QUEENSLAND TOURISM ON THE MOVE

An integrated tourism and transport policy

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For further information, please contact:

Russell Goss
Director of Research & Policy
Tourism & Transport Forum Australia
E: rgoss@ttf.org.au

Nicola Edington
Policy Advisor, Transport
Tourism & Transport Forum Australia
E: nedington@ttf.org.au

Tourism & Transport Forum Australia (TTF)
Level 6
7 Macquarie Place
Sydney NSW 2000
T: +61 2 9240 2000
www.ttf.org.au

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INTRODUCTION

The Queensland Government is to be commended for committing to the development of a tourism and transport strategy, with the aim of improving the visitor experience. This was one of TTF's key asks in the lead up to the 2015 State election and we welcome the Government's decision to proceed with the development of a policy. The strategy will be aligned with the DestinationQ partnership between the tourism industry and Government, and will outline priorities to ensure connected, integrated and active destinations.

Tourism depends on accessibility, and good transport systems have never been so vital to the visitor economy. As the tourism sector continues to become a larger contributor to the Australian economy, and Australia strives to enhance tourism business from Asia, transport systems must ensure visitors can move around quickly, cheaply and efficiently. While the visitor market is not the primary target of transport services, the relationship between the visitor economy and passenger transport cannot be underestimated.

Great international cities are known for their urban rail networks and the ease of getting around. The simplicity of European city ticketing is not lost on the thousands of Australian tourists who venture to Germany, France, Denmark or the UK each year. One ticket, valid for several days, can be a great destination marketing tool once access to museums and attractions is integrated into the transport fare. Just as annual passes encourage locals to visit attractions more regularly, so too visitor cards provide an incentive to disperse more widely and visit more attractions than planned. The visitors' experience of the overall public transport network is an important factor contributing to their satisfaction of a destination. Research conducted in Western Australia found that transportation was the second most important, yet the most poorly perceived, in terms of attributes measured.

There are also opportunities to use public transport to drive visitation outside of Brisbane and into regional Queensland. Visitors from countries like Hong Kong, Singapore and the UK live in cities better connected than Brisbane and so instinctively turn to buses, ferries and trains to get around. With the right products and the right marketing, many more can be encouraged to visit the northern and southern beaches, discover Queensland's hinterland and experience Tropical North Queensland.

Good public transport needs investment. Increased patronage leads to higher fare box recovery, allowing for greater investment, which leads to greater connectivity and improves the quality of life for residents. Well planned public transport systems, with clear signage, simple fares and convenient ticketing, are particularly important to attract visitors, and to ensure they leave with a better impression and recommend the city to their social and professional networks.

A visitor's needs differ from the expectations of the regular commuter who is primarily concerned about travel times, reliability and safety. Visitors often do not know how much their commute will cost, where the bus or train stop is and how to keep updated on service disruption. A visitor requires more assistance to plan and complete their journey. Visitors must be able to access public transport networks both within metropolitan areas and between cities and regional areas.

Unleashing the potential of tourism and transport requires a whole of Government approach. Queensland needs a strategy that brings the visitor to the heart of transport planning. The Queensland Government needs to consider both the benefits better integration would bring in revenue terms and also the requirements of the millions of domestic and international tourists who visit the State each year.

TTF has developed a sound understanding of both industries and has compiled in this report a number of recommendations to the Queensland Government for inclusion in a future policy. These recommendations aim to improve the visitors' experience in Queensland and will require better coordination between Government agencies.

SUMMARY OF RECOMMENDATIONS

Cementing a tourism and transport policy

Implement a review mechanism

- The tourism and transport policy should be reviewed every three years to ensure the policy achieves its outcomes.
- The Queensland Government should publish detailed data to track transport movements of travellers in order to better understand the origins and travel patterns of visitors.

Extending the reach of visitors

Improving visitor infrastructure

Brisbane – Cross River Rail

- Ensure the project remains a priority and reinstate the ready-to-proceed status of the project.
- Secure Federal funding for the project.
- Construct an underground station at George Street as part of the Cross River Rail to allow both tourists and residents to access Queen's Wharf.

Brisbane – Airtrain services to Brisbane Airport

- Improve the frequency and lower the cost of Airtrain services.
- Once the contract expires, ensure Government resumes control of the service.

Brisbane – Improving cruise facilities in Brisbane

- Plan for new cruise ship facilities in Brisbane that will meet future demands for the sector.

Brisbane – Enhancing ferry connections

- Explore options to enhance ferry connections on the Brisbane River, including the expansion of ferry connections from Brisbane City to Toondah Harbour.

Brisbane – Brisbane Transit Centre

- Redevelop the Brisbane Transit Centre on Roma Street

Gold Coast – Improving rail access

- Commit to extending the light rail line to Gold Coast Airport in the medium term.
- Increase frequency of heavy rail services to the Gold Coast to coordinate with light rail.
- Ensure construction timeframes for the duplication of heavy rail tracks between Coomera and Helensvale are maintained.
- Consolidate the G:link fare zones to create a simple structure that can be more easily understood by visitors.

Gold Coast – Cruise facilities on the Gold Coast

- Develop a sustainable plan for a stopover cruise ship terminal on the Gold Coast.

Sunshine Coast – Develop a multimodal public transport strategy

- Duplicate the Beerburrum-Nambour heavy rail line to improve passenger and freight capacity.
- Work with Sunshine Coast Council to develop a multimodal transport strategy that integrates light rail, heavy rail and buses.

Regional Queensland – Cruise shipping

- Introduce cruise key performance indicators for regional tourism organisations.

Regional Queensland – Drivability of the regional road network

- Maintain long-term funding for roads.
- Ensure that the construction timeframes and commitment to fund 20 per cent of the Bruce Highway, the Cunningham Highway, the Warrego Highway, the Gateway North and the Toowoomba bypass projects are maintained.

Regional Queensland – Access to nature-based tourism experiences

- Improve tourist signage on roads in and out of national parks.
- Continue the roll-out of iBeacon technology at all national parks and tourist destinations.
- Develop a framework to allow for greater access and commercial sustainability while at the same time supporting conservation.

Improving the visitors' journey

Visitor-friendly ticketing

Enhance the *seeQ* and *go explore* cards

- Lower the cost of a *seeQ* card by providing an alternative card that does not include a return Airtrain ticket.
- Develop a *seeQ* plus and *go explore* plus card that offers visitors the option of access to a range of attractions.

- Provide for the *go explore* card to be purchased from fare machines at major tram and bus stops.
- Implement account-based ticketing to allow the use of contactless bank cards and mobile phones as a smart ticket.
- Include multilingual options in go card top-up machines to reflect the diverse origins of visitors to Queensland.

Better transport support for major events
- Work with organisers of the Ekka Royal Queensland Show to offer integrated ticketing.
- Promote the implementation of integrated ticketing for other major events and venues not currently offering it.
- Extend integrated ticketing to major attractions around South East Queensland such as the theme parks on the Gold Coast and the galleries at Brisbane's Cultural Centre.

Transport ticketing for international conventions and exhibitions
- Continue to market the *go access* Corporate Events card to ensure it is available for delegates at all major international conventions and exhibitions.

Private sector involvement

Engage the private sector to deliver public transport services
- Explore opportunities to franchise Brisbane Transport.
- Reform existing private contracts to ensure they are subject to periodic competition.

Access to information

Enhance the 'This is Queensland' tourism application
- Integrate a journey planner feature into the app.
- The journey planner on TransLink's website should be available in several languages.
- Work with hotels and visitor attractions to include the trip planner tool on their websites.

Destination promotion on public transport
- Brisbane Marketing and Gold Cost Tourism should be resourced to continue the roll out of attraction and destination advertising at stations.
- Expand tourism promotion on-board buses, trains and ferries.

Multilingual wayfinding information
- Introduce multilingual messaging on signs located in Cairns CBD and visitor precincts.
- Use new technologies, including augmented reality, to enhance information delivery at tourist destinations.

Improve coordination with other transport providers

Harmonise car rental regulation
- Work with the Federal Government to harmonise the tax and regulation framework applying to the car rental industry across Australia.

The sharing economy
- Develop a ridesharing framework that is responsive, flexible and does not stifle innovation.
- Review visitor accommodation regulation to ensure a more competitive environment for all tourism business operations and investment.

1.   THE NEED FOR A TOURISM AND TRANSPORT POLICY

1.1.   THE VALUE OF THE VISITOR ECONOMY

1.1.1.   Tourism, a pillar of the Australian economy

Tourism continues to emerge as one of the foundations of Australia's future prosperity. It is one of Australia's five super growth industries capable of collectively delivering an additional $250 billion over the next 20 years.[1]
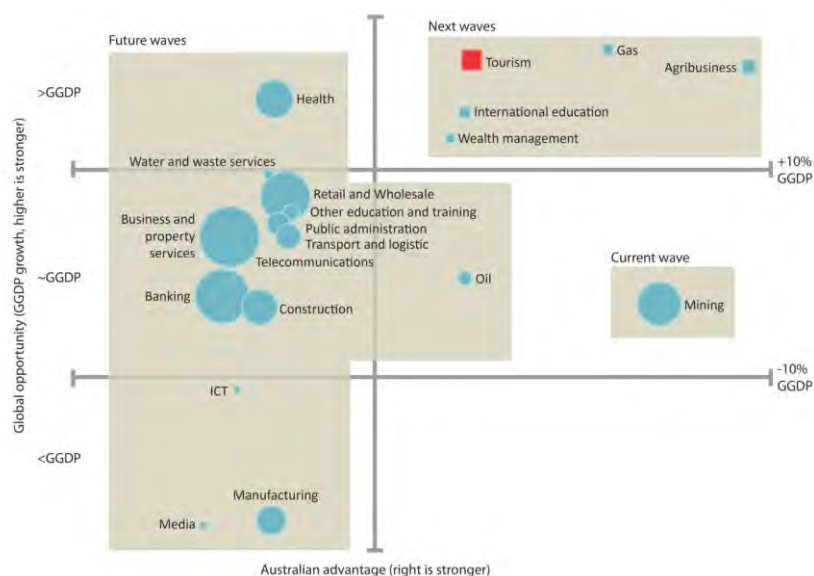
Results from the International Visitor Survey for the year ending December 2015 conducted for Tourism Research Australia show international visitor arrivals to Australia increased 7.9 per cent to 6.9 million, while trip spend increased 17.7 per cent to $36.6 billion.[2] These are encouraging results given low global economic growth.

Australian tourism offers high-employment opportunities, a rapidly expanding customer base and a strong competitive advantage. Tourism is Australia's largest service export,

and it is now expected to overtake coal as Australia's second biggest export behind iron ore. Tourism employs almost twice as many people as the mining industry, and generates expenditure in excess of $100 billion every year – more than all Australian primary industries combined.

There is still significant room for growth in tourism. The Federal Government, along with all States and Territories, has endorsed an aggressive tourism target as part of the Tourism 2020 strategy. Strong growth in Asian visitor spending, the fastest growing segment of Australia's visitor economy, underpins the target of doubling nominal overnight visitor spending from $70 billion in 2009 to $115-140 billion by 2020.

