

2032 OLYMPIC & PARALYMPIC TOURISM ASSESSMENT

SWQROC | MAY 2023



PROJECT BACKGROUND

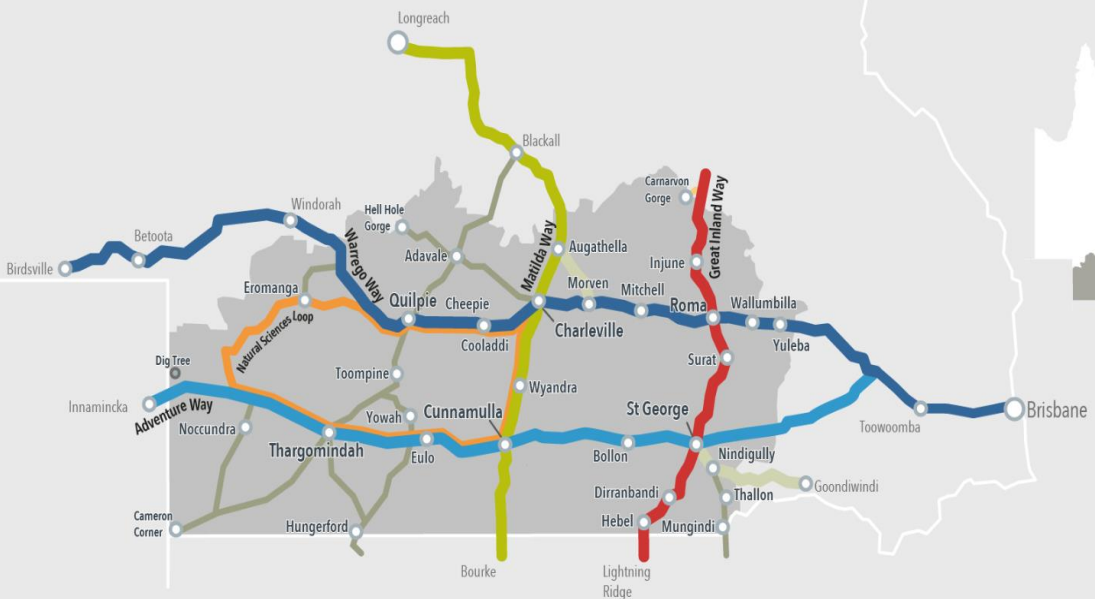
The South West Queensland Regional Organisation of Councils (SWQROC) was established in 2020 and is comprised of the Balonne, Bulloo, Maranoa, Murweh, Paroo, and Quilpie councils. Its aim is to provide a single and united organisation for the region through proactive leadership and improved advocacy capability and capacity. The SWQROC also supports strategic collaboration, being involved in the Western Queensland Alliance of Councils (WQAC), which brings together a larger group of 22 councils across Western Queensland to advocate for and address common issues and opportunities via three organisations (also inclusive of the Remote Area Planning and Development Board and North West Queensland Regional Organisation of Councils).

Significant opportunity exists across the region, with the upcoming 2032 Olympic and Paralympic Games to be held in Brisbane (hereafter referred to as the Olympics). The Olympics will generate international tourism and trade, which Queensland's regions can capitalise on with suitable planning. Now is the opportune time for the region to prepare for the Olympics, through understanding the strengths, weaknesses opportunities and threats associated with the Olympics.

It is timely that a tourism assessment is developed for SWQROC and the broader WQAC as an initial step in identifying opportunities to position the region and provide a well-planned and professional approach to attracting visitation and investment opportunities before and after the Olympics. The analysis will provide insights about what work is required to draw visitors to Queensland's regions. This work is the first step in a longer-term positioning program to align and realise opportunities for Queensland's regions related to the Olympic and Paralympic Games.

APPROACH

Assessment of the Strengths, Weaknesses, Opportunities, and Threats (SWOT) provides a concise and targeted format for the initial identification of opportunities relating to the Olympics. The following approach was carried out:



SOUTH-WEST QUEENSLAND TOURISM

Over the decade to 2019, the visitor economy within the SWQROC region strengthened. Visitors are typically attracted by the events, key attractions, people and country atmosphere across the region.

