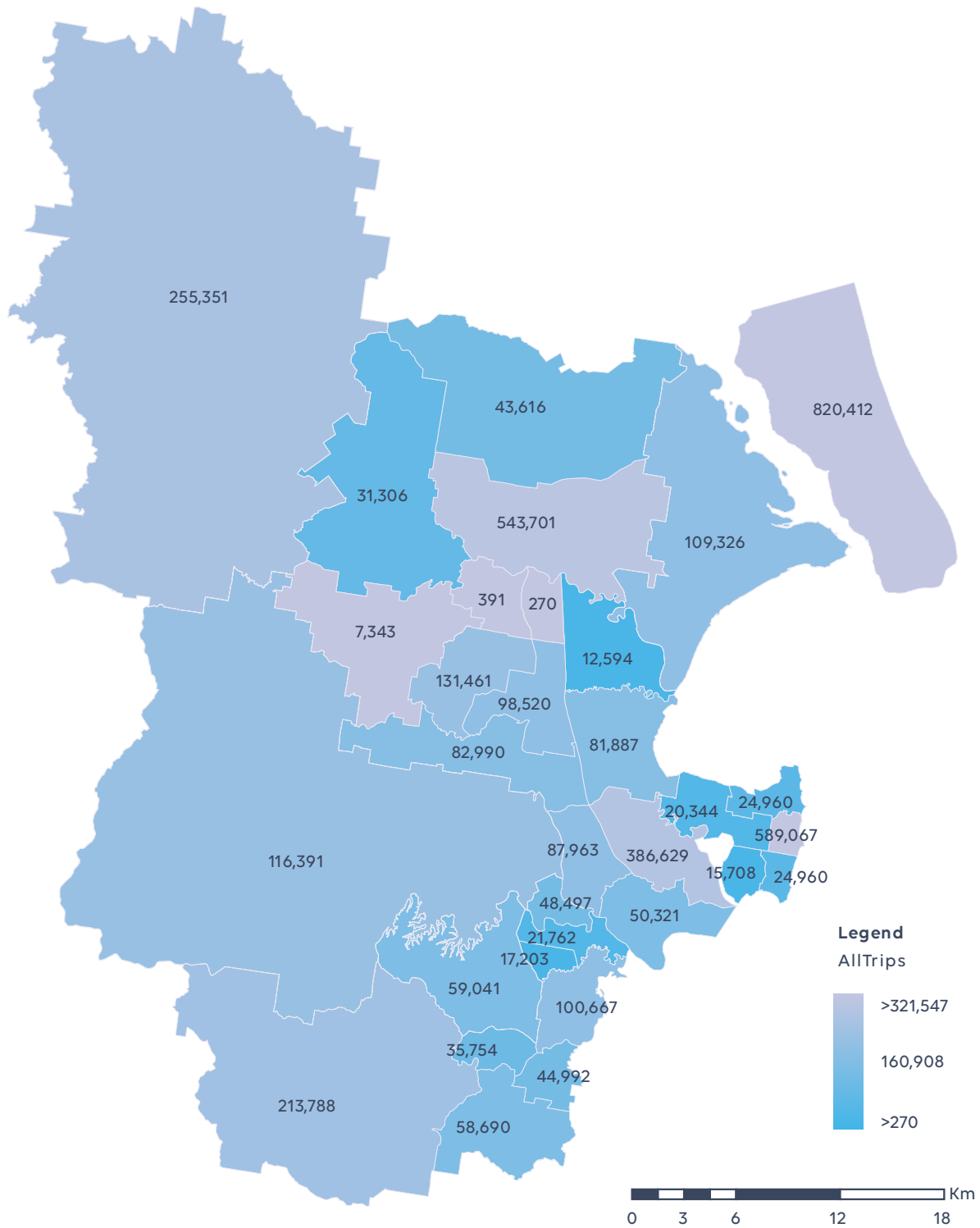
Conversion of day trippers to overnight visitors will require an increase in the range of accommodation options (including branded hotels) available in the region, multi-day product bundling, an active night-time economy, as well as platforms for visitor relationship management that are used to build and foster visitor affinity with the region.

Council investment in securing and elevating signature events, festivals and elite sporting content during the low seasons will play a critical role in stimulating the night-time economy and providing content that can be packaged with mainstay tourism offerings. A comprehensive off-season major events program will also drive time-based dispersal of tourism demand.

Effective tourism dispersal spreads tourism benefits across the region and across the year - easing pressure on tourism hot spots

Figure 6: SA2 year ending September 2021, total visitor dispersal

Regional dispersal of total day and overnight visitors in each location, year ending September 2021



4.2.5 Investment or reinvestment in an improved depth and range of experiences

Great visitor destinations are often characterised by having a cluster of high-quality and authentic experiences. Investment in existing or new experiences is a key enabler if the region is to provide the depth of experiences that incentivises trips and encourages visitors to choose the Moreton Bay Region. Depth of experience options is also a key determinant to incentivising repeat visits.

Increasingly, perceptions of destinations are also formed in large part on signature or must-see experiences – those special features, products or places that motivate trip decisions. For a destination such as Tasmania, MONA has been credited with playing a significant role in changing perceptions of the destination.

This plan recognises the need for Moreton Bay to expand its 'reasons to visit' and grow the depth of its product and experience mix. The opportunities identified in sections 6 and 7 of this report are intended to support this ambition.

4.2.6 Collective action

The tourism industry in the Moreton Bay Region has many important stakeholders, who together can deliver tourism growth that will support the region's bigger, bolder and brighter future. Implementation of the Tourism Opportunity Plan will sit within the new delivery framework established for the Regional Economic Development Strategy 2020-2041. Under this framework, the collective strength of key stakeholders will be unified and harnessed.

A key delivery partner of the Tourism Opportunity Plan will be Moreton Bay Region Industry & Tourism (MBRIT), which is the official Destination Management/Local Tourism Organisation for the Moreton Bay Region.

MBRIT is responsible for destination marketing and promoting the region to tourism visitors. MBRIT also hosts and attracts a wide range of events, festivals and conferences to the region and provides tourism industry support services and networking opportunities.