Figure 1: Australia current, next and future waves of growth

Source: Deloitte Access Economics

[1] *Positioning for Prosperity, Catching the next wave* – Deloitte, 2013.
[2] Tourism Research Australia (2015), International Visitor Survey results for the year ending December 2015.

## 1.1.2. The contribution of the visitor economy in Queensland

Queensland is one of Australia's most popular destinations, attracting visitors from around the world to iconic regions such as Brisbane, the Great Barrier Reef, the Gold Coast, Sunshine Coast, the Fraser Coast, the Outback and the Whitsundays.

Queensland is a popular destination for visitors in both traditional and growing markets. The State has the third highest visitor expenditure, behind New South Wales (NSW) and Victoria. Domestic and international visitors support 230,000 jobs across the State[3], and domestic visitors spent $14.5 million in Queensland in the year ending December 2015. Expenditure by international visitors increased 18.8 per cent to $4.9 billion in the year ended December

2015. Despite this, Queensland's performance has slipped behind that of other States – falling from the second most popular State for international visitors in 2014 to the third most popular in 2015.[4]

Tourism employment extends far beyond travel agents and those who work in hotels. It includes chefs and cooks, transport workers from pilots to taxi drivers, tour guides and those who provide services to visitors across the State's cultural, attraction and entertainment offerings and in our retail stores. There were 51,363 tourism businesses in Queensland as at June 2013, representing more than 12 per cent of all businesses in Queensland.[5]

Figure 2: International visitor numbers and spend by State
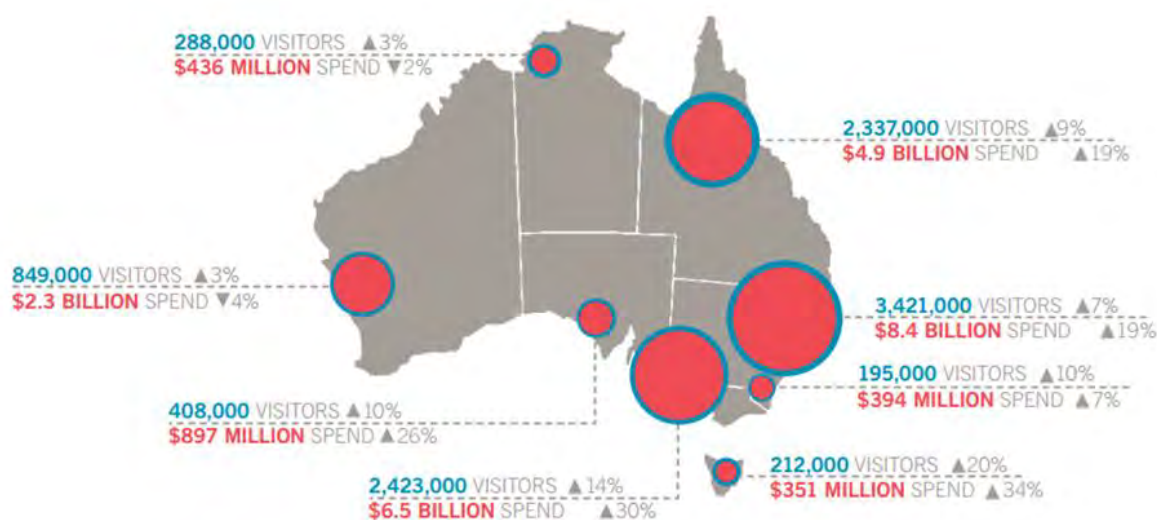
Source: Tourism Research Australia (2015), International Visitor Survey results for the year ending December 2015

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[3] Tourism Research Australia (2015), National Visitor Survey results for the year ending December 2015.
[4] Tourism Research Australia (2015), International Visitor Survey results for the year ending December 2015.
[5] Tourism Research Australia, Tourism Businesses in Australia Appendix A 2012/13.

Tourism is a critical economic driver for the State, generating $23.4 billion in overall expenditure. Tourism contributed $22.6 billion in gross state product (GSP) in 2013-14, including $10.7 billion in direct GSP and another $11.8 billion in flow-on indirect GSP, accounting for 7.6 per cent of Queensland's GSP.[6]

In the 2014 edition of TTF's *Queensland Tourism Business Count & Employment Atlas,* TTF analysed data from the Australian Bureau of Statistics and Tourism Research Australia to provide estimates on the tourism industry's contribution to employment for each of Queensland's 89 Legislative Assembly seats. While almost 60% of Queensland's tourism jobs are in the Brisbane and Gold Coast metropolitan areas, the importance of Government support to regional areas should not be underestimated. Among the eight electorates where tourism employment represents a greater than average proportion of total employment, three are on the Gold Coast, two on the Sunshine Coast and three in Tropical North Queensland. Tourism has far-reaching impacts across the entire State of Queensland, with Tropical North Queensland, for example, experiencing growth in visitor expenditure of 10.6 per cent as a result of expanding Chinese, American and Japanese markets.[7]

Due to the region's large and diverse economy, Brisbane is relatively less reliant on the tourism industry than regional Queensland, with tourism directly representing 2.4 per cent of Brisbane's gross regional product (GRP) compared with 4.9 per cent for regional Queensland. However, Brisbane's total value of tourism is the highest in the State, supplying approximately 35 per cent of the State-wide contribution of tourism.[8] Brisbane's visitor economy is growing, particularly in key segments including leisure and events travel, and Asian tourism. The number of international visitors to Brisbane increased by 12.9 per cent, largely driven by growth from China, New Zealand, the United States and India.[9] International visitors are spending more and staying longer in Brisbane, resulting in a 28.4 per cent increase in international overnight visitor expenditure.[10]

Figure 3: Queensland electorates with the highest intensity of tourism employment

Rank	Electorate	Tourism employment	% of total employment
1	Cairns	3600	13.8
2	Surfers Paradise	3200	12.7
3	Barron River	3500	12.2
4	Noosa	2200	11.1
5	Cook	2200	11
6	Mermaid Beach	2600	10.7
7	Southport	2600	10
8	Maroochydore	2200	6.9
QLD total		**140100**	**6.9**

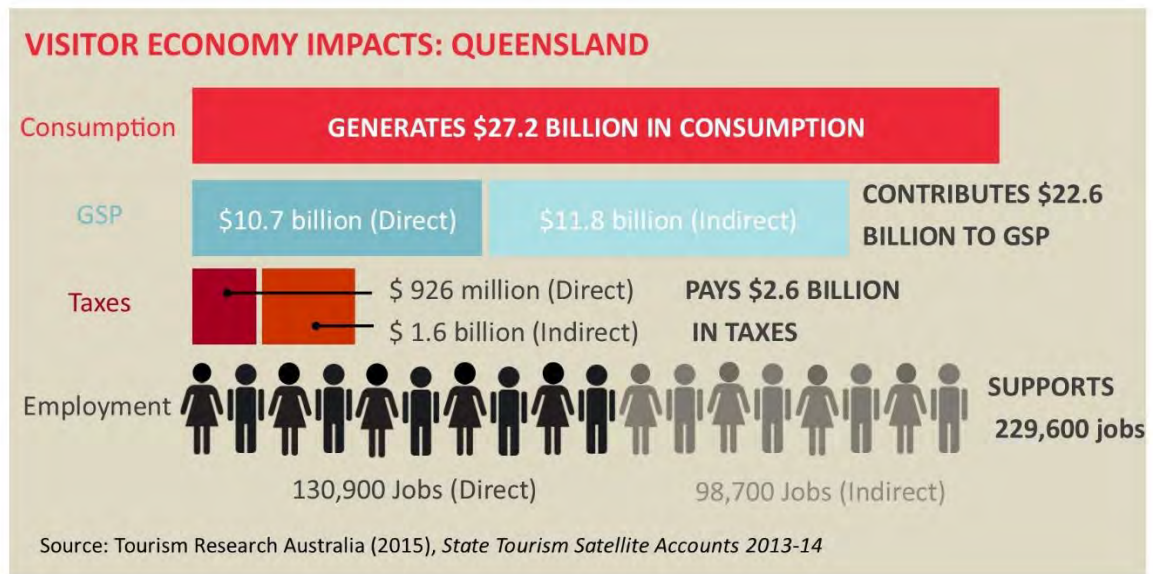[6] Tourism Research Australia - State Tourism Satellite Accounts 2013-14.

[7] Tourism Research Australia (2015), International Visitor Survey results for the year ending December 2015.

[8] Tourism Research Australia - Tourism Satellite Account Brisbane 2013-14.

[9] Tourism Research Australia (2015), International Visitor Survey results for the year ending December 2015.

[10] Ibid.

Figure 4: Impact of the visitor economy in Queensland

VISITOR ECONOMY IMPACTS: QUEENSLAND

Consumption	**GENERATES $27.2 BILLION IN CONSUMPTION**
GSP	$10.7 billion (Direct) $11.8 billion (Indirect) **CONTRIBUTES $22.6 BILLION TO GSP**
Taxes	$ 926 million (Direct) / $ 1.6 billion (Indirect) **PAYS $2.6 BILLION IN TAXES**
Employment	130,900 Jobs (Direct) 98,700 Jobs (Indirect) **SUPPORTS 229,600 jobs**

Source: Tourism Research Australia (2015), *State Tourism Satellite Accounts 2013-14*

1.2. WHAT WILL IT TAKE TO REACH THE QLD 2020 TOURISM TARGET

### 1.2.1. Reaching Queensland's 2020 tourism target

The Queensland Government understands the important of tourism to its economy and has set a similar target to the one set by the Australian Government in 2009. Queensland aims to double its overnight expenditure to $30 billion by 2020 - $11.74 billion above December 2015 expenditure levels. TTF commends the Queensland Government for continuing the DestinationQ partnership between the tourism industry and government, underpinned by a long term plan for the future, Destination Success.

Queensland is third in terms of international visitor numbers behind NSW and Victoria. While Queensland has increased its focus on the sector, it has underperformed against the national average of the growth rate in visitors, with the State having a 3.9 per cent annual growth rate in international visitors from 2011-2015 compared to NSW and Victoria at 8.4 per cent and 8.2 per cent respectively. However, Queensland's share of domestic visitors has increased relative to NSW, with the State recording an increase of 5.7 per cent compared with NSW's 2.3 per cent growth in 2014-15. Moreover, Queensland is second behind NSW in terms of domestic visitor expenditure, with domestic visitors spending roughly $14.5 billion in Queensland and $16 billion in NSW.[11] In order for Queensland to remain internationally competitive, additional support from Government across a range of areas will be required.

