

DESTINATION
GOLDCOAST.TM

ACTION PLAN

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ACKNOWLEDGEMENT OF COUNTRY

Destination Gold Coast acknowledges the Traditional Custodians of the land on which we are situated, the Kombumerri families of the Yugambeh Language Region. We pay our respects to their Elders past, present, and emerging, and recognise their continuing connections to the lands, waters, and their extended communities throughout South East Queensland.

A MESSAGE FROM OUR CHAIR

Gold Coast tourism proudly boasts a vast ecosystem around it and is in fact an industry of industries. With more than 10,200 tourism related businesses here on the Gold Coast accounting for 1 in 6 Queensland tourism businesses, we are a critical connection to the visitor economy.

Our tourism industry has shown exceptional resilience and emerged strongly during 2022 with solid trading performance across the visitor economy. But we now face significant headwinds and there is uncertainty regarding the speed of normalisation of domestic and international travel patterns.

Reflected in the twelve months to December, which shows the first full year of visitor data since the pandemic and lockdowns, the Gold Coast benefited from exceptionally strong results due to pent-up demand for travel domestically.

The Gold Coast welcomed 11.4 million domestic overnight and day trip visitors who spent a record \$6.1 billion in the year-ending December. This included a record 2.3 million interstate visitors driven by record-breaking visitation from New South Wales.

Meanwhile, international leisure visitation is growing at a steady pace with visiting friends and relatives and education a major proportion of purpose for travel to Australia.

It is also encouraging to see business events are firmly embedding themselves in diaries around the world for the coming year and beyond as the Gold Coast solidifies its position as The Imagination Capital of Australia. The business events sector is critical to driving weekday visitation and flattening the demand curve, and we remain firmly entrenched in bidding for and securing leads that go on to generate new, repeat and multi-year opportunities for the city.

Destination Gold Coast continues to engage with both consumers and trade in key international markets including New Zealand, Malaysia, Japan, Singapore and beyond into South East Asia through regular tactical campaigns, in-market missions, and publicity opportunities to capitalise on direct access through Gold Coast and Brisbane airports.

It was pleasing to welcome AirAsia X's return to the Gold Coast after three long years in April as a direct result of the partnership between Destination Gold Coast, the City of Gold Coast, Gold Coast Airport and the Queensland Government through the Attracting Aviation and Investment Fund. The ongoing partnership with our airports is vital to giving the Gold Coast an edge in vying for access which has in recent months led to the procurement of Jetstar's Tokyo Narita-Gold Coast service, United Airlines' San Francisco-Brisbane service, Qantas' Tokyo Haneda-Brisbane service, and additional trans-Tasman flights with Air New Zealand.

Recent announcements by many of China's major airlines that they are re-establishing their routes to Australia is welcome news. The latest arrivals data shows that the number of Chinese visitors to Australia is rising, albeit slowly, and whilst we expect it to take some time for numbers to reach pre-pandemic levels, there is positive sentiment towards Australia and willingness to spend their discretionary income on travel after being closed for so long. We must do everything we can to generate demand from this important market.

We know there is still a way to go when it comes to international recovery and will continue to lead Team Gold Coast to rebuild services and unlock new growth opportunities through aviation hubs that would allow travel into the Gold Coast from other parts of Asia, India, Europe and North America.

The gratefully received surge in visitors converting their pent-up demand for travel is now returning to more normalised numbers. Our tourism industry is responding to the continuing changes in a highly dynamic external environment which is being impacted by cost-of-living increases, rising interest rates, changing consumer demand and taste, and increased competition globally.

There is still plenty of work to do in interstate and international markets and we remain laser-focused on the return to pre-pandemic levels. Ultimately, we must think outside of the box and continue to pursue new opportunities to support the growth of Gold Coast's visitor economy.

Coupled with the City of Gold Coast's creation of Experience Gold Coast – as the umbrella entity responsible for driving the diverse elements that make up the Gold Coast's visitor economy – Destination Gold Coast will play a critical role in driving our city's economic prosperity. I welcome the improved visitor economy co-ordination across arts and culture, international education, and events which Experience Gold Coast will provide, and look forward to working with Council and the transitional committee as the organisation is formed.