The scope of MBRIT's contract with Council will additionally include product development and destination management that extends to working with various local stakeholders to enhance the appeal of the destination and its ability to generate revenue for the community.

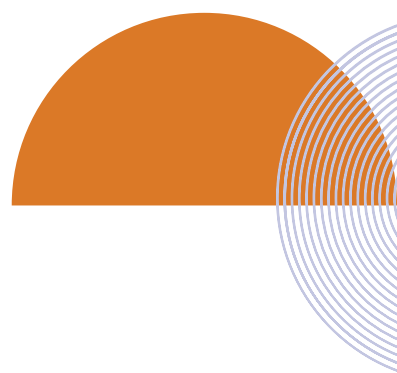
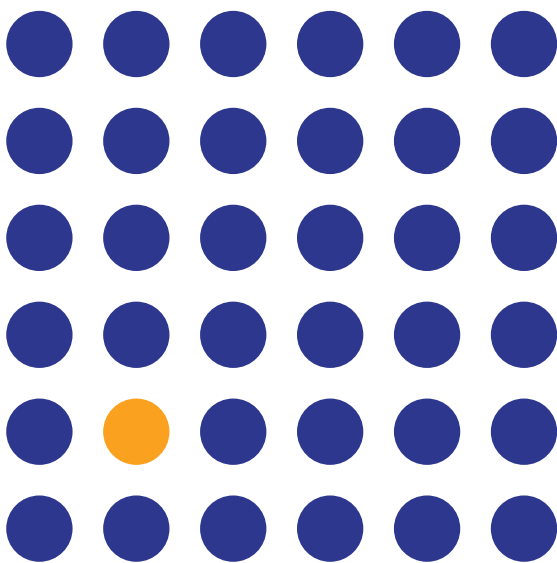


Figure 7: National visitor information centre group reporting, contributors to a successful tourism economy

VICs

- Main visitor touch point in desination
- Enhance visitor experience
- Tell the story of the destination
- Assist with visitor information needs
- Extend industry reach
- Sell local produce
- Enhance community pride

Tourism Australia

- Attract visitors to and throughout Australia
- Maintain current industry research
- Increase economic benefits from tourism

Tourism industry

- Create and market product and services to attract visitors
- Create and retain jobs and upskilling
- Enhance community pride
- Facilitate conservation of natural, heritage and cultural assets

DNs / RTOs /LTOs

- Promote region to attract visitors
- Increase market reach
- Support industry growth
- Encourage investment in infrastructure and product

Local government

- Influence level and quality of visitor
- Facilitate economic growth
- Attract investment
- Provide infrastructure and community servives
- Regional tourism funding
- Job creation

Community

- Promote the local area and share its stories
- Provide labour resources



STOs

- Increase market awareness
- Attract visitors to and throughout state
- Provide regional tourism and event funding
- Build market knowledge
- Facilitate product and experience development
- Support industry upskilling
- Attract investment

Business

- Provide goods and services to meet visitor needs
- Generate economic growth
- Support events
- Attract business visitors
- Create and retain jobs and upskilling





5 Top growth opportunities

Activation and investment can deliver experiences that complement and add value to the Moreton Bay landscape, precincts and existing experiences.

They can also foster the enhancement of experiences that are not yet fully formed but contribute to the region's unique positioning. These experiences are a mix of both easy to implement and aspirational long-term visionary experiences that while innovative, would require significant further detailed analysis to determine feasibility. The common element across all is the potential to drive further economic activity for the Moreton Bay Region through place activation, new product development and enhancing the region's places and spaces.



Caboolture to
Wamuran Rail Trail

5.1 Understanding the gap

As noted in section 3.3, a tourism product audit identified that the majority of the current 149 tourism attractions/ experiences in the region are clustered around the hubs of Bribie Island (29), Caboolture (24) and Redcliffe-Scarborough (28). The audit also highlighted that 24% of attractions are natural assets and that many historic sites of significance are yet to be activated into tourism drawcards.

Whilst the natural beauty of the region is an attractor for day trip visitors, low visitor spending is often associated with these assets.

Moreton Bay Regional Council has also recently completed a Short-Term Commercial Accommodation Demand Study for the region, which identified a limited supply of full-service hotel accommodation, with only 204 full-service (branded) rooms available to accommodate peak demand, which reached 4.47 million visitor nights in 2019.

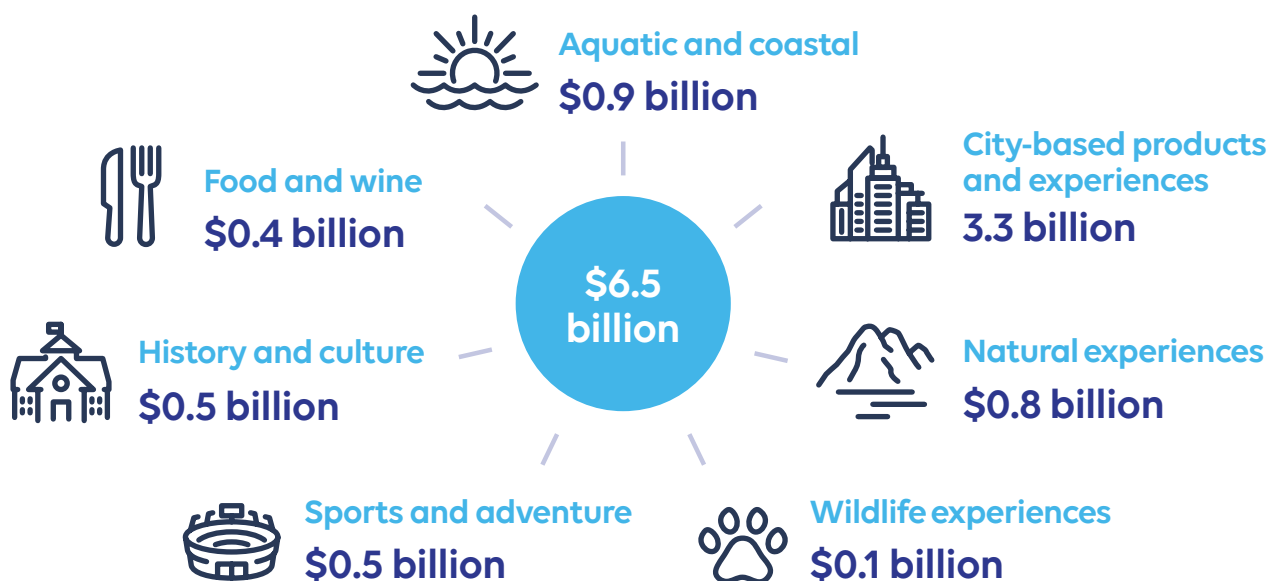
A lack of supply/product is one of the greatest barriers to growing visitor yield and the number of visitor nights spent in the region.