[11] Tourism Research Australia, year ending December 2015.
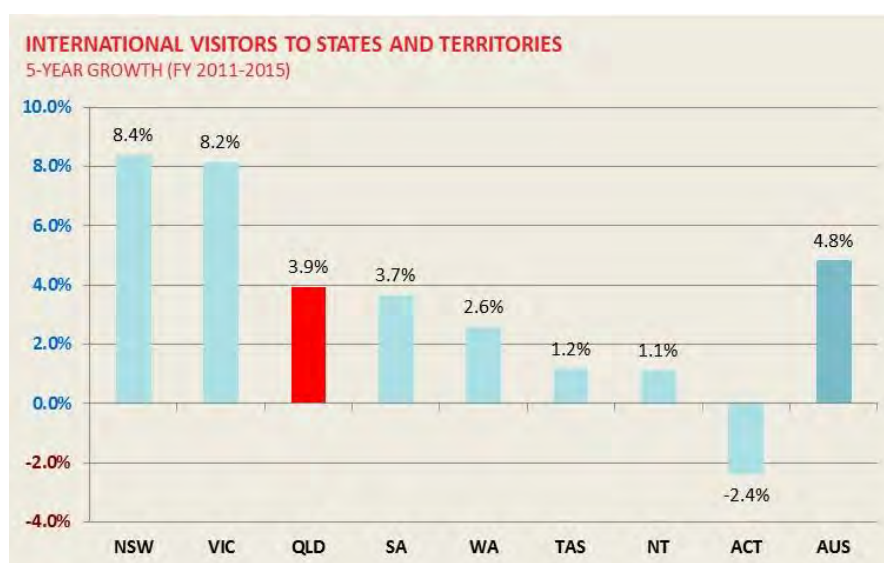
Figure 5: Queensland overnight visitor expenditure ($ billions)
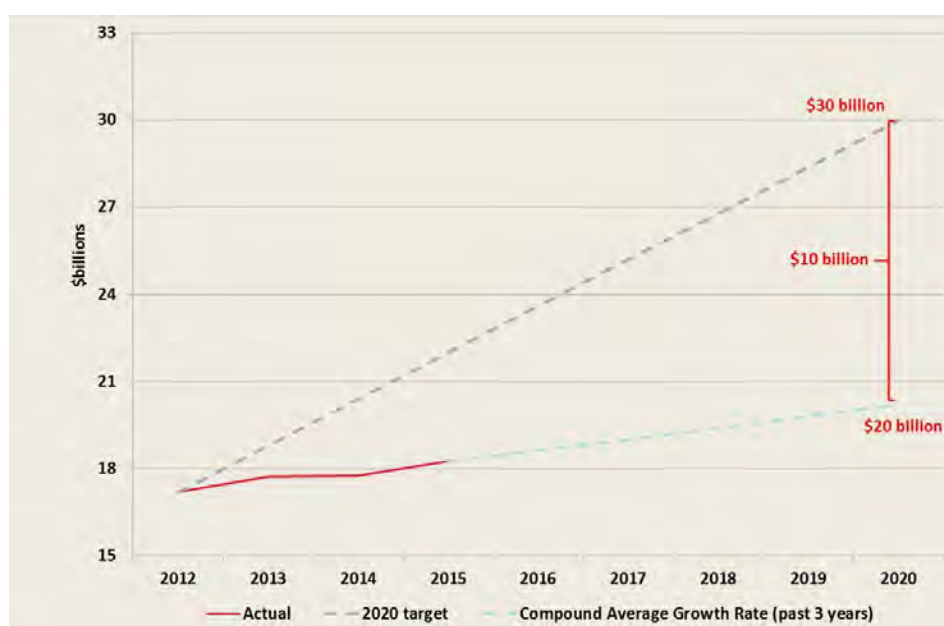
Source: Tourism Research Australia (2015), International and National Visitor Survey results to June quarter 2015

Figure 6: International visitors to States and Territories

Source: Tourism Research Australia (2015), International and National Visitor Survey results to June quarter 2015

1.2.2. The need for a whole-of-government approach

TTF commends the Queensland Government for commencing a review to develop an integrated tourism and transport strategy.

By its very nature, tourism supports a wide range of businesses and industries. Destination Success' 20-year plan for Queensland tourism identifies a number of actions required to reach the target of doubling overnight visitor expenditure by 2020. These range from building stronger partnerships between industry and Government, enabling better access to national parks, maximising cultural and indigenous tourism experiences, integrating technological innovations across all tourism businesses, growing the value of the domestic market, and delivering a sustainable multimodal transport system that provides access to destinations and experiences.[12]

Such a diverse set of actions needs a whole of government approach. While the relationship between different portfolios and tourism have built up over time, other strategies can be developed to improve the visitor's experience and promote Queensland as a visitor-friendly destination.

The 20-year plan acknowledges the importance of well-planned, timely public and private infrastructure to enable tourism growth and visitor access. Members of the industry were surveyed about the importance of the vision's plan to the future success of tourism in Queensland and rated investment in infrastructure as extremely important.[13] The report focuses on how easily visitors can get to and around Queensland destinations, and the impact this has on visitor dispersal. The recommendations in this area require significant action from the transport department and will require a greater collaboration between transport authorities, tourism agencies and the private sector.

1.3. THE RELATIONSHIP BETWEEN TOURISM AND TRANSPORT

1.3.1. The role of transport in destination management

Tourism's very existence depends on accessibility. This concept is widely accepted when focusing on air and cruise travel to a destination, but the role of transport networks and services within a destination are often less considered. The visitor market is not the primary target of public transport services which largely focus on the local commuter task. However, the relationship between the visitor economy and passenger transport cannot be underestimated.

With the exception of those using the car rental sector, international tourists and business travellers frequently do not have access to personal vehicles when visiting Australia. Public transport, taxis, coach services and ride sharing services remain the primary mode of transport for visitors within major metropolitan areas. Public transport, taxi services and ride sharing services are also vital for a thriving night-time economy, and not only provide convenient transport for visitors but also for local businesses and residents after-

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[12] *Destination success: The 20-year plan for Queensland tourism,* January 2014.
[13] Ibid.

hours. Transport services and their legibility have an impact on the experience of the visitor and the appeal of a destination, starting with arrival at Australian international airports and sea ports.

Understanding the local public transport network is the most significant challenge for visitors. The fare structure and ticketing system can be confusing, information difficult to access, and wayfinding systems inadequate. Unfortunately, because the majority of regular public transport users know how to travel on the network, the needs of visitors are often not a focus for Governments and transport departments. In order to improve the visitor's stay and increase the customer's destination

satisfaction, specific attention needs to be given to the needs of visitors.

1.3.2. The role of transport in destination development and regional dispersal

The Tourism 2020 target is to double visitor expenditure. A key part of achieving this ambitious target is to encourage visitors to stay longer and travel to regional areas within Queensland. Dispersal is the extent to which growth in visitor numbers and expenditure are shared across the State. Queensland does not have a shortage of tourism products. From Brisbane to the Gold Coast, Sunshine Coast, Cairns, the Great Barrier Reef and the Outback, there are destinations that offer visitors an unforgettable experience.

Given the vastness of the State and the distances between regional destinations, the diversity of tourism experiences is critical to both the tourism industry and to the economic and social development of the regions. The challenge is to make these destinations easily accessible. The concept of better accessibility leading to more visitor expenditure can be tested on two different scales, within

metropolitan areas and between cities and regional areas.

In urban areas, the ease of access to local visitor attractions across the metropolitan area, primarily via passenger transport including bus, rail and taxis, is essential to promoting the city as a holistic destination and broadening the tourism offer. Good transport links enable visitors staying in a CBD hotel to do day trips to Lone Pine, the Gold Coast and Sunshine Coast hinterland and beaches, and other natural, cultural and culinary attractions.

Brisbane's public transport links are also critical to the promotion of major events. In 2014-15, numerous events were held across Queensland, including the Brisbane G20 Leaders' Summit, and Tourism and Events Queensland's (TEQ) major event portfolio attracted more than 216,000 visitors and $350 million in direct and incremental visitor spending to the State. [14] Visitors coming to

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[14] *Tourism and Events Queensland Annual Report*, 2014 – 2015.

Australia to attend an event provide the opportunity to showcase Australia to the world. Queensland will also host the Gold Coast 2018 Commonwealth Games and it is the first time a regional city in Australia has hosted the Games. More than $13.5 billion of major infrastructure projects are planned or currently underway to change the face of the city for an event that is expected to attract more than 100,000 domestic and international visitors to the city and will see more than 6,500 athletes and officials participate. The Games will showcase Queensland as one of Australia's premier tourism destinations. Queensland's transport services will also be on show. The Games' sporting events will be held at various locations around the Gold Coast and Brisbane so it is important visitors can easily access venues and accommodation. Making sure the public transport network adequately responds to the increase in travel demand is a prerequisite to the success of events like the Commonwealth Games.

Visitors from traditional markets such as New Zealand, North America or Europe tend to visit regional areas whereas visitors from the fastest growing markets in Asia tend to limit their visits to cities, although their pattern is changing.

Tropical North Queensland continues to record strong growth from China, America and India, with visitation increasing 10.9 per cent, 16.6 per cent and 57.4 per cent respectively in the year ending December 2015.[15] China is Tropical North Queensland's largest visitor market, with 174,000 people visiting the region in the year ending December 2015. Since 2012, China Eastern Airlines has operated seasonal flights between Shanghai and Cairns. Tropical North Queensland significantly benefits from Chinese New Year travellers with daily services from

China available for the four weeks of the Chinese New Year month, and from February to April, direct services will operate three times a week. Transport links between metropolitan and regional areas, however, facilitate the dispersal of visitors on a larger scale. Regional Tourism has great potential in Queensland which is home to spectacular natural landscapes, rich indigenous history and culture, major music festivals and internationally recognised food and wine products. Approximately 58 per cent of tourism businesses are in regional areas.[16] Improving access from Brisbane to regional Queensland is a key element in developing regional tourism.

Whether it is via air services to regional airports, rental vehicles, coaches or public transport, all transport modes have a role to play in connecting visitors to regional Queensland.

Figure 7: International and domestic visitor nights by destination
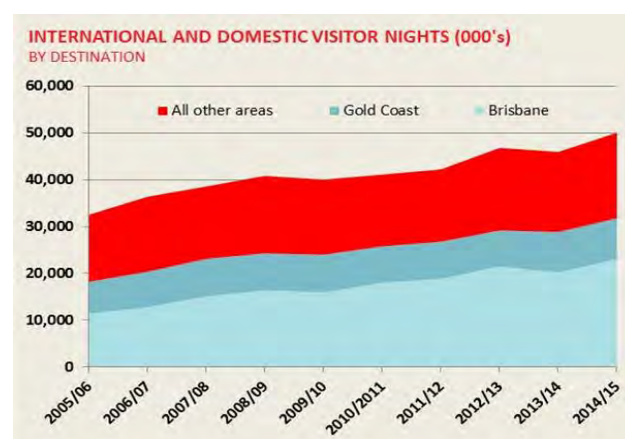
Investment in regional transport infrastructure should be a priority for the Queensland Government, along with key initiatives including innovative marketing campaigns, regulatory changes and improved customer service.

[15] Tourism Research Australia, year ending December 2015.
[16] Tourism and Events Queensland – Tourism Economic Key Facts, July 2015.

