Brisbane is a great place to live, work and relax - it’s a safe, vibrant, green and prosperous city, valued for its friendly, and optimistic character and enjoyable subtropical lifestyle. In recent decades we’ve seen our city go through an enormous transformation, which is unlocking Brisbane’s full potential as Australia’s New World City. Now it is time to take our next step.

This Tourism Investment Guide outlines the vision we hold for Brisbane as a “top 100 most visited global city” - on par with cities like Rio de Janeiro, Vancouver and Abu Dhabi. It outlines our plan to unlock Brisbane’s full potential to attract and convert additional visitor expenditure through increased investment in tourism infrastructure - something that will benefit the city and its residents for years to come.

I would like to thank the city’s economic development board, Brisbane Marketing, for collaborating with the Department of Innovation, Tourism Industry Development and the Commonwealth Games to produce this guide. The transformation of Brisbane has led to more opportunities for the city and its people, and by working to further Brisbane as a destination of choice for tourism, we will continue to see the city’s reputation grow globally.

Graham Quirk
Lord Mayor of Brisbane

Brisbane is a vibrant capital city with a subtropical outdoor lifestyle, offering world class major events and with nature right on our doorstep.

Tourism is vital to the Brisbane economy - worth $7.8 billion and supporting more than 60,000 jobs. This Tourism Investment Guide will provide opportunities to grow this crucial industry and tourism infrastructure.

We are already seeing our city transform before our eyes with more than $12 billion worth of projects underway including the Queen’s Wharf redevelopment, Howard Smith Wharves, International Cruise Terminal and a new runway at the Brisbane Airport.

This Guide outlines our plans to leverage these developments and our next steps to drive visitation, increase expenditure, attract tourism operators, attract investors and more events to Brisbane.

The Queensland Government will continue partnering with Brisbane Marketing to put Brisbane on the map, because Brisbane is where life is beautiful one day and perfect the next.

The Honourable Kate Jones MP
Minister for Innovation and Tourism Industry Development and Minister for the Commonwealth Games
Brisbane Marketing and the Department of Innovation, Tourism Industry Development and the Commonwealth Games have completed a significant body of research into the future economic value of tourism in the region. Benchmarking the city against 200 global cities and analysing the potential economic growth of the visitor economy to 2031, this research found that:

**Brisbane is...**

A leader in the Asia Pacific in growing overnight visitor expenditure with the potential to deliver an additional $6.5 billion in visitor expenditure by 2031.

- Growing at **8.8% per annum**, propelling Brisbane into the global top 100 cities on par with Rio de Janeiro, Vancouver and Abu Dhabi.

- Generating an additional **48 million** visitor nights in the region.

- Requiring **$16 billion** in new tourism infrastructure investment in transport, accommodation, attractions and services.

- Has an opportunity to drive total visitor numbers from **7.8 million** overnight visitors in 2017 to **14 million** in 2031.

- The potential to support an additional **70,000 tourism jobs**.

...**Australia's New World City**
BRISBANE IS A SERIOUS PLAYER IN THE ASIA PACIFIC AND ONE OF AUSTRALIA’S MOST WELCOMING, SPIRITED AND ENERGISED CAPITAL CITIES, OFFERING A SUBTROPICAL LOCATION, WORLD CLASS MAJOR EVENTS, COASTAL, ISLAND AND COUNTRYSIDE EXPERIENCES.
Brisbane is Australia’s New World City: combining the best of Australia with a fresh, modern outlook to create a new kind of global city. A capital city with an enviable subtropical lifestyle, a global hub for innovation, research and the start-up community.

The Brisbane region is on the cusp of unprecedented growth in the visitor economy, with $12 billion in new tourism-related infrastructure projects underway. Brisbane Marketing and the Department of Innovation, Tourism Industry Development and the Commonwealth Games have jointly prepared this guide to highlight the opportunities that exist to grow the city’s visitor economy with the right tourism infrastructure.

By realising its full potential, the city could convert an additional $6.5 billion in visitor expenditure and position Brisbane in the top 100 most visited global cities with Rio de Janeiro, Vancouver and Abu Dhabi by 2031.

“Brisbane is a dream destination. Year-round sun and an outdoor lifestyle – it’s quickly evolving into one of the world’s greatest cities which is why W is kicking off the brand’s return to Australia here in the Sunshine State.”

Bruce Ryde, Vice-President for Luxury Brands and Brand Marketing, Marriott International Asia-Pacific

Brisbane
49% of Queensland’s international market spend at least 1 night in Brisbane, with the potential to double this length of stay by 2031.

Brisbane is accessible by 3 international and domestic airports, with seat capacity set to double by 2022, giving Brisbane greater capacity than Hong Kong or Singapore.