At Destination Gold Coast, we are sharply focused on the opportunities ahead including strengthening our weekday economy, swiftly rebuilding international

access, as well as launching a series of domestic campaigns to reacquaint Australians with a rejuvenated Gold Coast and to build new visit occasions. We are unequivocally committed to driving the rejuvenation of the tourism economy, supporting a sustainable economic future for the Gold Coast.

This Action Plan sets the blueprint for the next 12 months as Destination Gold Coast applies a long-term lens for tourism under Experience Gold Coast. Three strategic pillars underpin this - driving growth, industry leadership and destination strategy.

Our industry continues to demonstrate great resilience and a can-do attitude from all those that rely on tourism. Now, we look ahead with confidence to the future. Working together, I am confident that we can achieve our vision to establish the Gold Coast as Asia-Pacific's most dynamic and innovative holiday and business events destination.

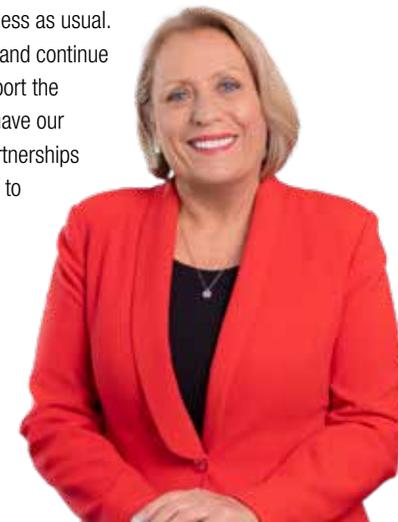
As South East Queensland looks forward to the 2032 Olympic and Paralympic Games, now is the time to ensure that the Gold Coast is well placed to renew tourism growth and fully capitalise on this generational opportunity. Since hosting the largest integrated para-sports program in Commonwealth Games history, our city is in a prime position to rebuild a stronger, more inclusive visitor economy of the future.

The Queensland Government's 'Towards Tourism 2032' visitor economy strategy has set a \$44 billion target in overnight visitor expenditure for the state. The Gold Coast represents a quarter of this which is approximately \$11 billion. These are bold targets, and we must acknowledge that sustaining high levels of growth over multi-year periods has previously been impacted by sudden and significant environmental and economic hurdles.

Gold Coast's future cannot be business as usual. Instead, we must think innovatively and continue to pursue new opportunities to support the growth of our visitor economy. We have our eyes towards the future and our partnerships and ability to collaborate will be key to sustaining this success.



ADRIENNE READINGS | CHAIR



TOURISM IS A MAJOR ECONOMIC DRIVER

\$45 BILLION

IN VISITOR EXPENDITURE
DURING THE 10 YEARS
2010-2019

\$526 MILLION

TAXES PER YEAR
(2019)

1 IN 6

OF QUEENSLAND'S
TOURISM BUSINESSES
(2021)

\$9,500

ANNUAL VISITOR
EXPENDITURE PER
RESIDENT (2021)

44,000 JOBS

(2019)

DISCLAIMER: All data presented in the report is sourced from the Australian Bureau of Statistics, Australian Tax Office and Tourism Research Australia's National and International Visitor Surveys, and Tourism Satellite Account, unless otherwise noted.

STATE OF THE INDUSTRY



ISOLETTO POOL CLUB



KEY TAKEAWAYS

- Total domestic overnight visitors in 2022 surged to 4.1 million, up from 3.2 million in 2021 and only marginally behind the 2019 total of 4.2 million.
- Visitor nights also increased substantially in 2022 to 15.5 million nights, an increase on the 11.2 million nights in 2021.
- The increase in visitors was driven largely by a surge in interstate visitors when state borders opened.
- This included a record 1.3 million visitors from New South Wales, up 2.1 per cent on 2019 in addition to 707,000 visitors from Victoria, up 10.8 per cent on 2019.
- The increase in interstate visitors also resulted in the increase in visitor nights to 15.5 million, due to their longer length of stay.
- Overnight visitor expenditure was also heavily influenced by a sustained increase over the year of the average daily room rate in the accommodation sector.
- Despite these strong results, the Gold Coast's share of Queensland's visits continues to decline. The Gold Coast performed well but other domestic destinations continue to grow at faster rates.

NOTE: International data for the year ending December 2022 has been produced by using immigration (administrative data) and incoming passenger card information while spend has been imputed based on spend characteristics from previous IVS interviews. As a result, Tourism Research Australia has recommended that data not be presented at the regional level until IVS interviews are fully reintroduced.