1.3.3. The value of the visitor market in public transport

While public transport authorities predictably focus on the commuter task, the share of visitors in total public transport patronage can be undervalued. Queensland welcomes more than 20 million domestic and international overnight visitors each year. The average length of stay of these visitors was respectively 3.7 nights for domestic travellers and 22.7 nights for international visitors.[17]

International visitors do not have access to their personal vehicle and although some visitors are likely to rent a car for their stay in Queensland, the majority rely on public transport and taxi services. Despite the significant task of moving visitors, there is little data available about visitors' journeys on public transport in Brisbane and Queensland. Failing to understand and service this market is not only detrimental to the visitor's experience and the visitor economy but is also a missed opportunity for public transport authorities.

The visitor market plays an important role in the viability of some public transport services in Brisbane and Queensland. Gold Coast's light rail, G:link, has been a notable success with figures showing 6.18 million trips were made on the $1.2 billion light rail system in its first year of operation. On the opening day of G:link, TransLink launched a dedicated tourist card, *go explore*. The card allows tourists to purchase unlimited travel on the light rail network and Gold Coast bus services. While specific analysis is not available, it can be argued that such high passenger numbers would be to some extent attributable to the availability of a tourist smart-card.

Ferry services on the Brisbane River are supported by both visitors and commuters. The free cross-river CityHopper service alone

accounted for approximately 31 per cent of passenger journeys on the ferry network. This service, assisted by the visitor market, has sparked an increase in the number of passengers on Brisbane City Council's ferry services, the CityCat and CityFerry. Without the visitor market, the Government would not be able to provide the same level of service while maintaining its current cost recovery.

On the rail network, visitors contribute to the patronage of the airport line which, as a suburban rail line, also services local residents and on regional rail services. This additional demand from the visitor market on the public transport network is often not directly competing with local demand as the times of travel are frequently different. The bulk of the commuter transport demand is during morning and afternoon peak hour (7.30-8.30am and 4.30-6pm), when the public transport network has limited spare capacity. Conversely, visitors' travel demand is spread throughout the day, including on weekends, when the network is under-utilised. There is an opportunity to make sure the transport network is attractive to visitors in order to increase off-peak patronage and increase public transport service cost recovery. Improvements in visitor's customer service will ultimately benefit local public transport passengers. If the information, ticketing and interchange facilities work for a first-time, non-English speaking visitor with small children and luggage, it will work for everyone.

Additionally, the Queensland Government must recognise the need for a truly networked transport system that can deliver visitors throughout the State via different modes of transport, whether that be air, rail, road or marine. One of the challenges for both tourism and transport planners in a State as large as Queensland, with a somewhat decentralised

[17] Tourism Research Australia, year ending December 2015.

population, is the demand for access modes which may not be sustainable or viable for smaller populations. As such, it is important that Government at all levels understand the origins and travel patterns of both domestic and international visitors to better plan for transport needs. In order to achieve this, the Government should explore publishing more detailed official data or survey material to track the transport movements of travellers around Australia.

RECOMMENDATION

- The tourism and transport policy should be reviewed every three years to ensure the policy achieves its outcomes.
- The Queensland Government should publish detailed data to track transport movements of both domestic and international travellers in order to better understand the origins and travel patterns of visitors.

2. IMPROVING VISITOR INFRASTRUCTURE

2.1. BRISBANE

2.1.1. Cross River Rail

Brisbane's train network is nearing capacity as it is constrained by only one river crossing to the city. Infrastructure Australia's 2011 Australian Infrastructure Audit report noted the cost of congestion across Brisbane, the Gold Coast and Sunshine Coast could increase from $1.9 billion in 2011 to $9.2 billion in 2031.[18] A second rail crossing is needed to alleviate pressure on existing infrastructure and address rapid population growth, increased road congestion and constrained CBD rail capacity.

TTF commends the Queensland Government for establishing an authority to deliver Cross River Rail. The project includes a 10.2 kilometre link with dual 5.9 kilometre tunnels, connecting Dutton Park in the south to Bowen Hills in the north. Cross River Rail will deliver new stations at five key locations such as Boggo Road, Woolloongabba, Albert Street, Roma Street and Exhibition. Such a link would greatly increase capacity of the city's rail network and would provide the infrastructure to meet future demand.

TTF commends the Queensland Government for identifying Cross River Rail as a priority infrastructure project. The project has also been classified as a high priority project by Infrastructure Australia in their 2016 Australian Infrastructure Plan. The ready-to-proceed status previously applied to the project should be reinstated and TTF urges the Queensland Government to present a business case to Infrastructure Australia immediately. However, such a project would not be feasible without both Federal Government assistance and private sector participation.

Good public transport networks deliver more productive, sustainable and liveable cities. Efficient rail, bus and ferry transport systems also improve access to key activity centres and visitor precincts. In July 2015, The Star Entertainment was announced as the proponent for the Queen's Wharf project in Brisbane, a multi-billion dollar integrated resort development. The development of Queen's Wharf will transform this part of the city into an exciting world-class destination, attracting new investment and an additional 1.39 million visitors per annum to Brisbane and Queensland. Queen's Wharf will change the dynamic of Brisbane's CBD, with 8,000 leisure, entertainment and tourism-related jobs and around 2,000 jobs during construction expected to be created. The project is expected to deliver 2,000 residential apartments and 1,000 hotel rooms.[19] It will also be the hub that connects thousands of Government workers in the Parliamentary Precinct with the Botanic Gardens, Queen Street Mall, South Bank, the Cultural Precinct and the Brisbane River.

For an iconic entertainment precinct of this size, it is critical both tourists and residents can access the Queen's Wharf precinct more easily. According to current plans, the development will only be directly accessible by ferry and pedestrian access from the CBD and Southbank via a proposed bridge. Visitors accessing the development by rail will have to walk over one kilometre or change to a bus from South

[18] Infrastructure Australia, *Australian Infrastructure Audit Report, 2011*.
[19] Destination Brisbane Consortium 2014.

Brisbane or Roma Street train stations. Such an indirect transport connection is not optimal for passengers with luggage.

Consequently, TTF calls for an underground station at George Street as part of the city's second rail crossing to allow both tourists and residents to easily access Queen's Wharf, the CBD and Southbank as well as the airport and suburban rail network. As Queen's Wharf is a major development, TTF encourages the Government to integrate the underground station with the redevelopment to ensure seamless access for visitors to the precinct. The second rail crossing needs to be a priority for the Government to alleviate capacity constraints and serve parts of the city not proximate to existing rail services.

- Ensure the project remains a priority and reinstate the ready-to-proceed status of the project.
- Secure Federal funding for the project.
- Construct an underground station at George Street as part of the Cross River Rail to allow both tourists and residents to access Queen's Wharf.

2.1.2. Airtrain services to Brisbane Airport

Brisbane Airport has been linked to the CBD and the Gold Coast by an airport rail service since 2011. While Airtrain provides a convenient service for tourists and residents, there are two barriers to improving the appeal of Airtrain: the frequency of the service and high fares.

According to Brisbane Airport Corporation, the Airtrain service has an average mode share of around 8 per cent. Private vehicles had the largest mode share at approximately 60 per cent and 72 per cent at domestic and international terminals respectively, followed by taxis, and mini-bus and coaches at approximately 20 per cent and 10 per cent respectively.[20] While Airtrain patronage figures are now on the rise, growing at approximately four per cent per annum, total public transport mode share is low compared to other international airports such as London Heathrow, Paris CDG, Zurich, Copenhagen or Hong Kong (which all have a public transport mode share between 30 and 60 per cent, excluding taxis). In order for Airtrain patronage figures to further increase, the service needs to be more frequent and less costly.

TTF urges the Queensland Government to consider subsidising part of the fare to ensure its fares are in-line with the broader train network.

Airtrain services are managed through the Brisbane Airport Rail Link agreement, a contract between Airtrain and the Queensland Government. The contract is in place until 2036 and includes conditions that restrict introducing Brisbane Transport bus services that would compete with Airtrain services. The contract does not allow bus services to operate within one kilometre of Airtrain stations. With low Airtrain patronage levels and inadequate public bus services to the airport, both tourists and residents often choose to travel to the airport by road by ways of taxi, hire car or private vehicle.

[20] *Brisbane Airport 2014 Master Plan*.
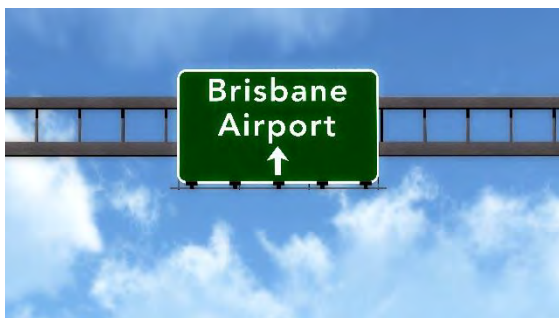
Currently, Airtrain operates 50 services on a weekday between 5:04am and 10:04pm, with services running every 15 minutes during peak periods, and every 30 minutes at off-peak times. On weekends, services run every 30 minutes between 6am and 10pm. In contrast, Sydney Airport is served by a frequent and relatively fast rail link, with the Airport Link service operating every eight minutes in peak periods. The frequency of Airtrain services must be increased to levels similar to Sydney in order to better service visitors and residents.

Additionally, users of the international and domestic stations must pay a fare totalling $17.50 one-way to or from the CBD. Passengers are able to obtain a discount of 88 cents by buying the ticket online and up to

$2.63 when buying the ticket in advance. Two adults travelling together pay a fare of $27 one-way; however, this fare is only available online. Reducing Airtrain fares to bring them in-line with the Brisbane train network is an important initiative for reducing road congestion as well as improving the visitor experience for airport users. It is important to note that reducing the fare would not only support the visitor economy but also the large workforce at Brisbane Airport. Up to 21,000 full-time equivalent jobs are supported by Brisbane Airport, with this figure expected to increase to around 51,000 jobs by 2034.[21] Workers within the Brisbane Airport Precinct, however, can purchase a weekly ticket at a reduced price of $35 that allows for unlimited travel between the airport and Brisbane City stations. In order to deliver efficient and effective transport outcomes for Brisbane Airport, TTF recommends the Government resume control of the airport rail service once Airtrain's contract ends in order to further integrate it with the suburban rail network.

RECOMMENDATION

- Improve the frequency and lower the cost of Airtrain services.
- Once the contract expires, ensure Government resumes control of the service.

2.1.3. Improving cruise facilities in Brisbane

The cruise shipping sector has expanded considerably in Queensland, mirroring its phenomenal growth across Australia. It is a sector delivering benefits to both Brisbane and regional ports, particularly in Far North Queensland. In 2013-14, Queensland ports received 238 cruise ship visits and over 500,000 passenger visit days.[22] TTF is, however,

concerned that future growth of the industry could be impeded by inadequate facilities in Brisbane. TTF welcomes the Queensland Government's announcement of an assessment of a new cruise ship terminal at the mouth of Brisbane River. The existing Portside terminal is limited in its capacity to cater for large cruise ships and overflow facilities at

[21] *Brisbane Airport 2014 Master Plan*.
[22] *Economic Impact Assessment of the Cruise Shipping Industry in Australia, 2013-14,* AEC Group

Fishermen's Island are inadequate, particularly for international guests. TTF urges the Queensland Government to prioritise this plan and continue to work with industry in order to cater for the future demands of the sector.