There are more than 4 million residents and 18 million visitors every year within a two-hour radius of the city centre.
Brisbane Airport is set to welcome an additional 77,000 flights and over 10.5 million passenger movements by 2022.

Over $10 billion is earmarked for investment in transport infrastructure by 2025.

Over 5,700 new rooms have come online since 2011, a 32% increase.

North America
40 avg. weekly services

South Pacific
56 avg. weekly services

New Zealand
96 avg. weekly services
A MICROCOGSM OF THE BEST AUSTRALIAN EXPERIENCES.

CITY AND SURROUNDS
THE OPPORTUNITY
Brisbane is an outdoor river city with the potential to drive an additional $3.2 billion of visitor expenditure in 2031 with new destination accommodation and experiences.

UNIQUE SELLING POINTS
✓ Compact and walkable CBD with modern services
✓ The river backdrop and connectivity
✓ Cultural experience (Queensland Art Gallery, Gallery of Modern Art), Powerhouse, Newstead House, etc)

CUSTOMERS WANT MORE
- Access from the city
- Iconic accommodation
- Places to enjoy local gourmet food and beverages

HINTERLAND
THE OPPORTUNITY
Bringing the hinterland and food bowl experience closer to the city will help to drive an extra $1.2 billion every year by 2031.

UNIQUE SELLING POINTS
✓ World Heritage Rainforest
✓ Food bowl and emerging gourmet food experiences
✓ Farms and primary production
✓ Heritage pubs and villages

CUSTOMERS WANT MORE
- Access from the city
- Iconic accommodation
- Places to enjoy local gourmet food and beverages

SCENIC RIM

SOMERSET

IPSWICH

LOCKYER VALLEY 60 mins
THE RIVER

THE OPPORTUNITY
The River offers a marine experience that could rival the Great Barrier Reef and become a must-do tourism opportunity for the city that could convert an additional $1 billion every year in visitor spend.

UNIQUE SELLING POINTS
- Closest Marine National Park to a capital city
- Iconic Gold Coast and Sunshine Coast beaches, and two of the three largest sand islands on Earth
- The best marine encounters - dolphins, turtles and dugongs
- Fresh seafood

CUSTOMERS WANT MORE
- Access from the city
- Attractions and accommodation
- Marine tours
- Indigenous Sea Country experiences

THE BAY, ISLANDS AND BEACHES

THE OPPORTUNITY
The Bay offers a marine experience that could rival the Great Barrier Reef and become a must-do tourism opportunity for the city that could convert an additional $1 billion every year in visitor spend.

UNIQUE SELLING POINTS
- Closest Marine National Park to a capital city
- Iconic Gold Coast and Sunshine Coast beaches, and two of the three largest sand islands on Earth
- The best marine encounters - dolphins, turtles and dugongs
- Fresh seafood

CUSTOMERS WANT MORE
- Access from the city
- Attractions and accommodation
- Marine tours
- Indigenous Sea Country experiences

If every visitor gets out on the river with a tourism product there is an opportunity to drive an extra $1.1 billion in visitor spend by 2031.

UNIQUE SELLING POINTS
- River-view bars and dining
- On-water activities (cruises, adventure, tours, etc)
- Investment in river access infrastructure provides a platform for new products

CUSTOMERS WANT MORE
- River cruise operators
- Quality dining experiences
- Connections to the bay, islands and upriver
- A quality seafood and produce market
THRIVING WITH INVESTMENT: MORE THAN $12 BILLION OF PROJECTS UNDERWAY.

Howard Smith Wharves ($200 million)
Will transform the riverfront under the iconic Story Bridge in 2019 with an Art Series Hotel, over-water bar and conference facility.

Brisbane Airport: Parallel Runway ($1.3 billion)
Due for completion in 2020, it will lift capacity to greater than Hong Kong or Singapore.

International Cruise Terminal ($158 million)
Will provide a dedicated berth for mega cruise ships, doubling the number of ships and due for completion in 2020.

Brisbane Live (Proposed - $2 billion)
A Business Case is underway for the proposed 17,000 seat arena that will significantly boost the city’s event capacity.

Queen’s Wharf ($3.6 billion)
On track to open in 2022, the 26ha development is expected to drive an additional 1.39 million visitors each year.

Brisbane Quarter ($1 billion)
Staged development that delivered the first new 5 star hotel in 20 years in the city, as well as office and residential developments.

Cross River Rail ($5.4 billion)
Will transform the transport network with turn-up-and-go services and deliver four new inner-city stations and development precincts.