Please refer to Figure 1.2 and 1.3 within the Appendix for 10 year data trends.

CORE SECTOR PERFORMANCE

ACCOMMODATION

The accommodation sector on the Gold Coast had a very strong year in 2022 with the second highest average occupancy levels in the country (second only to Hobart). This was further strengthened with the highest average daily room rate in the country, 18% higher than the national average.

2022	2022	YOY% Change
Occupancy (%)	70.2%	38.9%
Average daily room rate (\$)	\$270.27	22.4%
Revenue per available room (\$)	\$189.83	69.9%

SOURCE: STR

It is worth reiterating that even with record domestic overnight visitation levels and Average Daily Rates (ADR), the Gold Coast's share of Queensland's visits continues to decline. The Gold Coast performed well but other domestic destinations continued to grow at faster rates.

The sector is expected to correct in mid to late 2023, with cost-of-living increases, rising interest rates, changing consumer demand and taste, and increased competition globally driving this.

Average occupancy for Good Friday and Easter Saturday 2023 reached 78.9% compared to 88.5% for the same time last year. ADR for the first week of the Easter holidays was \$377.72 compared to \$277.90 the week before - a 32% increase. The average ADR for the same week in 2021 was \$345.42 and \$215.93 in 2019.

AVIATION

Aviation recovery for the Gold Coast during 2022 was significant. Accelerating from a standing start in January 2022 to eclipsing 2019 inbound passenger numbers in the month of June.

	2022	YOY% Change
Domestic	2,775,832	171.7%
International	197,126	810.1%
Total	2,972,958	184.9%

SOURCE: BITRE

Whilst domestic movements continue to be strong, challenges remain with demand outweighing airline capacity and capability meaning increased airfares for travellers.

Across both domestic and international markets airlines are viewing this time as an 'opportunity cost' environment, where they will continue to change their network according to the routes that work best in terms of aircraft availability and mapping perspective, crewing and profitability position.

In 2023, DGC will continue to work with the City of Gold Coast, our airports, and the Queensland Government to secure maximum share of the \$200 million Attracting Aviation Investment Fund (AAIF).

EXPERIENCES

Anecdotal industry feedback suggests that the broad range of businesses that support the Gold Coast experience economy also benefited from the rapid return of interstate visitors in 2022.

Whilst the overall impacts of the pandemic were devastating, there were minimal losses in terms of overall operators within the sector.

The destination's major theme park and wildlife experiences were able to continue with \$82 million in investments to deliver new attractions within their respective offerings, giving visitors further reason to return to the Gold Coast once again.

Favourable weather conditions across the second half of 2022 and into early 2023 also benefited operators.

This sector is also expected to correct in 2023, with many operators eagerly awaiting the return of international travellers to counteract the potential slowdown in domestic visitors.

THE OUTLOOK IS POSITIVE, BUT THERE ARE STILL CHALLENGES AHEAD

**GLOBAL SKILLS
SHORTAGE**

**AVIATION
CAPACITY AND
COSTS**

**WEALTH
CONCERNS
REPLACING
HEALTH
CONCERNS**

**INCREASED
COMPETITION**

THE FAST RISE OF NEW
DESTINATIONS

**RATE OF
OUTBOUND
TRAVEL**

SURPASSING INBOUND
ARRIVALS

**DECLINING
MARKET SHARE**

(PARTICULARLY DOMESTIC)
NEEDS TO BE TURNED AROUND

**YIELD/SPEND
PER VISITOR**

HAS BEEN DECLINING
(DOMESTIC AND
INTERNATIONAL)

**BRAND AND
POSITIONING**

ISN'T DELIVERING THE CUT
THROUGH NECESSARY TO
DRIVE TURNAROUND

**VISITOR
SATISFACTION
CHALLENGES**

(REVIEWPRO)

**MARKETING
ON ITS OWN IS
UNLIKELY TO
BE ENOUGH**

PRODUCTS AND EXPERIENCES
NEED TO EVOLVE

SUN - THURS

IMPACT ON OCCUPANCY

**SMOOTHING
OUT OUR ANNUAL
VISITATION CYCLE**

OUR FUTURE CANNOT BE BUSINESS AS USUAL

Despite the challenges, the Gold Coast remains one of Australia's favourite holiday destinations, core products and experiences remain strong, but the Gold Coast visitor economy is at a critical juncture.