- Plan for new cruise ship facilities in Brisbane that will meet future demands for the sector.

2.1.4. Enhancing ferry connections

The planned development of the Howard Smith Wharves on the Brisbane River will transform the site into a world-class riverfront destination. The site will be transformed using mixed-use commercial and community facilities and will include a dining, retail and tourism centre, a 5 star boutique hotel, parkland and a 1,500 square metre exhibition space.

This development, along with Queens Wharf, will greatly increase visitor access and activity on and around the Brisbane River. These future developments offer the Government the opportunity to integrate commercial and public transport infrastructure to support more transport services for tourists and commuters. As part of this, the Queensland Government should work with the private sector to explore expanding ferry connections from Brisbane City to Toondah Harbour as a gateway to Moreton Bay and North Stradbroke Island. Currently, visitors travelling to North Stradbroke Island must either drive to Toondah Harbour or catch a train with a journey time of over an hour. Expanding ferry connections from Brisbane to Toondah Harbour would be particularly pertinent given the proposed master plan for the $1.3 billion redevelopment of Toondah Harbour released on 25 November 2015. The redevelopment of the Harbour will provide a new ferry precinct, ticket and tourist office, multi-unit apartments, a public foreshore parkland as well as waterfront retail and commercial space.

- Explore options to enhance ferry connections on the Brisbane River, including the expansion of ferry connections from Brisbane City to Toondah Harbour.

2.1.5. Brisbane Transit Centre

Ensuring that the tourism and transport policy considers the impact of a range of overlapping decisions by various Government agencies, providing whole-of-Government oversight, is particularly important. This includes the redevelopment of Brisbane Transit Centre (BTC) on Roma Street which can have a significant impact on the visitor economy.

BTC provides an all-weather transport interchange where visitors congregate to be picked up by day and overnight bus tour operators as well as express coaches. Roma Street Station is also the terminus station for long distance services travelling between destinations such as Longreach, Townsville and Cairns. BTC is not only the northern entry to the

city, but is also in the heart of one of the city's visitor accommodation precincts.

There is an opportunity for the creative redevelopment of BTC to address the amenity needs of tour and transport operators, and their customers, improving the overall visitor experience. This is particularly important given the accessibility changes that will result from the Cross River Rail project delivering services to Roma Street Station, and the station's redevelopment should coincide with the construction of this vital project. The Queensland Government should look at examples of other transport interchanges, for example Spencer Street in Melbourne and Wellington Street in Perth, as well as consult with industry in considering BTC's redevelopment.

RECOMMENDATION

- Redevelop the Brisbane Transit Centre on Roma Street.

2.2. GOLD COAST

2.2.1. Improving rail access

Stage 1 of the Gold Coast Light Rail has been more successful than expected and has significantly enhanced the visitor experience on the Gold Coast. TTF commends the Federal Government on agreeing to fund Stage 2 of light rail to ensure the project can be completed in time for the Commonwealth Games in 2018. Stage 2 will provide a rail/light rail link between Brisbane and Surfers Paradise and improve travel between the two cities, making it easier for spectators and locals to move around.

In light of this, TTF urges both the Queensland and Federal Governments to make a commitment to extend the light rail line to Gold Coast Airport in the medium term. This would connect the airport and other major activity centres in the south, such as Coolangatta, to the high demand tourist centres in the north.

Additionally, an efficient heavy rail network connecting Brisbane and the Gold Coast must be a priority. Infrastructure Australia found that, in 2011, the Pacific Motorway City to Beenleigh road corridor was at 76 per cent capacity. By 2031, this is expected to increase to 88 per cent. Similarly, the Beenleigh to Helensvale corridor is projected to be at 98 per cent in 2031.[23]

Existing public transport access to the Gold Coast is long and convoluted. Currently, light rail runs between Gold Coast University Hospital and Broadbeach South, stopping at major tourist destinations like Main Beach and Surfers Paradise. For a visitor to travel approximately 80 kilometres from Brisbane CBD to Surfers Paradise the total journey time takes approximately two hours. Visitors must change from heavy rail at Helensvale Station, to a bus, to the light rail at Southport Station. Alternatively, they can board a bus direct from Nerang Station to Surfers Paradise. In peak hour and on weekends, the roads leading to Surfers Paradise become extremely congested. Stage 2 would allow visitors to immediately connect to light rail from the heavy rail line, bypassing road traffic and offering a more enjoyable customer experience and improved urban amenity.

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[23] *Australian Infrastructure Audit Report, 2011,* Infrastructure Australia.

Image courtesy of Keolis Downer

The frequency of heavy rail services to the Gold Coast should be increased to more clearly align with light rail services so that wait times are minimised. The rail service to the Gold Coast leaves approximately every 20 to 30 minutes from Brisbane CBD. On weekends, the Gold Coast line departs every 30 minutes from Brisbane CBD. However, the light rail service runs every eight to 15 minutes during the week and 10 to 15 minutes on weekends. Increased frequency and timetable integration is particularly important in the context of the Commonwealth Games, when unprecedented numbers of tourists will be using the Gold Coast rail line.

TTF commends the Queensland Government for duplicating the heavy rail track between Coomera and Helensvale. This will improve the frequency of trains between the Gold Coast and Brisbane, with capacity increasing significantly. The Queensland Government must ensure that the construction timeframes for this critical project are maintained.

To further enhance the Gold Coast transport network, fare zones must be reviewed. TTF applauds the Government for establishing an expert taskforce to review TransLink's fare structure in South East Queensland. The Fare Review will form the basis of a new fare strategy to increase public transport patronage while ensuring a sustainable fare revenue stream. TTF was represented on the taskforce and recommends the fare zones be restructured to be more intuitive and easy to understand for visitors. The fare zones for G:link currently run over zones 13 and 14 (a two zone fare). Those travelling on the northern half of the network are in zone 13 (Gold Coast University Hospital to Main Beach) and the southern half in zone 14 (Surfers Paradise North to Broadbeach South). This structure can create confusion for visitors and makes it difficult for them to calculate the right fare and ticket. TTF recommends consolidating the zones to create a simple structure that can be more easily understood by visitors.

RECOMMENDATION

- Commit to extending the light rail line to Gold Coast Airport in the medium term.
- Increase frequency of heavy rail services to the Gold Coast to coordinate with light rail.
- Ensure construction timeframes for the duplication of heavy rail tracks between Coomera and Helensvale are maintained.
- Consolidate the G:link fare zones to create a simple structure that can be more easily understood by visitors.

2.2.2. Cruise facilities on the Gold Coast

While Brisbane remains Queensland's cruise gateway and turnaround port for the area, the construction of a cruise terminal on the Gold Coast would bring the benefits of the high-growth sector to one of Queensland's biggest tourist destinations. Without a stopover port catering for transit calls, the Gold Coast is missing out on a vital economic boost to tourism. A sustainable plan for a stopover cruise ship terminal should be developed in conjunction with local authorities and the community.

- Develop a sustainable plan for a stopover cruise ship terminal on the Gold Coast.

2.3. SUNSHINE COAST

2.3.1. Develop a multimodal public transport strategy

The Sunshine Coast is one of Queensland's most rapidly changing regions. Between 2013 and 2031, the Sunshine Coast's population is expected to grow by 51 per cent, from 280,000 residents to 424,000.[24] Sunshine Coast Airport has been experiencing strong demand, with more than 250,000 passengers travelling through the airport in the first quarter of 2015 – a 12 per cent increase on the previous quarter.[25] The region has also seen a 10.6 per cent rise in international overnight visitors together with a 2.8 per cent increase in domestic visitors in 2014-15.[26]

Efficient transport systems need to be developed to cater for such high population growth and visitor numbers. Currently, the Sunshine Coast is serviced by a single heavy rail line from Beerburrum to Nambour. Capacity along this line is severely restricted, resulting in lower speeds and reduced operational efficiencies.[27] TTF commends the Queensland Government for identifying the Beerburrum to Nambour rail upgrade as a priority project. It is vital this project remains a priority and is progressed to ready-to-proceed status. Duplication of the Beerburrum-Nambour section of the track is needed to increase services and support the growing population and visitor economy.

Furthermore, light rail, or comparable investment in the transport network, is needed on the Sunshine Coast to manage the growing congestion. Multimodal transport systems, that is, networks that integrate multiple forms of public transport, offer a high degree of accessibility for both commuters and tourists. Accessibility of public transport is a key factor in determining the attractiveness and liveability of a city. Multimodal transport systems also offer the opportunity to minimise transit time, therefore creating a more enjoyable experience for the commuter or tourist and enhancing their door-to-door experience. London, for example, has a well-established rail network that is complemented by a bus and ferry network. Purpose built bus interchanges have been developed at high-traffic stations to be within walking distance of the railway and underground stations. The physical integration of transport networks needs to be supported by timetable integration.

Timetable integration might include timetabling buses to connect with light rail services, or alternatively, moving to turn up and go services. Improved transport links will be essential in making sure people can move between popular tourist destinations, major centres and employment hubs such as Mooloolaba, Maroochydore, Kawana Town Centre and Caloundra. Transit interchanges in these areas could facilitate interchange between high frequency and priority bus routes, as well as local feeder bus routes. Furthermore, if a proposed Maroochydore heavy rail line is constructed, an integrated transport plan will be needed to facilitate

[24] *Sunshine Coast Light Rail: Shaping Our Future,* Sunshine Coast Council, 2014.
[25] *Sunshine Coast Airport going from strength to strength* – Media release 15/10/15, Sunshine Coast Council.
[26] Tourism Research Australia*,* year ending June 2015.
[27] *Landsborough to Nambour Rail Project Environmental Impact Statement*, Department of Transport and Main Roads, 2009.

passenger movement from the heavy rail line from Brisbane to light rail or buses on the coast.

An effective integrated system can be achieved by offering multimodal contracts, with one operator having operational control of multiple transport modes. Multimodal integration in France has resulted in greater network renewal and increases in patronage. For example, Keolis, one of Europe's leading public transport operators, operates light rail and bus networks in Dijon. In the year after light rail was introduced, Dijon experienced a 20 per cent increase in patronage, and a 10 per cent year on year increase for the following two years.

A light rail system fully integrated with an extensive bus network, as well as the heavy rail network, would greatly enhance regional dispersal and provide for an easy and enjoyable experience for tourists travelling to the Sunshine Coast, and will also increase accessibility for Sunshine Coast residents.TTF recommends the Queensland Government

Image courtesy of Keolis Downer

works with Sunshine Coast Council and private operators to develop a multimodal transport system in conjunction with a light rail system for the region.

RECOMMENDATION

- Duplicate the Beerburrum-Nambour heavy rail line to improve passenger and freight capacity.
- Work with Sunshine Coast Council to develop a multimodal transport strategy that integrates light rail, heavy rail and buses.