The addition of more commissionable (paid) products in the region will open up a significantly larger distribution network for the region to support the attraction of higher-yielding visitors from intrastate, interstate and international visitors and support the region's ambition to generate more overnight stays.

More paid experiences are also important for generating stronger economic benefits from the visitor economy by encouraging a longer length of visitor stay and a stronger tourism profile.

Analysis undertaken by Brisbane Marketing/ Brisbane EDA showed that the Brisbane Tourism Region which includes the Moreton Bay LGA has an opportunity to capture an additional \$6.5 billion in additional visitor spend per annum in 2031 if the region continues to drive the length of stay and spend on experiences (Brisbane Marketing, 2019).

Figure 8: Brisbane Tourism Region: Additional visitor spend by experience category





5.2 Tourism infrastructure opportunities

To grow the value of tourism and overnight visitation across the Moreton Bay Region there is a need to support the growth of several commissionable attractions and experiences in the region.

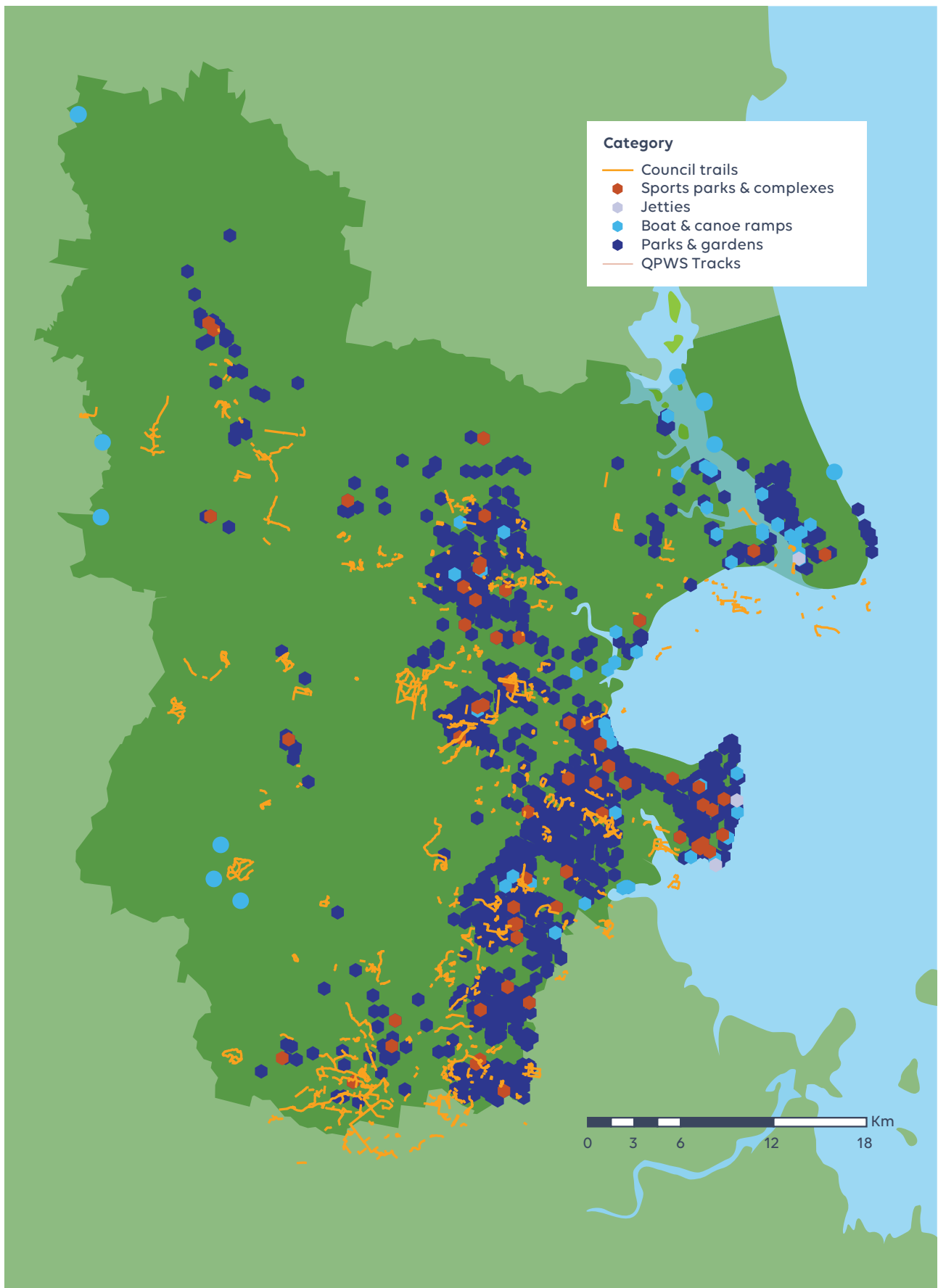
New commissionable (paid) experiences added to existing experiences will support cooperative marketing campaigns to ensure the region taps into not only direct sales channels, but also the distribution channels through retail, wholesaler and agent networks.