Figure 1 based on Butler's "Tourism Area Life Cycle" demonstrates this moment in time for the Gold Coast Destination Life Cycle and need for action.

The Gold Coast reached peak market share of holiday visitors before 2000. Over the intervening 20-year period, despite overall visitor expenditure continuing to increase, competitor destinations started to develop at a quicker pace; and interstate, intrastate and international competition expanded and matured, which have driven a sustained decline in market share for Queensland and the Gold Coast.

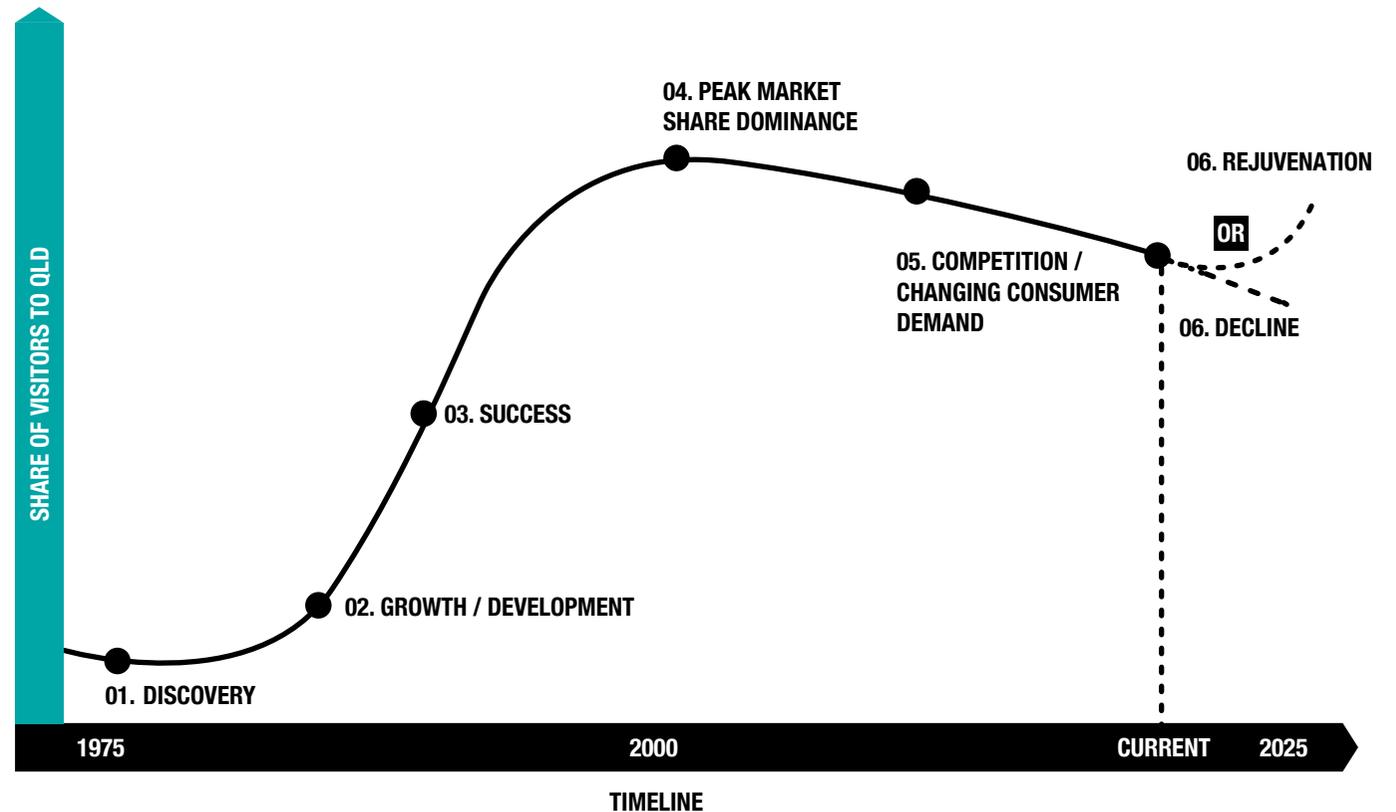
It is also important to note that even during 2022 when domestic visitation levels were high and record Average Daily Rates (ADR) were being recorded, the Gold Coast's share of Queensland's visits continued to decline. The Gold Coast performed well but other domestic destinations continued to grow at faster rates.