Best practice snapshot 1:

TOURS' MULTIMODAL PUBLIC TRANSPORT NETWORK

Keolis, one of the world's leading tram operators, launched light rail in Tours in August 2013. The light rail network operates in conjunction with metropolitan and suburban bus lines and Bus Rapid Transit. The 15 kilometre light rail network was part of an ambitious urban development plan to transform the city. Stations, public spaces, urban amenities and bus services were incorporated into the introduction of light rail, with the aim to provide efficient and effective multimodal integration.

Image courtesy of Keolis Downer

To meet the growing transportation needs of greater Tours, bus and light rail services were integrated with heavy rail, and timetables were adjusted to align with train departures and arrivals. Tours' central station was re-configured to become an important transport interchange, with light rail and three main bus lines intersecting with heavy rail services throughout the day and night. Other stations were optimised to transfer passengers easily from one mode to another, using a dedicated entrance hall to allow passengers to have direct access to the rail platform. Several other heavy rail stations were improved to provide more effective multimodal integration. Seven park-and-ride facilities were created on the CBD's fringe to allow drivers to transfer to light rail or bus, and eight bicycle parks were developed to allow for similar transfers.

In the first year after the complete introduction of the integrated network design, patronage on the public transport network increased by nearly 40 per cent. According to a satisfaction survey in January 2014, 66 per cent of respondents thought that the urban environment was more accessible since the introduction of light rail.

Source: Keolis
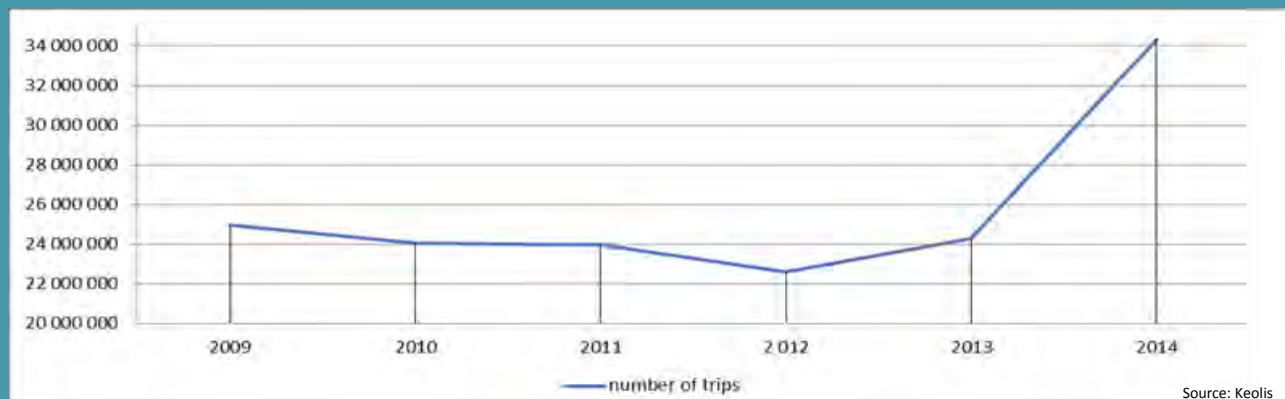
2.4.   REGIONAL QUEENSLAND

2.4.1. Cruise shipping

Regional and Tropical North Queensland boast many unique, natural attractions, including the Great Barrier Reef, Magnetic Island and Townsville's northern beaches. The cruise industry in particular provides a vital economic boost to North Queensland, and in particular, regional towns such as Gladstone. Businesses in those regions have an opportunity to benefit from cruise stopovers as visitors buy local products and services.

The cruise industry is providing, and can continue to provide, a major economic boost to Gladstone, shifting its image from a construction and mining town to a gateway to a Southern Great Barrier Reef experience. TTF recommends the Government consider setting cruise key performance indicators (KPIs) for regional tourism organisations (RTOs) to ensure they maximise benefits from the expanding cruise industry. The KPIs should be specifically tailored for each RTO, and could include, for example, attracting a minimum number of cruise ships to the port.

Furthermore, smaller and expedition cruise shipping is an important and high-value segment of the market. Queensland Government policies should recognise and support this diversity, which ensures that the State can offer domestic and international visitors a full range of product choices. The growth of expedition and smaller cruise ships has the potential to expand the reach of those economy benefits, particularly in regional areas, as such ships visit a wider range of ports than those that are restricted to major ports. TTF encourages the Queensland Government to develop an expedition and adventure cruise shipping strategy to support expedition cruise attraction.

RECOMMENDATION

- Introduce cruise key performance indicators for regional tourism organisations.

2.4.2. Improve the drivability of the regional road network

The drive tourism market is very important for Queensland's tourism industry, accounting for approximately 70 per cent of the overnight leisure market in Queensland.[28] Drive tourism, particularly domestic drive tourism, is important in regional areas, facilitating regional dispersal and access to Queensland's diverse tourism experiences. Businesses in rural and regional communities rely on income from drive visitors who stop and purchase local products and services. Drive tourism is often the only way to get to some Queensland destinations. The introduction of new regional airline routes has seen an increase in fly-drive tourists to the State, with the trend likely to continue.

According to Tourism Research Australia's National and International Visitor Surveys, approximately 32 per cent of all international visitors to Queensland are international overnight drive tourism visitors.[29] Additionally, domestic overnight drive tourism visitors make up approximately 60 per cent of all domestic visitors to Queensland.[30] Of these drive tourists, one-third stay solely within the south-east corner of the State; being the Sunshine Coast, Brisbane and Gold Coast. The drivability of road networks is critical to coach operators, rental vehicles customers and travellers using their private vehicles. Around 80 per cent of

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[28] *Queensland Tourism Drive Strategy 2013-2015*, Queensland Government.
[29] Ibid.
[30] Ibid.

the State's road network is under the jurisdiction of local councils[31], many of which simply do not have the resources to maintain or upgrade vital tourist routes to a satisfactory standard. Commuters and tourists travelling to and from the Sunshine Coast are subject to increasing congestion on the largely two-lane Bruce Highway. A combination of weather impacts, increased traffic volumes and under-investment in maintenance and renewals has resulted in progressive deterioration of conditions on this highway.[32]

Tourism is particularly vulnerable to major disruptions on the road network which can affect visitors' ability to access destinations. Brisbane's 2011 floods emphasised tourism's reliance on the road network and the importance of building more resilient infrastructure. TTF acknowledges the reconstruction and recovery efforts undertaken after these floods, and supports the Federal and Queensland Governments in developing the Bruce Highway Action Plan and funding a study to look at congestion and bottleneck issues along the Bruce Highway to Caloundra. TTF urges the Government to widen the Bruce Highway between Caboolture and Caloundra to reduce congestion and improve the drivability of regional roads.

Upgrading sections of the Bruce Highway, the Cunningham Highway, the Warrego Highway, the Gateway North and the Toowoomba bypass are key elements in increasing access to regional destinations, and are paramount in providing a more enjoyable drive visitor experience. According to the Australian Road Assessment Program's (AusRAP) rating of

Australia's national highways, 29 per cent of roads surveyed in Queensland are rated as 2-star, 63 per cent of roads are rated as 3-star, and only six per cent carry a 4-star rating.[33] The Bruce Highway has been classified as one of Australia's deadliest highways and the Royal Automobile Club of Queensland (RACQ) estimate that 60 per cent of road deaths in Queensland occur on the Bruce Highway. The Queensland and Australian Governments are to be commended for their commitment to the upgrade of these major tourism routes. However, the Queensland Government must ensure that the construction timeframes and commitment to fund 20 per cent of these critical projects are maintained.

Further, TTF commends the Federal Government in offering financial assistance to local Government across each State to support maintenance of the nation's local road infrastructure as well as local projects and services. The Roads to Recovery programme will provide $3.2 billion from 2014-15 to 2018-19, to be distributed to local councils Governments responsible for local roads. Under the Financial Assistance Grants programme, local councils in Queensland will receive an additional $450.7 million to spend according to local priorities.

While the short to medium term funding environment is promising, long-term funding for roads must be maintained to further improve road infrastructure and integrated land-use and transport planning outcomes need to be delivered to improve the sustainability of local roads.

RECOMMENDATION

- Maintain long-term funding for roads.
- Ensure that the construction timeframes and commitment to fund 20 per cent of the Bruce Highway, Cunningham Highway, Warrego Highway, Gateway North and Toowoomba bypass projects are maintained.

[31] *Queensland Infrastructure Report Card 2010,* Engineers Australia.
[32] *2015-2018 Motoring Matters To Every Queenslander,* RACQ.
[33] *AusRAP Star Ratings Report*, 2013.

2.4.3. Access to nature-based tourism experiences

Queensland's destination brand is greatly enhanced by the State's natural estate. Five of the 19 World Heritage Listed sites in Australia are in Queensland. National parks alone are a significant contributor to the Queensland economy with research indicating that the total spend by visitors who include a visit to a national park contribute $4.43 billion to the State's economy. Direct spending by visitors that can be attributed exclusively to the existence of the national parks amounts to over $749 million per annum, adding around $345 million to GSP per annum.[34]

These visitors tend to generate higher yield than average, staying longer and spending more. With three of Australia's iconic National Landscapes situated within Queensland, the State is well-positioned to capitalise on the economic benefits of nature-based tourism. Beyond this, tourism can also contribute to broader environmental and social outcomes, providing funding sources and points of engagement for Queensland's natural assets. A study by Tourism Australia found consumers from some of Australia's key inbound markets viewed Australia's world-class beauty and natural environment as the third most important factor in selecting a holiday destination, behind only safety and value for money.

TTF strongly supports the Queensland Government's recent legislative reforms to encourage environmentally sensitive tourism investment in national parks, as well as efforts to streamline licences for ecotourism operators. These changes, along with the development of Queensland's Ecotourism Plan 2015-2020, will make it easier for domestic and international visitors to enjoy Queensland's natural estate, while providing industry with confidence to develop innovative ecotourism experiences. However, visitor access to Queensland's national parks and other natural assets needs to be improved. Tourist signage on roads in and out of Queensland's national parks must be improved to ensure they are clear, simple and understandable.

TTF commends the Queensland Government for introducing iBeacon technology across the State. The beacons will automatically deliver users of the *This is Queensland* tourism app with information about the top things to see and do in the area. The iBeacon technology has been installed at airports, visitor information centres, national parks and other popular tourist attractions. TTF encourages the Government to continue the roll-out of this technology at all national parks and tourist destinations in Queensland.

A framework needs to be developed to allow for greater access and commercial sustainability while at the same time supporting conservation. Appropriate and consistent resourcing for national parks is required to support these government initiatives, in particular funding for visitor infrastructure and park management.

Resourcing should be prioritised for areas most frequented by visitors to maximise return on investment – these include the iconic destinations of the Great Barrier Reef, the Wet Tropics and the Gold Coast hinterland.

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[34] *Queensland Ecotourism Plan 2015-2020 Draft for consultation*, October 2015.

RECOMMENDATION

- Improve tourist signage on roads in and out of national parks.
- Continue the roll-out of iBeacon technology at all national parks and tourist destinations.
- Develop a framework to allow for greater access and commercial sustainability while at the same time supporting conservation.