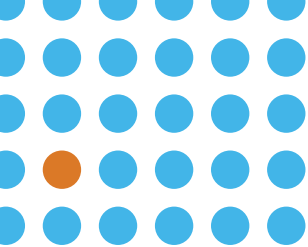
The tourism opportunity product project identified 67 new/expanded infrastructure opportunities. The list included accommodation projects, attraction/experience-based projects, event development projects, infrastructure projects, mixed-use development projects or tourism transport projects.

As of necessity, many of the recommendations identified are supply-led and are aimed at introducing more commissionable product to the region's tourism offering. This is seen as an important requirement to build a far stronger visitor economy and to specifically generate more local visitor economy jobs.

For the Moreton Bay Region, tapping into the opportunity these infrastructure enhancements present is incredibly important. The change in visitor type and the visitor expenditure expected will be broken up across a range of experience categories with the opportunities and potential additional visitor spending. Figure 9 highlights the distribution of community facilities that are also of interest to visitors. The proximity of these to the list of opportunities has been taken into consideration when determining the top eight opportunities.

Figure 9: Council facilities of interest to visitors across Moreton Bay Region



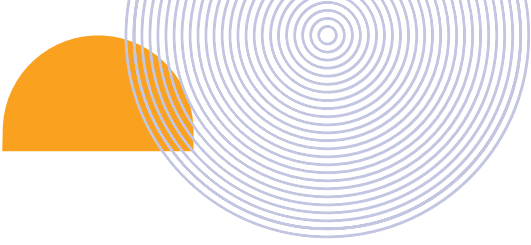



From the list of 67 opportunities, a top eight (8) have been grouped and prioritised as part of the TOP for further analysis/investigation and to seek out private sector investment or co-investment. These are:

Project #1	Growth themes		Descriptor and opportunity
 <p>Hinterland destination holiday park</p> <ul style="list-style-type: none"> • Private investment • Short to medium-term • Need to consider zoning issues and DTMR/road issues for hinterland uses • Costs with compliance around Bushfire Hazard and EPBC Act • Large site required >8 Ha 	1. Striving for tourism value over volume	✓	Moreton Bay Region needs more caravan and camping grounds.
	2. Safeguarding against over-tourism		There is strong market demand (before COVID and post) for quality branded destination holiday parks that can offer:
	3. Creating an accessible and welcoming environment	✓	<ul style="list-style-type: none"> • Larger powered RV sites • Other powered caravan sites • Powered camping sites • Cabins
	4. Encouraging visitor dispersal	✓	<ul style="list-style-type: none"> • And complementary recreational facilities (water play parks etc.).
	5. Investment or reinvestment in an improved depth and range of experiences	✓	The success of the Big 4 Caravan Park at Sandstone Point has shown what the potential is from a tourism attraction perspective.
	6. Collective action		<p>Locating a signature caravan park in the hinterland will assist with dispersal and converting day visitors to overnight visitors.</p> <p>The region's National Parks and drives offer the perfect city getaway from Brisbanites and a site around the Dayboro area would lend itself positively to hinterland dispersal.</p> <p>Additionally, assistance to allow farms to provide low-impact camping and caravanning will also be explored.</p>

Project #2	Growth themes		Descriptor and opportunity
 <p>Hinterland adventure hub lodge and hinterland glamping</p> <ul style="list-style-type: none"> • Private investment • Medium-term • Current zoning issues • Ability to access national parks for walking trails (QPWS) • Costs with compliance around Bushfire Hazard and EPBC Act 	1. Striving for tourism value over volume	✓	<p>A site next to/near Bellthorpe National Park for an eco-lodge and adventure activity hub would be ideal. The road up through the National Park is unique in its high-quality construction and design and offers an element of the attraction of the site. This would be one of the most interesting quality alpine-style zig-zag roads in South East Queensland.</p> <p>A site that could accommodate a 4-star eco-lodge for 20 plus rooms, along with a restaurant and other required facilities would be ideal. It could also act as the staging post or endpoint for a great walk.</p> <p>The elevation at Bellthorpe also provides an attractive site for various potential adventure activities which could include a canopy walkway experience, a multi-level zipline experience or even a luge experience.</p> <p>It is intended that the adventure hub especially would be user-friendly to all age groups and a quality recreational asset for the local communities across Moreton Bay.</p>
	2. Safeguarding against over-tourism	✓	
	3. Creating an accessible and welcoming environment	✓	
	4. Encouraging visitor dispersal	✓	
	5. Investment or reinvestment in an improved depth and range of experiences	✓	
	6. Collective action		





Project #3	Growth themes		Descriptor and opportunity
 <p>Wellness facility (with rockpools, F&B, eco-cabins)</p> <ul style="list-style-type: none"> Public-Private investment Medium-term Current zoning issues Access to site 	1. Striving for tourism value over volume	✓	<p>To achieve the identified potential investment, improvements are required to car parking, river access, changing sheds, and potentially property acquisition for the development of a hub to include a small café and wellness facility.</p> <p>The potential exists to undertake development in stages and as budgets allow but could also provide Council with the opportunity to consider partnerships with skilled operators to offer suitably scaled facilities.</p>
	2. Safeguarding against over-tourism	✓	
	3. Creating an accessible and welcoming environment	✓	
	4. Encouraging visitor dispersal	✓	
	5. Investment or reinvestment in an improved depth and range of experiences	✓	
	6. Collective action		