The policy actions undertaken during the COVID-19 pandemic had a significant impact on visitor movements across Australia; the regions were not immune to this. Given this, the visitor economy in the SWQROC region can be best represented by the trends in and to 2019 (i.e., the year before the pandemic).

Tourism in the SWQROC region in 2019 is characterized by the following:

5.6%

Annual Average Visitor Growth

Visitation to the SWQROC region grew by an average of 5.6% per annum from 2011, to reach over 842,000 visitors by 2019^{1,2}.

4
Nights

Average Overnight Stay

Overnight visitors stayed for 4 nights on average^{1,2}.

\$89.40

Average Consumption Per Day/ Night

Visitors consumed an average of \$89.40 worth of tourism goods and services per day/ night in 2018-19, including an imputed value for the goods and services consumed by visitors for free³.

36.4%

Domestic Visitors from Outback Queensland

The largest proportion of domestic visitors came from Outback Queensland at 36.4%, followed by Brisbane (24.7%) and Southern Queensland Country (13.8%)¹.

33.4%

International Visitors from New Zealand

The largest proportion of international visitors were from New Zealand at 33.4%, followed by France (11.9%) and Germany (9.9%)².

26.3%

Domestic Holiday Visitors

The largest proportion of domestic visitors came to the SWQROC region for holidaying purposes at 26.3% followed by business visitors (21.4%) and those visiting relatives (15.9%)¹.

66.6%

International Holiday Visitors

Holidaying was the most common reason for international visitors to visit the region at 66.6%, followed by visiting friends and relatives (23.7%) and for employment (7.0%)².

16.1%

Dining Out Is Popular Amongst Domestic Visitors

Whilst in the SWQROC region, the most common activities for domestic visitors were eating out or dining in restaurants or cafes (16.1% of activities undertaken); visiting friends and relatives (10.1%); and going to pubs, clubs or discos (8.9%)¹.

7.5%

Sightseeing Is Popular Amongst International Visitors

The most common activities for international visitors were sight seeing and looking around (7.5% of activities undertaken), eating out or dining in restaurants or cafes (7.2%), and going shopping for pleasure (6.2%)².

KEY ATTRACTORS



Major Events

Roma's Easter in the Country, Maranoa
Bamba Gii Festival, Maranoa
Yowah Opal Festival, Paroo
Shearers Shindig, Bulloo
River Dragon Festival, Balonne
Outback Queensland Masters, Quilpie/ Maranoa/ Murweh
Cobb & Co Festival, Maranoa
Yowah Opal Festival, Paroo
Cunnamulla Fella Roundup, Paroo
Grazing at the Watering Hole, Balonne
St George 399, Balonne



Strategic Tourism Assets

Thallon GrainCorp Silos, Balonne
Bowra Wildlife Sanctuary, Paroo
Nullawokka Cultural Tourism, Balonne
Cameron Corner, Bulloo
Currawinya National park, Paroo
Eromanga Natural History Museum, Quilpie
Hell Hole Gorge National Park, Quilpie
Artisan Baths, Paroo
Roma Big Rig, Maranoa
Charleville Cosmos Centre, Murweh
Roma Saleyards, Maranoa
Dig Tree, Bulloo
Numerous Regional Airports (incl. Roma Airport)
WWII Secret Base, Murweh
Outback Museum of Australia (OMOA), Murweh
Riversands Wines, St George

THE OLYMPIC OPPORTUNITY

The Olympics is anticipated to generate \$4.6 billion in economic benefits to Queensland through an uplift in international tourism and trade⁴. Analysis of case studies has identified the following opportunities for the region:

- **An Escape:** Case studies of the Los Angeles 1984 Olympics and the Sydney 2000 Olympics showed that non-Olympic visitors to the countries were deterred by expectations of large crowds and high prices⁵. This presents an opportunity for the SWQROC region to be marketed as an escape from crowds and as an authentic Australian experience. With its proximity to Brisbane, the SWQROC region can attract Olympic visitors looking for an escape from the city or non-Olympic visitors looking to avoid the city.
- **Travel Packages:** Olympic tickets are sold through a limited number of travel agencies/ providers worldwide⁵. For the Sydney 2000 Olympics, marketing companies developed Olympic travel packages which included Outback Queensland destinations. For visitors with limited time, the SWQROC region is the closest outback experience to Brisbane.
- **Sports Offerings:** The Beijing 2022 Winter Olympics prompted an increased interest in sports and an increase in sport tourism⁶. Sports enthusiasts and leisure travelers visited areas which had offerings in their sport of interest. The SWQROC region can capitalise on this interest by investing in specialty sports tourism offerings or in sports and leisure attractions, for example, campdrafting schools and competitions or hunting packages.
- **Carbon Neutrality:** From 2030 onwards, all Olympic Games will be required to minimize and compensate the direct and indirect carbon emissions and implement zero-carbon solutions for the Olympic Games and beyond⁷. Though there is currently no material detailing the carbon neutrality criterion, this presents an opportunity for innovative solutions to reducing emissions but presents a challenge for the SWQROC region due to the additional carbon emissions to transport visitors to the region.

SWOT ASSESSMENT

The SWQROC region has a number of natural and comparative advantages, which attract tourists, as well as a number of challenges that could be addressed to grow the visitor economy. The strengths and weaknesses of the tourism landscape in the SWQROC region are detailed below.

STRENGTHS

Accessibility

As the closest outback region to Brisbane, the SWQROC region is the quickest for Olympic visitors to access. The region has good access to airports, including the Toowoomba Wellcamp Airport, and it has mostly adequate road infrastructure which is up to date on google maps and promotes the drive tourism market.

Existing Tourism Offerings and Cohesive Regional Approach

The SWQROC region offers a range of tourism products including paleo or natural science tourism, astro-tourism (stargazing across the unpolluted skylines), artesian baths, drive trails and self guided tours, caravanning and camping. The region also has a cohesive regional tourism approach through which member councils market and advocate for their tourism industry together.

Natural Landscapes and Wildlife

Clear skies, national parks, rivers, flora and fauna (new to international visitors), and wildflower season make the SWQROC region unique.

Indigenous Culture

Nullawokka Cultural Tourism, Ballon Off-Country Tours and the expanding Indigenous art experiences showcase the region's Indigenous culture, though there is room for further expansion.

Outback Experience

The SWQROC region's outback pubs and characters, with country hospitality, and a new Outback Museum create an outback experience unique to the South-West.

WEAKNESSES

Infrastructure

Variety, quality and quantity of accommodation and infrastructure is limited, and existing infrastructure is deteriorating.

Access to Labour

Businesses across the SWQROC region are experiencing staff shortages.

Awareness

There is limited awareness of the region and its offering, particularly among interstate and international visitors who comprised 15.0% and 1.2% of visitors in 2019^{1,2}, respectively.

Local Transport Supply

There is a limited availability and/ or affordability of flights, car hire, public transport, fuel and electric vehicle charging stations, as well as limited transport options for people with disabilities. Prolonged flooding on roads also impacts the ability of tourists to access the region.

Operator Capacity and Carbon Neutrality

The capacity of tourism operators to take on more visitors is limited with existing amenities, finances and number of staff and volunteers. The local drive towards more sustainable practises is also limited.

Attraction Capture

Activities related to guided tours, national parks, museums or events made up a small proportion of activities undertaken in the region in 2019^{1,2}.

SWOT ASSESSMENT

The opportunities and threats presented below represent the initiatives that could be undertaken to increase visitation to the region and external factors which can negatively impact visitation.

LEGACY OPPORTUNITIES

Travel Packages or Trails

Create travel packages with guides including bus tours, charter flight tours, art trails, walking trails, and corporate travel packages. Create cross-regional packages including outback, paleo, and city to country tours as well as tours which incorporate Tropical North Queensland.