Without intervention and commitment to a renewed strategic direction and brand, a continuing decline in market share of visits is the most probable outcome.

An industry-wide commitment to a fresh approach is required if longer-term trends are to be reversed and a longer-term view towards capitalising on 2032 can provide this focus for reinvigoration.

2023/24 will see the start of this journey with renewed focus on many fronts. DGC stands ready to lead the tourism sector through this change including a seamless transition to Experience Gold Coast.

FIGURE 1.1: GOLD COAST DESTINATION LIFE CYCLE



Based on Butler's "Tourism Area Life Cycle"

Butler, R. W., 2011. Tourism Area Life Cycle, Contemporary Tourism Reviews (CTR), Oxford: Goodfellow Publishers Ltd

STRATEGIC DIRECTION



PURPOSE

TO DRIVE REJUVENATION OF THE TOURISM ECONOMY, SUPPORTING A SUSTAINABLE ECONOMIC FUTURE FOR THE GOLD COAST



VISION

TO BE ASIA-PACIFIC'S DESTINATION OF CHOICE FOR HOLIDAYMAKERS AND BUSINESS EVENTS

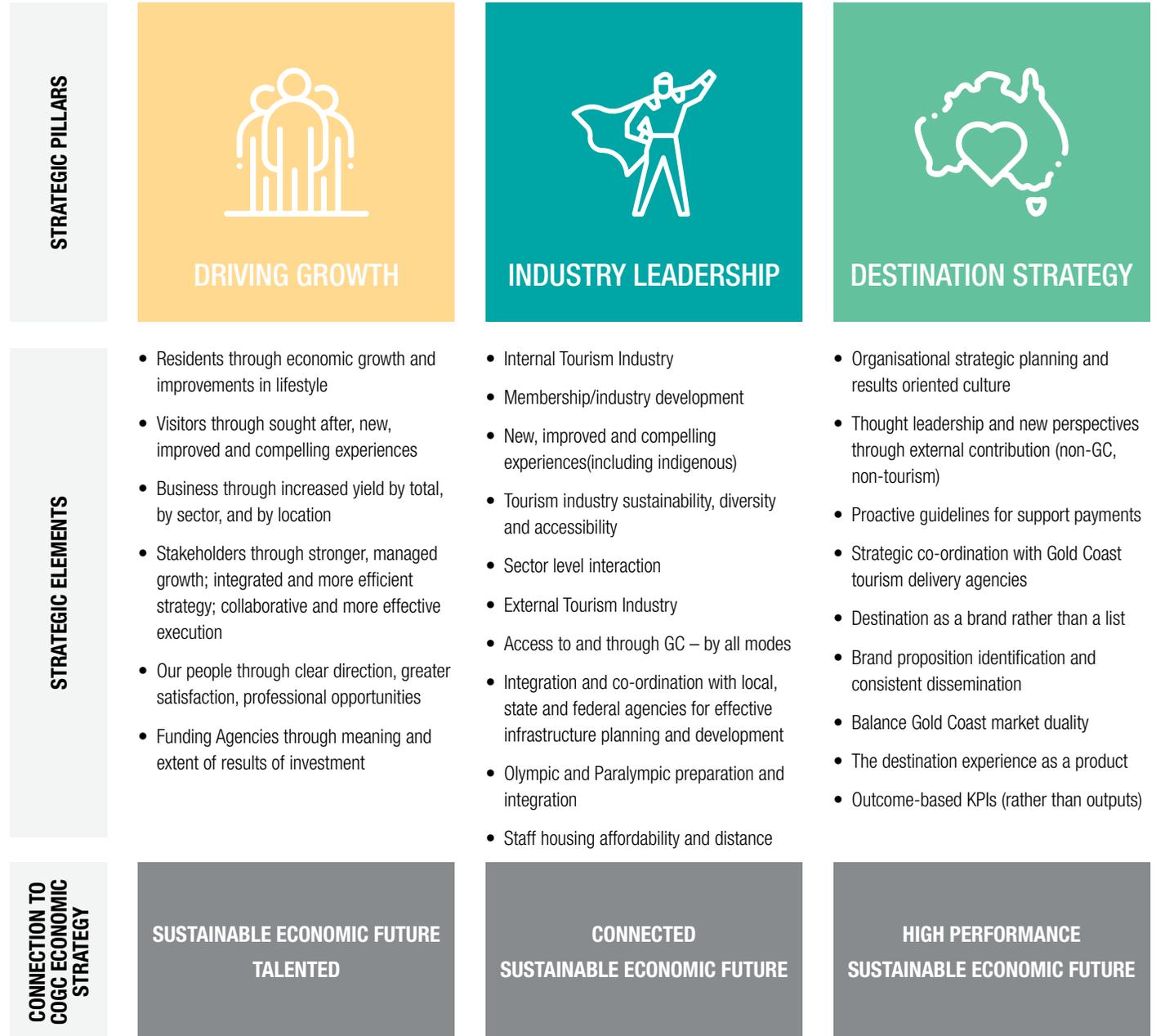


VALUES

IN DELIVERING OUR ROLE, DESTINATION GOLD COAST WILL BE GUIDED BY ORGANISATIONAL VALUES BASED ON ACCOUNTABILITY COLLABORATION AND TRUST

STRATEGIC APPROACH

DGC will take a clear stance in streamlining activities that better reflect the current state of play and alignment to the City's Economic Strategy rather than the past two years of the pandemic where the strategic pillars were underpinned by Rebuilding Visitation, Advocacy, Restoring Aviation Access and People and Culture.



2023/24 KEY PERFORMANCE INDICATORS

CURRENT KEY PERFORMANCE INDICATORS AS NOTED IN THE 2022/23 TO 2026/27 FUNDING AGREEMENT



INDUSTRY LEADERSHIP & ENGAGEMENT

- Tourism Employment = 39,000
- Stakeholder Satisfaction = 80%
- Grants Sourced for Industry = \$2 million
- Leads to Industry = 230,000
- New Aviation Seats Secured = 100,000
- Co-operative Marketing Funds Sourced = \$4 million



VISITATION

Total Visitor Numbers = 14,736,000

- Domestic Overnight Visitors = 4,504,000
- Day Trip Visitors = 9,257,000
- International Visitors = 975,000

Total Visitor Expenditure = \$5.9 billion