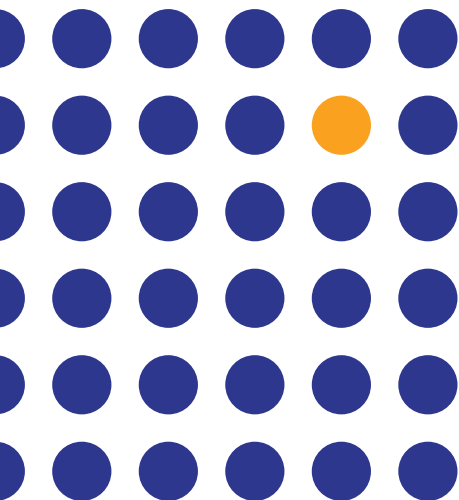
Project #4	Growth themes		Descriptor and opportunity
 <p>Rail trail facilities and infrastructure</p> <ul style="list-style-type: none"> Public-Private investment Medium-term Current zoning issues Finding private partners to activate 	1. Striving for tourism value over volume	✓	<p>While an existing rail trail exists and offers an important local recreational and visitor attraction, this asset is missing supporting infrastructure at the end of the rail trail such as a pop-up café and potentially a smaller scale glamping accommodation facility to help grow visitor spend levels and length of stay.</p> <p>Council owns land east of Wamuran and close to and in part, on the rail trail which may offer a suitable site.</p> <p>The challenge for many rail trails, walking trails generally and mountain biking trails is that while they encourage users to venture through scenic parts of regions, they often fail to include ways to grow the economic uplift to a sub-region through introducing commercial services and amenities so visitors can spend while in areas.</p>
	2. Safeguarding against over-tourism		
	3. Creating an accessible and welcoming environment	✓	
	4. Encouraging visitor dispersal	✓	
	5. Investment or reinvestment in an improved depth and range of experiences	✓	
	6. Collective action	✓	



Project #5	Growth themes		Descriptor and opportunity
 <p>Major waterfront aquarium</p> <ul style="list-style-type: none"> • Private investment • Medium to long-term • Zoning considerations 	1. Striving for tourism value over volume	✓	<p>The Redcliffe Peninsula provides an appealing area for an all-weather built visitor attraction of which there are few in the LGA.</p> <p>Several locations contain large car parking facilities, retail and dining facilities, the chance to watch various ships, boats and recreational vessels etc. pass through Moreton Bay and other complementary on-water activities.</p> <p>A more significant aquarium attraction that acts as a visitor attraction; a research laboratory for investigating and monitoring aquatic and estuarian life in Deception Bay, the Caboolture and other river systems, and in Moreton Bay generally; and/or a training facility linked to a university for marine biology courses (for example).</p> <p>A University partner might also be able to be attracted to the initiative.</p>
	2. Safeguarding against over-tourism	✓	
	3. Creating an accessible and welcoming environment	✓	
	4. Encouraging visitor dispersal		
	5. Investment or reinvestment in an improved depth and range of experiences	✓	
	6. Collective action		



Project #6	Growth themes		Descriptor and opportunity
 <p>Ferry service (around/ throughout Moreton Bay)</p> <ul style="list-style-type: none"> • Private investment • Medium to long-term • Ability of existing infrastructure to support vessels (or need to upgrade) • State Government approvals 	1. Striving for tourism value over volume		<p>Better utilisation of waterways including from major urban hubs such as Redcliffe to various points around Deception Bay and the wider Moreton Bay as both a public transport service and tourism transport services could be considered.</p> <p>It is very easy at times for visitors to forget there is a magnificent coastline (and offshore islands) for locals and visitors to access. While demand for commuter services for example a fast ferry is not yet known, offering visitors the chance to experience various waterways leading from Sutton Beach to Redcliffe, Scarborough marina, to the Caboolture River (future North Harbour) and up through the Pumicestone Passage provide some interesting options.</p> <p>This could offer a new tourism product potentially and could also be combined with kayaking, paddle boarding or other water-based activities at strategic locations to further enhance the experience.</p>
	2. Safeguarding against over-tourism		
	3. Creating an accessible and welcoming environment	✓	
	4. Encouraging visitor dispersal	✓	
	5. Investment or reinvestment in an improved depth and range of experiences	✓	
	6. Collective action		

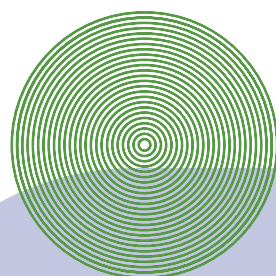


Project #7	Growth themes		Descriptor and opportunity
 <p>Hinterland great walk (with accommodation)</p> <ul style="list-style-type: none"> Public-private investment Long-term QPWS agreement for multi-day walks Identifying sites for overnight accommodation Current zoning issues 	1. Striving for tourism value over volume		<p>Potential exists to introduce great walks, both a 3-day and/ or 2-day experience. The scenery and general topography from Bellthorpe National Park to Mount Mee offer highly attractive vistas.</p>
	2. Safeguarding against over-tourism		
	3. Creating an accessible and welcoming environment	✓	<p>The concept includes a starting point on Council-owned land at Bellthorpe, which adjoins the National Park, and links through to either Mount Mee as a 3-day trek or Woodford as a 2-day trek.</p>
	4. Encouraging visitor dispersal	✓	
	5. Investment or reinvestment in an improved depth and range of experiences	✓	<p>A more detailed alignment needs to be undertaken. The potential for arrangements with QPWS for well-managed overnight camping sites and the option of accessing private land on the edge of the national park for up to two separate accommodation chalets should be explored.</p> <p>Potential also exists to attract a professionally run trekking operator who can offer an interpretation of fauna and flora as part of the experience and could operate either the in-park tent accommodation or the suggested chalets on adjacent private land.</p>
	6. Collective action		



Project #8	Growth themes		Descriptor and opportunity
 <p>Food tourism hub</p> <ul style="list-style-type: none"> • Public-private partnership • Medium-to-long term • Need to consider zoning issues 	1. Striving for tourism value over volume	✓	<p>Moreton Bay has a variety of farming operations ranging from cattle and dairy farms to cropping, fruit and vegetables.</p> <p>Opportunity to create a food emporium of the best produce of the region in one location, so regardless of the time of year, visitors and locals can visit to purchase high-quality produce, sample produce and potentially see some items being made in a small agri-tourism incubator facility which may act as an innovation hub.</p> <p>The facility would be a visitor attraction, a showcase for the region's fresh produce, and potentially a location to host a cooking school or smaller-scale food events.</p> <p>The facility is likely to be a joint public-private partnership opportunity as some parts of the concept should be commercial and attract private sector funders. While other components, unlikely to generate a commercial return, are important public good elements to support community needs and the broader visitor economy and require support.</p>
	2. Safeguarding against over-tourism	✓	
	3. Creating an accessible and welcoming environment	✓	
	4. Encouraging visitor dispersal	✓	
	5. Investment or reinvestment in an improved depth and range of experiences	✓	
	6. Collective action	✓	

Figure 10, page 41, represents the location of these eight priority opportunities, along with the location of tourism developments already in the pipeline, overlaid on a heat map showing the dispersal of visitors across the region in 2021.