Brisbane Metro ($994 million)
A high-frequency public transport system that will cut travel times, reduce congestion and improve linkages by 2023.
Brisbane City Council and the Queensland Government have worked in partnership to deliver the largest single uplift in new 4-5 star hotel room stock in the city’s history. Brisbane City Council introduced an infrastructure charges moratorium for luxury hotels and the State Government provided land and project incentives to bring forward investment in new hotels. From June 2014 to June 2018 a total of 18 new hotels (or 2,233 hotel rooms) have been delivered in Brisbane, with a further 12 hotel developments currently approved or under construction. Examples include the W Hotel developed by the Shayher Group as part of the Brisbane Quarter ($1 billion) on the State-owned Supreme Court site, Queen’s Wharf ($3 billion) on State land and Howard Smith Wharves ($200 million) on Council-owned land under the iconic Story Bridge.
A THRIVING INNOVATION ECOSYSTEM

World-leading research and development in health, robotics, food production and the start-up sector set the stage for a decade of rapid growth and investment in new sectors of the economy.

EASE OF DOING BUSINESS

With the largest population under the jurisdiction of one Local Government in Australia and the lowest payroll tax in Australia, Brisbane is the ideal capital city to do business.

VIBRANT, DIVERSE AND HEALTHY CITY

The city hosts global conferences and events every week, has the most sustainable transport infrastructure of any city in Australia, enjoys an active outdoor lifestyle and provides a community enriched with a proud Indigenous heritage and over 200 nationalities.

A SKILLED AND GROWING WORKFORCE

The city has one of the fastest growing populations in the OECD, a top 50 university globally, and an array of education providers helps Brisbane rank 21st in the world for student cities.

1.3 million in 2017

Annual international visitors: 1.3 million in 2017

6.5 million in 2017

Annual domestic visitors: 6.5 million in 2017

9.2% per annum growth in international visitors

7.5% per annum growth in domestic visitors

Major Events contributed over $190 million to June 2018

*Average annual growth from YE Dec 2014 to YE Dec 2017

Tourism Research Australia

12 BRISBANE: TOURISM INVESTMENT GUIDE.
Brisbane restaurants source fresh, healthy food grown in the fertile soil and seas on our doorstep. This makes the local produce ready for consumption for visitors and export.

With 160ha of green space within three kilometres of the city, national parks within a 15-minute drive, World Heritage Rainforests just over an hour away and the closest marine park to a capital city only 30 minutes away, Brisbane is a modern city in nature’s playground.

This means more days outside soaking up our natural settings and eco-experiences. Brisbane is ideally placed to capitalise on the trend towards healthy outdoor lifestyles and is a global leader in subtropical architectural design.

The city currently has 18,523 hotel rooms with an average occupancy rate of 77.5%

85,000 international students generated $3 billion in economic value to the region. Brisbane is ranked #21 for the best student cities in the world.
With its location in the Asia Pacific region, growth in airline capacity and its natural appeal, Brisbane is ideally positioned to experience significant increases in the volume of international and domestic overnight visitor arrivals.

The baseline scenario (see Figure 1 below) sees Brisbane grow at 4% per annum to a $10 billion overnight visitor economy in 2030.

Transformation projects worth more than $12 billion are under construction and set to drive significant visitation to Brisbane. Scenario One projects demand to drive an extra $2.3 billion per annum.

The construction of more than 1,400 new rooms in 2018 and 2019 (over 500,000 available room nights) creates the potential to increase average length of stay in Brisbane. Scenario Two could see the destination convert average length of stay by 0.8 nights in 2031 driving an extra $1.8 billion per annum in visitor spend.

Building on these increases, Scenario Three shows what is possible if the city creates new experiences that lift visitor expenditure per person by 5% above forecast with the potential to capture an additional $2.4 billion per annum in visitor spend.

Combined, these growth scenarios present a $6.5 billion growth potential by 2031, which would translate into growth across seven key experiences (see page 15).

*Based on the Tourism Forecasting Committee estimates to 2026.*
SEVEN KEY EXPERIENCES HAVE BEEN IDENTIFIED WITH GROWTH POTENTIAL FOR BRISBANE, ASSISTING BRISBANE TO ACHIEVE INCREASED VISITOR VOLUME AND VALUE WHILE ATTRACTING A BROAD RANGE OF VISITORS.

- History and Culture: $0.5 billion
- Food and Wine: $0.4 billion
- Aquatic and Coastal: $0.9 billion
- City-based attractions: $3.3 billion
- Sports and Adventure: $0.5 billion
- Natural experiences: $0.8 billion
- Wildlife experiences: $0.1 billion
BRISBANE EXPERIENCE ZONES.

Opportunities to create new visitor experiences exist across the eight local government authorities who are in partnership to deliver new products in the Experience Zones of the City, River, Bay, Islands and Beaches and the Hinterland. Brisbane provides a gateway to the Gold and Sunshine Coasts to offer a "best of Australia" experience for international visitors.