3. IMPROVING THE VISITORS' JOURNEY

3.1. VISITOR-FRIENDLY TICKETING

3.1.1. Enhance the *seeQ* and *go explore* cards

The *seeQ* card, TransLink's electronic travel card for visitors to South East Queensland, is a significant tourist offering and represents one of four visitor smart cards in Australia, with Melbourne, Adelaide and the Gold Coast being the only other cities in Australia to offer a specific visitor product.

Image supplied courtesy of TransLink

Melbourne's myki Visitor Value Pack costs $14 and is pre-loaded with enough value for one day's travel in Zones 1 and 2 of Melbourne's trains, trams and buses. The pack also includes discount offers for 15 Melbourne and regional attractions. The Gold Coast *go explore* card costs $10 and provides a one-day, reloadable pass for unlimited travel on light rail and TransLink's buses to theme parks, the airport and attractions. In comparison, the *seeQ* card is the most expensive visitor product and costs $79 for three days consecutive travel on all TransLink bus, train, ferry or tram services (including G:link). The card's high price is attributable to the inclusion of a $34 return Airtrain ticket.

TTF is supportive of the Queensland Government's decision to develop a visitor product; however, the *seeQ* card needs to be more price competitive.

If the Government is unable to decrease the cost of Airtrain tickets in the short-term, visitors should have the option of a *seeQ* card that does not include a return ticket on the Airtrain. This would reduce the price and capture those visitors who do not need a return Airtrain ticket during their stay in Brisbane. Airtrain tickets could be sold as an 'add-on' to the regular *seeQ* card. This gives tourists flexibility to decide what is best for their transport needs.

Likewise, the Government should also investigate developing a *seeQ plus* that, for an additional cost, offers visitors access to a range of attractions. For example, in Paris, visitors can purchase a Paris Museum Pass that gains entry to over 50 museums and monuments around the city. A visitor could have the option of adding a similar pass onto their *seeQ* card which could include, for example, unlimited access to all cultural institutions in Brisbane and entry into theme parks on the Gold Coast. To capture those tourists that only visit the Gold Coast, a *go explore plus* card should also be created to include entry into theme parks, zoos and other attractions on the Gold Coast such as The Wax Museum. This will reduce time queuing at attractions, save the visitor money and create a more enjoyable experience.

TTF recommends the Queensland Government allow the *seeQ* cards to be purchased at tourism information centres, major hotels and hostels or at visitor attractions in addition to convenience stores and online. The Gold Coast *go explore* card is available for purchase at hotels across the Gold Coast, but travel agents

could also be provided with these cards to sell to customers before their trip to Australia. In addition, TTF recommends the *go explore* card be available for purchase from fare machines at major tram and bus stops. TransLink's South East Queensland electronic commuter ticket, *go* card, can already be purchased at many Queensland Rail and G:link stations, and some busway stations. Providing visitors with the option of purchasing Gold Coast *go explore* cards at G:link stations and bus stops on the Gold Coast will greatly enhance the card's accessibility and improve the visitor's experience.

A price competitive visitor card is particularly important in light of Queensland's move to a more modern, technologically advanced ticketing solution. The Government is looking to implement account-based automated fare collection solutions as part of its next contract for *go* card. An account-based system will allow commuters and visitors to use contactless bank cards and mobile phones as their smart ticket, in addition to transit-issued smart cards currently in use. This system enables open payment and means consumers can pay for their transport services just like they would pay for any retail purchase.

For transit agencies, moving to an account-based system reduces the need to procure, encode, distribute and support a large number of smart cards. It will also reduce cash handling costs and the associated infrastructure investments and reduce fraud and fraud management costs. However, international visitors may not want to use their bank cards due to extra fees incurred by using their card overseas. A visitor smartcard product will still need to be offered to capture those tourists who do not wish to use smartphones or bank cards, or in situations where internationally issued cards are not accepted.

TTF also urges the Government to include multilingual options for ticketing machines. Visitors who hold a *go explore* card can reload their card with up to eight day passes at one time. However, unlike many cities around the world, existing ticket machines, train stations and bus interchanges in South East Queensland do not meet the needs of visitors with limited English language skills. Ticketing machines, particularly on the Gold Coast, must include multilingual options. Department of Transport and Main Roads should work with Tourism and Events Queensland to identify which languages should be available on the top-up machines.

RECOMMENDATION

- Lower the cost of a *seeQ* card by providing an alternative card that does not include a return Airtrain ticket.
- Develop a *seeQ plus* and *go explore plus* card that offers visitors the option of access to a range of attractions.
- Provide for the *go explore* card to be purchased from fare machines at major tram and bus stops.
- Implement account-based ticketing to allow the use of contactless bank cards and mobile phones as a smart ticket.
- Include multilingual options in *go* card top-up machines to reflect the diverse origins of visitors to Queensland.

3.1.2. Better transport support for major events and attractions

Major events are an important part of sporting and cultural life in Australia and are a vital part of the visitor economy. Major events in Brisbane are dominated by sporting events at centres such as Suncorp Stadium, the Gabba and Queensland Tennis Centre. Most major events can be accessed by public transport either through regular services or special event services. The mode share of public transport for events at Suncorp Stadium and Queensland Tennis Centre are among the highest in Australia, with both at about 80 per cent.[35]

The provision of public transport services during major events is critical to reduce congestion on the road network and improve the visitor experience. Integrated ticketing - the integration of the transport fare in an event's ticket - is a proven method in promoting public transport during major events. The additional cost of public transport is included in the price of all tickets sold for an event and is not dependent on whether a ticketholder actually uses public transport. This provides a direct incentive for event-goers to use public transport, and in most cases, it means that the transport component is offered at a discounted price for those that utilise this option.

Other benefits of integrated ticketing for major events include the opportunity to promote the use of public transport particularly with non-traditional users of public transport services, alleviating queuing when boarding transport services and a seamless ticket experience.

Integrated ticketing is in use on a regular basis for events at Suncorp Stadium and the Gabba, and TransLink has arrangements with Cbus Super Stadium and Metricon Stadium on the Gold Coast as well as the Queensland Tennis Centre and Boondall Entertainment Centre. Integrated ticketing provides considerable benefits for transport authorities, event organisers, event goers and the broader community. However, some event organisers have been unwilling to support integrated

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[35] *Accessing Major Events*, TTF, September 2011 and *Yeerongpilly footbridge gets a super lift* – Media release 23/11/2010, Queensland Government.

ticketing. The variable implementation of integrated ticketing by event organisers and stadia adversely impacts public transport mode share and creates inequitable outcomes in the funding of transport for major events.

The organisers of one of Brisbane's most well-known events, the Ekka Royal Queensland Show, have not introduced integrating ticketing and have deemed the imposition of an integrated ticket too prohibitive to potential visitors. TTF believes the perceived cost deterrent of a public transport levy on each ticket is unfounded.

More than 400,000 people attended the 10 day show last year. In the absence of an integrated ticket, TransLink has introduced special Ekka travel ticket which costs $6 return for adults and is valid for travel to and from the event. Other major events such as Riverstage concerts and the Big Day Out have also not introduced integrated ticketing.

TTF urges event organisers and stadium management authorities to embrace integrated ticketing in order to improve the cost recovery of transport provided for major events. Government and TransLink must also actively promote the implementation of integrated ticketing for major events and venues not currently including fares as part of their ticket. This could be achieved by offering integrated tickets at a common price for events that do not require additional transport services. As a last resort, Government should reserve the right to introduce legislation mandating integrated ticketing for large events.

The Government should also consider extending integrated ticketing to major attractions such as the theme parks on the Gold Coast and the galleries at Brisbane's Cultural Centre.

RECOMMENDATION

- Work with organisers of the Ekka to offer integrated ticketing.
- Promote the implementation of integrated ticketing for other major events and venues not currently offering it.
- Extend integrated ticketing to major attractions around South East Queensland such as the theme parks on the Gold Coast and the galleries at Brisbane's Cultural Centre.

3.1.3. Transport ticketing for international conventions and exhibitions

Major business events are important to the visitor economy. Over 37 million people attended more than 412,000 business events across Australia in 2013-14. In 2014, business events generated $28 billion in direct expenditure across the Australian economy. By 2020, the figure is expected to increase to $31 billion.[36] International business event visitors spend on average 20 per cent more than interstate visitors. Business events also foster business investment and the exchange of new information and ideas, as well as profiling Australian know-how to the world.

Queensland hosted the third largest number of events and delegates in 2014, behind Victoria and NSW.[37] As Brisbane is competing with other national and international cities to host major events, the regular availability of a free transport smartcard for delegates and attendees for the duration of an event would

significantly improve Brisbane's offering in what is a very competitive market.

Image supplied courtesy of TransLink

TTF commends the Queensland Government for developing the *go access* Corporate Events Card. The initiative allows conference or event organisers to provide attendees with a *go* card with three days unlimited travel. The card costs organisers $12 and they have the option of adding extra days from $4 per day for a maximum of eight days. To buy the card, organisers must be approved by TransLink. The Government should continue to market this product to ensure it is available for delegates at all major international conventions and exhibitions.

RECOMMENDATION

- Continue to market the *go access* Corporate Events card to ensure it is available for delegates at all major international conventions and exhibitions.

3.2.   PRIVATE SECTOR INVOLVEMENT

3.2.1. Engage the private sector to deliver public transport services

Franchising, or contracting out, public transport services can lead to an improved customer experience, lower operating costs and an increased focus on customer satisfaction. This is particularly important from a tourism perspective to ensure visitors enjoy their experience in a city and recommend the city to their networks.

TTF urges the Queensland Government to explore opportunities to franchise Brisbane Transport buses. Furthermore, existing private contracts in South East Queensland must be continually reformed and subject to periodic competition to ensure Government is maximising value for money.

[36] *Business Events Council of Australia,* 2014.
[37] *The Value of Business Events to Australia*, Business Events Council of Australia, February 2015.

Buses play a critical role in public transport coverage in Australia's capital cities. In metropolitan areas buses provide approximately 40 per cent of overall public transport trips, amounting to nearly 600 million journeys per annum, or roughly 1.5 million trips each day. Buses not only provide direct mass transit links to our major CBDs and connect commuters to transport hubs, but they also play an important role in providing a multimodal transport service for tourists, particularly in and around CBDs and entertainment precincts.

In Brisbane, the Brisbane City Council owns and operates Brisbane Transport, the largest bus operator which largely serves the inner city areas. Tourists can take advantage of special NightLink bus services, operated by Brisbane Transport, running after midnight on Fridays and Saturdays and can travel around the CBD using the free City Loop and Spring Hill Loop. Additionally, Brisbane Transport's CityGlider service operates between popular tourist centres such as West End, Southbank, Fortitude Valley and New Farm.