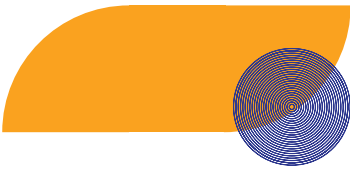
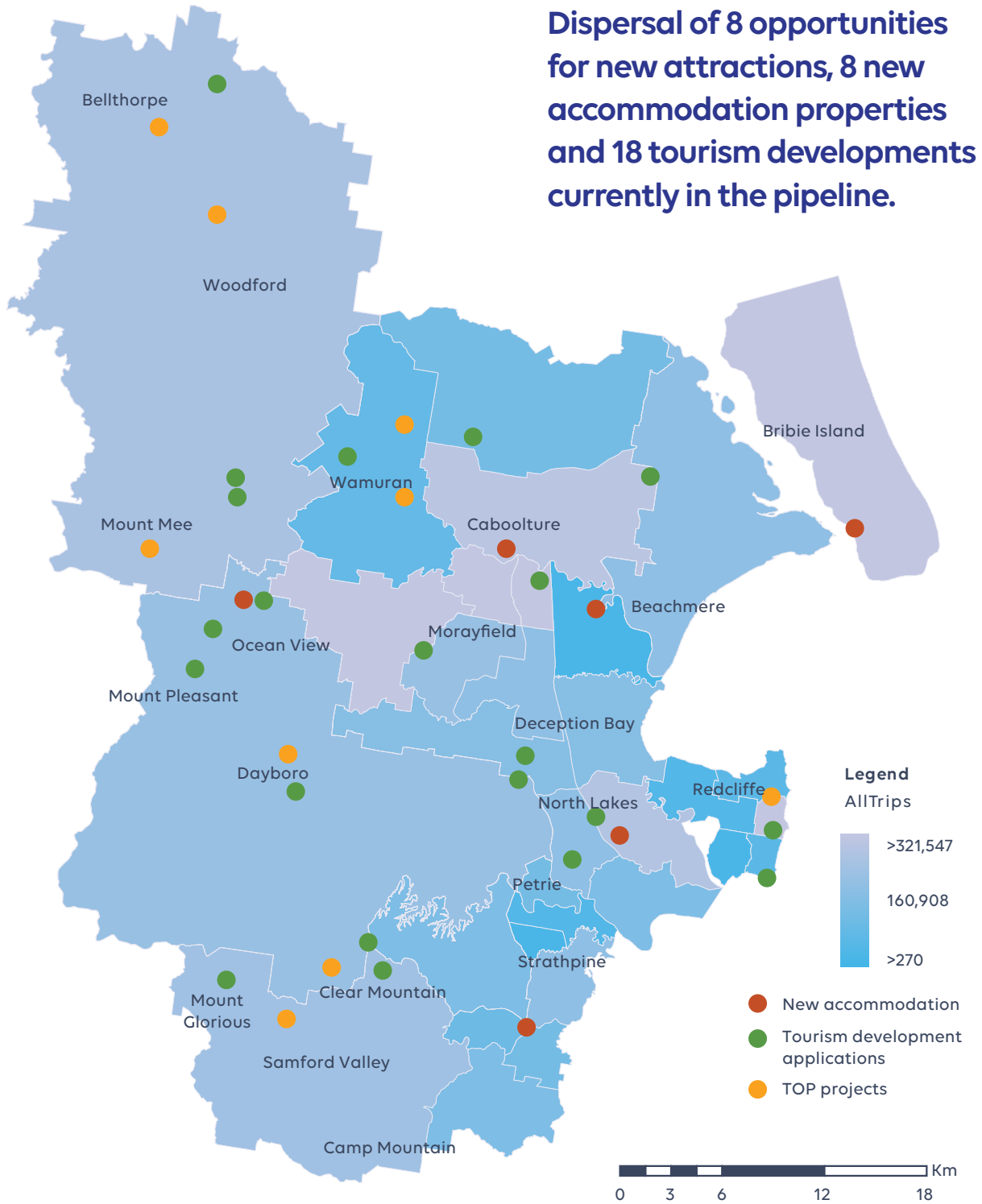


Figure 10: Eight listed tourism opportunities and 18 tourism developments in the pipeline overlaid on visitor dispersal heatmap



Four (4) other opportunities have been identified for Council to explore in the short-to-medium term which requires a smaller investment in public infrastructure and/or activation of public spaces via Council (and/or potentially the State Government). The four opportunities are:

	Descriptor and opportunity
 <p>Pumicestone Passage kayaking tours</p>	<p>The potential may exist for establishing kayaking tours down through the Pumicestone Passage as a unique way to view both Bribie Island and the opposite coastline going toward the Sunshine Coast.</p> <p>This project could be a good profile-raising opportunity for the region as many visitors are also looking to undertake water-based tours which get them far closer to the natural environment.</p>
 <p>Indigenous tours (focused on birds, walking and bush tucker and cultural heritage)</p>	<p>The potential should exist for different forms of tour operations which may be able to use appropriate sites for bird watching etc. at Mount Glorious, walking and bush tucker and other cultural heritage tours throughout the region.</p> <p>The cost to a private sector operator to get established should be relatively low, though support for access to reserve sites and national parks may be needed from Council and/or the State Government.</p> <p>Currently, the region is characterised by many free experiences visitors can undertake, and a far lesser number of commissionable product options. Commissionable products get promoted by tour operators, wholesalers and other tourism intermediaries, and can be listed on the Australian Tourism Data Warehouse of things to do in the region.</p>
 <p>Equine trail with tours</p>	<p>Similarly, to other tours identified, a series of equine trail tours will support the current investment which has been made into equine trails already and offer visitors the chance to go with an experienced tour operator who is fully equipped.</p> <p>Without a tour operator, the equine trails in the region are more likely to be mostly used by local horse owners. To this end, they risk being good recreational facilities for a local market rather than supporting the broader visitor market.</p>
 <p>Enhanced fishing spots and Tours</p>	<p>There is the potential to improve a range of fishing infrastructure across the region and make it more accessible.</p> <p>Potential also exists to introduce guided fishing tours on key waterways from our internal lakes, and rivers to the Bay and even kayak fishing on Pumicestone Passage.</p>

5.3 Tourism accommodation (branded hotels)

While there are 107 commercial accommodation properties across the region (including caravan parks), the short-term accommodation audit of full-service accommodation identified there were only 204 rooms out of a total of 722 rooms in the region across hotels, motels, serviced apartments (self-catering units) that were full-service.