Increased Awareness

Raise the profile of the region through marketing initiatives. Investigate new target markets including corporate markets, Olympic sponsors, the high yield South-East Queensland market, and New Zealand international visitors.

Expanded Experiences and Offerings

Expand and reinvest in indigenous cultural experiences, the natural sciences loop, outback experiences, and paleo tourism as legacy tourism investments.

New Tourism Products

Invest in developing new attractions as legacy tourism investments including dining experiences which showcase local produce, health and wellness, mountain bike trails, wildlife (including endangered species) experiences, agritourism, ecotourism and Indigenous cultural experiences.

Olympic Training and Cultural Showcases

Whilst not a legacy opportunity, the region can attract Olympians and other sport tourism visitors, through the Roma's Gun Club, horse sports, or rowing. Advocate for inclusion in cultural showcases including the torch relay.

THREATS

Perceived Isolation and Cost of Transport

Potential visitors perceive the SWQROC region to be more isolated than it is. The region can also be expensive to get to.

Expectations of Technology

Tourists increasingly expect attractions to incorporate technology which is interactive and up to date.

Competitor Jurisdictions

The SWQROC region will be competing with many other jurisdictions within Queensland and interstate to host athletes and facilitate training. Olympic visitors and those looking to escape Brisbane will have the opportunity to travel to other destinations in Queensland, interstate and internationally.

Unfavourable Weather

The SWQROC region is prone to unfavourable weather with hot summers deterring visitors and prolonged flooding on roads.

NICHE TOURISM CASE STUDIES

The **Field of Lights** is considered a must-see attraction at the base of Uluru⁸. The art installation offers a tech wonderment experience with 50,000 solar powered lights resembling a field of flowers. As well as general admission at sunrise and sunset, the attraction has led to by-products including canape and dinner packages.

Hosting 360,000 people in 2021, the **Dinosaur National Monument** is the largest dinosaur attraction in the United States⁹. The attraction includes several exposed fossils with commentary provided by rangers as well as other on-site attractions including white-water rafting, cultural sites, historic education, wildlife watching and camping.

DEVELOPMENT OPPORTUNITIES

The expansion of the tourism industry in the SWQROC region will require a number of initiatives to be undertaken in collaboration with the broader region (Western Queensland) and the Queensland and Australian Governments. Development requirements include:



Investment

Public and private funding for legacy infrastructure and supporting infrastructure such as accommodation (i.e., an Olympic Legacy Fund).

Government support packages for green or sustainable products including guidelines for what products and services are eligible.

Establish an inventory of shared needs targeting sustainable funding and resource prioritisation for all Western Queensland regions into the future.

Develop business cases for key investment opportunities to attract investment.



Marketing

Advocate for establishing clearly defined marketing roles and responsibilities across tourism industry representatives.

Review existing marketing strategies and programs.

Develop a regional tourism marketing plan.

Develop marketing assets including online and physical promotional tools.

Networking to gain recognition and promotion across councils, Queensland Government and tourism associations for Western Queensland's involvement in the Olympics.



Collaboration

Collaboration among Local and Queensland Governments.

Collaboration among tourism service providers and agencies.

Advocate for regional representation on the Olympics Legacy Committee and coordination from the Queensland Government for regional involvement in the Olympics.



Policy

Develop an Olympics Action Plan to include action plans for tour and package development and accessibility improvement. The Olympics Action Plan may serve as a framework for future major events.



Skills Development

Skills development and training for local businesses regarding how they can support the identified opportunities. This may require the allocation of a dedicated (and funded) resource.

Create a workforce development strategy and seek Government funding for implementation.

NEXT STEPS

To understand and amplify the specific tourism opportunities afforded by the Olympics, the councils of South West Queensland are required to collaborate and advocate for the region, and for Western Queensland more broadly. To continue to progress this initiative, the following work should be undertaken:

- **Prioritise** opportunities for Western Queensland's involvement in the Olympics.
- Perform a **detailed investigation** into what is required for the preferred opportunities.
- Develop an **action plan** to progress the identified opportunities.



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