One hour to the Sunshine Coast
The Sunshine Coast offers a relaxed beach and hinterland experience that complements the Brisbane region, with major attractions (Australia Zoo and Sea Life Sunshine Coast), a natural beach experience and a mix of coastal and hinterland villages that provide an authentic Australian experience. The Sunshine Coast is also developing new ecotourism and culinary experiences.

One Hour to the Gold Coast
The Gold Coast offers a popular domestic and international visitor location with theme parks, beaches, a large accommodation stock and major conference venue. It complements Brisbane's capital city experience with an iconic Australian beach destination.

Brisbane's Visitor Experiences:

Aquatic and Coastal - the closest marine park to a capital city and the famous beaches of the Gold and Sunshine Coast within an hour's drive.

History and Culture - Experiences of the world’s oldest living culture in a contemporary setting.

Natural experiences - World Heritage Rainforest, marine parks and green space in easy reach of the city.

Wildlife encounters - wild experiences with koalas, kangaroos, dolphins, whales and manta rays as well as leading wildlife attractions known for conservation and hands-on visitor experiences.

City-based attractions - Australia’s most visited art gallery and a bustling river offering a unique view of the city.

Food and Wine - abundant fresh food and wine within an hour’s drive being delivered through modern dining and in edgy rooftop bars.

Sports and Adventure - An outdoor and active lifestyle and host to global sporting events.
Analysis of current visitor trends and participation in activities shows that Brisbane has a significant opportunity to grow the volume of visitors through new accommodation and transport infrastructure, and to significantly increase the conversion of existing visitors into overnight stays and support the creation of new visitor experiences.

Comparison of Brisbane to a range of international and domestic benchmark cities including Barcelona, Geneva and Melbourne shows it has the potential to:

Increase conversion of visitors passing through the destination from **28% to 32% for just 1 night** to bring an **extra 1 million visitor nights** in the region.

Increase the conversion of visitors into a new experience from **12% to 20%** to increase spend per day and further increase length of stay and deliver an **extra $2.3 billion** to the economy.

Address the lower average length of stay in the region by extending the **average trip by 0.8 nights** to generate an **extra 14 million visitor nights**.
Brisbane City Council’s economic development board, Brisbane Marketing, and the Department of Innovation, Tourism Industry Development and the Commonwealth Games provide a shared service for supporting projects that drive the economic value of the region.

**Included Services:**
The data used to prepare the Tourism Investment Guide can be interrogated by investors to support a project’s business case. Through the Tourism Investment Attraction team (details on back page) the investment model can provide insights on:

- forecast market demand for a wide range of new visitor experiences;
- market segmentation analysis by origin and the linkage of new experiences to the current market;
- estimated economic impact of new experiences including additional expenditure and jobs; and
- how new experiences fit with the experiences desired by the next generation of travellers.

Brisbane has previously supported tourism investment in infrastructure through a wide range of potential investment models including:

- public and private partnerships using competitive tender processes (such as the proposed Mt Coot-tha Zipline);
- market-led, innovative proposals involving government assets or access to rights (such as the proposed Brisbane Live);
- private sector investment using traditional development application processes and some investment incentives (primarily in hotel investment); and
- public sector investment by some and/or all levels of government (such as the Brisbane International Cruise Terminal).

Projects at an early stage of planning will require a preliminary business case to be considered for investment support. Refer to the Tourism Project Assistance pathway (over page) to see the service provided to potential investors in Brisbane.

“Brisbane is brilliantly positioned to sell to the world the things the world needs. The world needs education and medicine as well as fantastic visitor and amazing cultural experiences.”

Professor Greg Clark, Leading Global Urbanist
PROJECT REVIEW:
New tourism infrastructure projects will be considered for support if they deliver on the Vision for Brisbane: lift overnight visitor expenditure; increase our share of international visitors; and lift our profile as a global leisure destination.

PROPERTY SEARCH:
We can assist locating available land, including under-utilised State and Local Government land or commercial sites suitable for your development.

MARKET REVIEW:
We can identify the market potential of your project through to 2030, helping you to build a business case for your concept.

SITE TOURS:
Projects with an identified market demand and strong business case can access support for site visits including hosting, meetings and introductions.

SECURE PATHWAY:
The Queensland Government’s Market Led Proposals, and the Brisbane City Council’s Better Brisbane Proposals provide secure investment pathways that protect intellectual property and allow for exclusivity and partner investment for unique concepts.

INVESTMENT SUPPORT AND INCENTIVES:
A range of investment incentives exist for significant projects, including regional hotel investment incentives, and support with securing capital from our network of debt and equity advisors.
FOR MORE INFORMATION ON HOW WE CAN HELP GO TO WWW.INVESTBRISBANE.COM.AU/TOURISM