The 722 are made up of 290 internationally branded hotel rooms and 432 non-branded rooms. The 204 full-service rooms span three full-service hotels (equivalent to 26% of total commercial rooms available) including the 51-room Mercure Clear Mountain Lodge and 63-room Best Western Plus North Lakes Hotel (both internationally branded hotels) and the independently operated (non-branded) 90-room Eatons Hill Hotel.

In a market that welcomed 4.85 million visitors in 2019 (at the pre-pandemic peak) and generated 4.47 million visitor nights, Moreton Bay is significantly undersupplied with hotels to support the needs of a growing economy.

There is also a limited number of properties that leverage the strengths of the region's geography and natural assets.

Although hotel accommodation in and of itself is not a demand driver for a region, attractions and experiences in the region are important to supply side opportunities. If visitors travel to the region and are unable to find a hotel that meets their requirements, then there is a significant possibility that the region could miss out on expenditure and economic opportunity.

The benefit of hotels lies beyond just an uplift in Gross Regional Product (GRP) and employment measures. Hotels are a vital part of creating active and attractive destinations

and communities. Hotels within an area add vibrancy and energy to precincts throughout the day; they create an evening economy for restaurants, bars, theatres and entertainment; they create a sense of destination and lifestyle, and they complement existing uses (e.g. sports facilities) and support others (e.g. offices, conference venues, hospitals and universities).

A particular benefit of hotels, in contrast to other businesses, is that the multipliers are not just about the hotel itself, its supply chain and employees' spending power, but also the guests staying in the hotel who in turn spend locally at visitor attractions, bars, restaurants, transport providers etc.

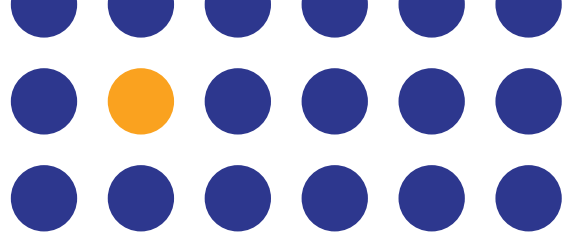
This in turn indirectly supports wages within these businesses and induces secondary spending within the local economy. Where necessary, these benefits will need to be succinctly communicated to relevant community groups to garner support for future development and to stimulate investor interest (e.g., in the form of a hotel investment prospectus).

The case for branded hotels is strong. More than 60% of Australian hotels and 70% of rooms in urban centres are branded. Offering a clearly defined brand promise and delivering a great guest experience drives customer loyalty and value for owners.

Importantly, it is not the intent that introducing new accommodation will compete with existing operators. Feedback indicates that there are many periods throughout the year where the region suffers from economic leakage to other cities/regions because of a lack of accommodation capacity. By increasing the capacity of room stock and introducing new forms of accommodation, it is considered that new markets may be attracted to stay in the region that may have previously stayed elsewhere.

From an economic perspective, investment in the development of eight (8) new-build internationally branded hotels in Moreton Bay has the potential to generate \$146.5 million in direct, indirect and consumption spending, support 953 jobs and create 757 new jobs.





The specific short-term (branded) hotel opportunities identified include:

	Descriptor and opportunity
Short-term By 2026	<p>In the short-term (by 2026) there is a clear market opportunity for the development of up to four (4) new-build internationally branded hotels, in locations such as North Lakes (180-rooms), The Mill (200-rooms), Redcliffe (225-rooms) and South Pines Sports Complex (180-rooms).</p> <p>It is important these facilities cater to the mid-week corporate and MICE market, events, festivals and visiting sports teams.</p>
Medium-term By 2029	<p>In the medium-term (by 2029) there will be sufficient demand for the development of an additional 200-room internationally branded hotel at The Mill.</p>
Games ready by 2031	<p>In the long-term (by 2031) there will be enough demand for the development of an additional 250-room internationally branded conference/convention-oriented hotel at Redcliffe or a smaller hotel in Redcliffe (with approximately 150 rooms) and a 100-room hotel in Caboolture.</p> <p>In addition, although not included within the future projections of room nights in the Region, is the opportunity for the development of two upper upscale or luxury boutique properties (one in the Hinterland and one on Bribie Island) of 20-40 suites as well as other family and group-oriented accommodation close to major sporting and entertainment venues.</p>

5.4 Supporting the growth of new tourism products

There is an important role for Council to support and attract new investment to the region to increase the accommodation and room stock within the region as well as support new and expanding tourism attractions and experiences.

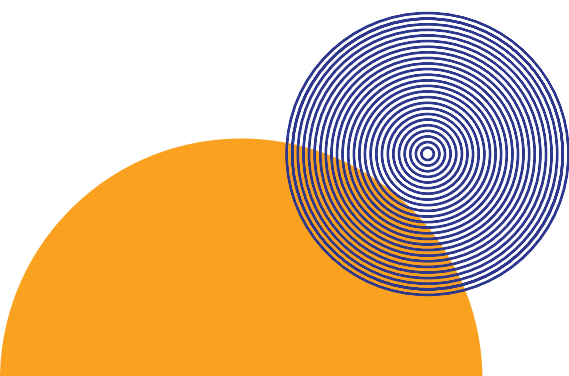
Master planning opportunities exist where a material change can be made to the tourism and major events product mix. There are several significant opportunities within the region to catalyse tourism investment from Scarborough Harbour and the Redcliffe Jetty which present unique government-owned opportunities; to other strategic land parcels and opportunities.