Existing private bus contracts in Brisbane have never been tendered due to resistance by operators and lack of Government resolve to push through such a reform. However, there is strong evidence from Australia and internationally that the private sector can deliver bus services more cost effectively than Government operators. Around the world, unit costs savings on transition from public to private operations have ranged from 20 per cent to as high as 55 per cent.[38] Areas of greater efficiency include improved staff productivity, greater labour flexibility, better asset utilisation, more efficient procurement and leaner head office structures. The private sector also tends to have greater incentive to innovate and exceed performance benchmarks than government-owned operations due to competitive tendering processes.

Many other bus routes around Queensland have already been privatised, with approximately 16 private providers of bus services in Queensland. Amongst these operators are Transdev Queensland, operating 26 regular bus routes in the Redlands area and Transit Australia Group operating bus services for Sunshine Coast, Rockhampton, Townsville, Magnetic Island and Cairns. Franchising is the most common form of contracting, particularly for bus services that do not involve the infrastructure complexity of rail systems. Governments generally retain significant control over fare levels and service levels, for example, setting minimum requirements for timetables.

Franchising does not only produce greater efficiencies for bus services, it benefits all forms of public transport including heavy rail, light rail and ferry services. The Gold Coast light rail, for example, is privately operated by GoldLinQ, who have the right to operate the service for 18 years. Stage 1 of the network exceeded expectations and drove a 25 per cent increase in public transport patronage on the Gold Coast in the first year of operation alone.[39]

RECOMMENDATION

- Explore opportunities to franchise Brisbane Transport.
- Reform existing private contracts to ensure they are subject to periodic competition

[38] *Public Transport, Private Operators*, L.E.K. / TTF, 2012.
[39] *Stage two of Gold Coast light rail on track for Commonwealth Games* – Media release 11/10/15, Queensland Government

3.3.   ACCESS TO INFORMATION

3.3.1   Enhance the 'This is Queensland' tourism application

While translating web and app content from English to foreign languages is a good first step, it should be noted that visitors may not need the same information that is available on the standard resident-based transport apps. Visitors to Queensland have access to a dedicated tourist app, *This is Queensland*. The app is a valuable tourism innovation and it helps visitors plan, book and share their holidays. The app displays maps, popular things to do, and also has beacon technology which instantly identifies a visitor's location and provides tailored destination information.

TEQ's iBeacon technology is a cutting edge innovation, and TEQ should continue to roll out this technology at all tourist destinations and major events. However, the app does not include transport timetables or route information, or how to get to major tourist attractions.

TTF recommends the Government integrate a personalised journey planner feature into the app in order to improve the visitor's ease of getting from one destination to another. The personalised journey planner could prompt users to enter their top three interests, such as sports, arts and entertainment, or nature and wildlife, as well as their number of days holidaying in the State, and could create a detailed itinerary with transport options included. The journey planner could also include the option of the user inputting the

number of travellers, whether it is a family of four or a couple, and could create an itinerary tailored to that type of user. For example, an itinerary of a family of four might include the theme parks on the Gold Coast and the planetarium in Brisbane.

The journey planner should be available with multilingual options, and information about transport services should include private sector operations such as tourist shuttles, private ferry routes, airport shuttles and taxi rank locations. The app should include information about the *seeQ* and *go explore* cards, and where to buy them. Furthermore, TransLink should consider working with local visitor attractions and hotels to include the trip planner tool on their websites.

Best practice snapshot 3:

THE MTR TOURIST TRANSPORT APP

Hong Kong transport operator, MTR Corporation Limited, has developed a transport app targeting visitors called MTR Tourist. MTR Tourist is more than a transport app and promotes Hong Kong as a visitor destination. It suggests sightseeing, history, shopping or art and culture tours around the city, using public transport between each stop.

The search engine allows the user to plan their journey from station to station, or station to destination, showing the recommended route with the estimated travel time, interchange, fares and closest exits.

MTR Tourist features a train and light rail trip planner and contains bus information. The app also allows the user to search for travel information from the airport to hotels and includes details about the free Airport Express Shuttle Bus service. The app is available in English and Chinese.

RECOMMENDATION

- Integrate a journey planner feature into the app.
- The journey planner on TransLink's website should be available in several languages.
- Work with hotels and visitor attractions to include the trip planner tool on their websites.

3.3.2. Destination promotion on public transport

Advertising in train stations and bus stops is an integral source of revenue for public transport operators and helps fill the gap between the transport fare the customer pays and the actual cost of providing the service. Advertising on-board vehicles is also an efficient way to promote destinations accessible by public transport. This is especially relevant on bus, ferry and train lines highly frequented by visitors such as the airport line, the Gold Coast G:link and the CityGlider and CityHopper services in Brisbane. Local authorities need to take an active role in destination management. Together with the tourism sector, they can help create a unique sense of place and an attractive environment for both visitors and residents.

TTF commends Brisbane City Council's transformation of four CBD bus stops, through its subsidiary Brisbane Marketing, to promote tourism in the Brisbane region. TTF recommends the continued roll out of advertising at stations, and urges the Government to resource Brisbane Marketing and Gold Coast Tourism to expand tourism promotion on-board buses, trains and ferries in order to encourage visitors to go further than Brisbane and extend their stay in Queensland.

RECOMMENDATION

- Brisbane Marketing and Gold Cost Tourism should be resourced to continue the roll out of attraction and destination advertising at stations.
- Expand tourism promotion on-board buses, trains and ferries.

3.3.3. Multilingual wayfinding information

The value of wayfinding is often underestimated. While locals often do not even notice signs, domestic and international visitors are constantly looking for them. Without efficient wayfinding, the area traversed by visitors is significantly reduced and many suburbs or businesses are missing out on a crucial growing market of customers.

Tourism Research Australia (TRA) has developed strategies for tourism operators in their 2013 report titled *Engaging with Asia*. TRA notes a number of strategies to overcome language barriers, including in particular translation of signage. Multilingual signage allows visitors to better understand the region and enriches a region's society and culture.

TTF commends Brisbane City Council for developing a wayfinding system targeting its key visitor market. Based on the target audience of short stay international tourists and long stay international students, messages in Korean, Japanese, Traditional Chinese and Arabic were introduced to the signage.

While Cairns Airport displays multilingual signage in its terminal and precinct, similar signage is not used elsewhere in the Cairns CBD and at key tourist destinations around the region. TTF urges Cairns Regional Council to consider introducing multilingual messaging on signs located in the CBD and visitor precincts such as Cairns Esplanade, the Botanic Gardens and the Great Barrier Reef. In addition, TTF recommends multilingual wayfinding and general street signage be improved across the State, particularly in other key tourism areas.

Councils and the Queensland Government should consider using augmented reality at tourist destinations. Augmented reality is a technology that superimposes a computer-generated content over live images viewed through cameras on smartphones and tablets. Such technology could be employed in museums, historic buildings, and natural environments such as beaches and rainforests, as part of an interactive experience for children, and as part of navigation and wayfinding. The content a visitor sees should be presented in multiple languages.

Councils should also consider implementing interactive wayfinding signs throughout their city. Hobart City Council recently trialled interactive wayfinding signs featuring directional information, distance markers and listings of place of interest. Visitors can also scan a QR code to receive more information. The program is expected to improve the ease of walking around the city, boost health and wellbeing, increase pedestrian traffic for local businesses and create a more enjoyable experience for visitors.

RECOMMENDATION

- Introduce multilingual messaging on signs located in Cairns CBD and visitor precincts.
- Use new technologies, including augmented reality, to enhance information delivery at tourist destinations.

Best practice snapshot 4:

THE NEW YORK SUBWAY IPHONE APP – UTILISING AUGMENTED REALITY

New York has one of the largest and most famous rapid transit systems in the world. It is user-friendly, accessible and efficient.

The New York Subway iPhone app, created by Presselite, utilises augmented reality on the transport network. Using the phone's camera, the app will display the nearest stations and points of interest in New York from the current location of the user. The station information displayed includes the station's distance from the user as well as the various network lines.

When a station is selected on the app, a red arrow is displayed to show the direction and the distance to that station. Points of interest, including food and drink, leisure, attractions and accommodation can also be displayed through the app. A bookmark manager allows the user to save stations and routes.

The app is available in English, French, Spanish, German and Japanese.

3.4. IMPROVE COORDINATION WITH OTHER TRANSPORT PROVIDERS

3.4.1. Harmonise car rental regulation

Car rentals play a critical role in the visitor's mobility. Whether it is for domestic travellers, residents who don't own a car or international visitors, it is often the favourite transport mode to escape the city and visit regional Queensland. However, red tape is impeding

the efficiency of rental car businesses, which in turn affects the visitor's experience. The rental vehicle industry abides by eight different State and territory regulatory and tax regimes – with only Tasmania recognising rental vehicles within their own regulatory framework.

Regulatory guidance and legislative instruments have been created without a clear national policy objective and lack the simplicity and flexibility required for a healthy operating environment. For operators, this has stymied industry growth, hindered product innovation, reduced the efficiency of the workforce, made it difficult to determine the compliance task, created a significant administrative burden, and led to cost inefficiencies. For regulatory agencies, it has fashioned a significant knowledge gap, limited national data on the size, value and economic contribution of the industry, and created cost inefficiencies. TTF calls for regulation and tax reform to ensure a consistent national framework that promotes investment and innovation in the sector.

RECOMMENDATION

- Work with the Federal Government to harmonise the tax and regulation framework applying to the car rental industry across Australia.

3.4.2. The sharing economy

Traditional taxis play a crucial role for residents and workers and even more so for visitors. The taxi industry is especially important at night time to service entertainment precincts and cultural venues. They are also a critical element of the transport network during special events, whether it is a convention, sport event, music festival or New Year's Eve.

However, the quick pace of technological change has seen a dramatic shift in the provision of goods and services in the economy. These disruptors have placed enormous pressure on traditional operators and regulators, whose legislative frameworks predate the arrival and business models of new players in affected sectors.

Consumers who use sharing economy platforms have clearly expressed an interest for convenience, ease of use and affordability. Traditional operators in disrupted sectors are now seeking to adapt to this expression of consumer preference by further developing their own service offerings.

The challenge for regulators, however, is to ensure that their framework is responsive and flexible. The sharing economy is likely to transition from disruptor to mainstream operator, but this cannot be allowed to happen without these services being regulated to deliver consumer and community amenity.

Disruptive booking apps such as ingogo and goCatch, as well as the emergence of ridesharing services like Uber, have challenged the taxi industry and proved popular with consumers. Uber, in particular, has highlighted a change in consumer preferences in Australia. Uber has already been legalised in Western Australia, New South Wales (NSW) and the Australian Capital Territory, and Tasmania is working to provide a legal framework for sharing economy business operations including Uber and Airbnb. The NSW Government also established an inquiry into the adequacy of the regulation of short-term holiday letting.

TTF urges the Queensland Government to develop a ridesharing framework that is flexible enough to respond to the dynamic forces in the market and that strikes the right

balance between ensuring safety and service standards while at the same time not stifling innovation. Similarly, the State Government should also review visitor accommodation regulation to ensure a more competitive environment for all tourism business operations and investment.

- Develop a ridesharing framework that is responsive, flexible and does not stifle innovation.
- Review visitor accommodation regulation to ensure a more competitive environment for all tourism business operations and investment.