Council's REDS has made investment attraction a key priority and ensuring that regulatory barriers are reduced, and the development process streamlined will be a priority action of the TOP to help facilitate project outcomes. Council is investigating a range of policies and attractors that will better support the development of tourism product in Moreton Bay (especially the hinterland) and will also undertake advocacy activities with other levels of government to secure support and funding as required for projects.



6 Action plan 2022 - 2027

Action	Target deliverable
1. Geographic & time-based dispersal	
1.1 Invest in securing and elevating low-season signature events, festivals and elite sporting content	<ul style="list-style-type: none"> • 10 sponsored events/yr • \$5 m additional economic activity/yr
1.2 Invest in supporting the development of innovative products and experiences that diversify the timing and location of tourism demand across the region	<ul style="list-style-type: none"> • 3 operators of new/expanded experiences assisted in non-hot-spot areas/yr • 5% uplift in visitor numbers in non-hot-spot areas/yr
1.3 Support the adoption of smart technologies that assist with congestion management	<ul style="list-style-type: none"> • Min 1 product trial/yr • Positive change in resident/visitor perception
1.4 Review the effectiveness of road-based signage and wayfinding	<ul style="list-style-type: none"> • Review completed in 2022/23 • Response plan developed in 2023/24 • and implementation commenced
1.5 Unlock opportunities in the region's natural assets for Traditional Custodians to deliver First Nations cultural tourism experiences	<ul style="list-style-type: none"> • Determination of interest and priorities by Traditional Owners • Support applications for the Federal Indigenous Tourism Fund
1.6 Invest in the promotion of clusters of existing small-scale accommodation (such as winery stays and farm stays).	<ul style="list-style-type: none"> • Relevant content featured at least once per quarter in major destination campaigns
1.7 Work towards achieving globally recognised sustainable tourism certification through EarthCheck's Sustainable Destination Standard Program	<ul style="list-style-type: none"> • Silver certification is achieved by June 2024





Action	Target deliverable
2. Conversion of day trips to overnight	
2.1 Undertake a study on growing the high-yield overnight drive market and implement recommendations	<ul style="list-style-type: none"> • Study completed and implementation commenced in 2022/23
2.2 Invest in promotional campaigns that leverage and grow the night-time economy	<ul style="list-style-type: none"> • Relevant content featured at least once per quarter in major destination campaigns
2.3 Develop a tourism investment prospectus to secure new accommodation development and attractions in the region	<ul style="list-style-type: none"> • Prospectus to be released in 2022/23 • Min 3 qualified leads for new accommodation developments/ yr
2.5 Investigate and mitigate regulatory barriers preventing existing or new operators from offering new experiences or entering the market	<ul style="list-style-type: none"> • Systemic issues identified and best practice examples identified • Issues feed into MBRC Local Laws and Planning Scheme reviews and updated policies
2.6 Invest in the activations of major events and tourism precincts that extend event programs in the evenings.	<ul style="list-style-type: none"> • One or more ancillary activities occur for a minimum of 30% of all sponsored major events/yr

Action	Target deliverable
3. Product quality & accessibility	
3.1 Invest in programs that meet the skills development needs and interests of existing tourism operators	<ul style="list-style-type: none"> Industry engagement and satisfaction testing was undertaken under the Tourism Services contract. Min 6 relevant industry development opportunities delivered/yr
3.2 Invest in enhanced marketing efforts for existing accessible tourism activities, experiences and infrastructure	<ul style="list-style-type: none"> Min of 1 accessible product or experience featured in every major destination campaign
3.3 Identify and pursue grant funding opportunities to facilitate accessible upgrades/infrastructure	<ul style="list-style-type: none"> Min 5% annual increase in the number of attractions and/or accommodations that are accessible
3.4 Advocate for greater investment in accessibility upgrades in National Parks	<ul style="list-style-type: none"> Engagement occurs with state counterparts and opportunities receive due consideration
3.5 Invest in support for tourism operators that wish to enhance the accessibility of their tourism offering	<ul style="list-style-type: none"> All operators seeking to improve accessibility are linked to supports
3.6 Connect innovative enterprises in the region with tourism operators to accelerate innovation that could deliver more immersive experiences.	<ul style="list-style-type: none"> Tourism operators are connected to entrepreneurial events and networks in the region
4. Connecting to new markets	
4.1 Invest in a brand and positioning refresh for the Moreton Bay Tourism Region	<ul style="list-style-type: none"> Refreshed tourism brand launched in 2022/23
4.2 Build an enhanced awareness of the needs and wants of existing and emerging visitor market segments	<ul style="list-style-type: none"> Industry awareness programs and resources rolled out to a min of 300 tourism operators every year
4.3 Conduct industry 'famils' for new products that appeal to diverse markets	<ul style="list-style-type: none"> Min 4 industry famils of new products or for new target markets conducted each year
4.4 Support the development of products and promotions that appeal to the mid-week corporate, MICE and sports group visitor segments	<ul style="list-style-type: none"> Target groups a focus of Council's Sponsorship policy Min annual 3% uplift in business travel
4.5 Invest in marketing campaigns that target emerging new markets	<ul style="list-style-type: none"> Min 10% of marketing activity targets emerging new markets
4.6 Attract investment to expand the region's MICE and professional sporting products, brands and infrastructure	<ul style="list-style-type: none"> Tourism investment prospectus to be released in 2022/23 includes relevant opportunities
4.7 Identify needs and opportunities for/from visitors connected to the 2032 Olympics and Paralympics for effective planning and delivery	<ul style="list-style-type: none"> Work with TEQ and Tourism Australia to conduct needs and expectation analysis and supply chain gaps to service visitors



 MORETONBAY.QLD.GOV.AU

 (07) 3205 0555

 MBRC@MORETONBAY.QLD.GOV.AU