- Domestic Overnight Visitor Expenditure = \$3.8 billion
- Day trip Visitor Expenditure = \$900 million
- International Visitor Expenditure = \$1.2 billion

National Market Share of Total Visitor Expenditure = 4.1%



BUSINESS EVENTS

- Economic Impact of DGC Leads Won = \$100 million
- Economic Impact of DGC Leads to Industry = \$220 million
- Leads to BE Industry = 180

The 2023/24 key performance indicators noted above and as stated within the 2022/23 to 2026/27 funding agreement were established based on the following assumptions:

1. There would be very limited travel constraints in place domestically and internationally.
2. International access would be open at full capacity.
3. Macro-economic factors were consistent with low inflation and limited impact of a recession.

These incidents have constrained the markets within which DGC operates. As a result, below are several caveats that will impact visitation and associated performance indicators over the next 12 to 24 months:

- Intrastate visitors reached record levels during the pandemic due to geographic travel limitations, however with open state borders for more than a year, intrastate visitors have started returning to a normal travel profile.
- Visitor numbers from interstate augmented after the lifting of the lockdowns, these increases have adjusted as global travel options have returned.
- Total international travel, particularly long-haul, has been slower to recover than expected, with holiday travel even slower.



2023/24 PLANS ON A PAGE BY BUSINESS UNIT

FY24 POAP SUMMARY - STAKEHOLDER AND STRATEGY

STRATEGIC PILLARS			INITIATIVES	OPERATIONAL OBJECTIVE	STRATEGIC ELEMENT	BENEFIT
DRIVING GROWTH	INDUSTRY LEADERSHIP	DESTINATION STRATEGY	INDUSTRY LEADERSHIP, EXPERIENCE DESIGN AND DEVELOPMENT	Strengthen the tourism network with an inclusive approach, embracing sustainability and development of emerging and established demand driving tourism opportunities	<ul style="list-style-type: none"> Thought leadership and partnerships + member engagement Industry development in Sustainability, Indigenous and Accessibility 	<ul style="list-style-type: none"> Support the tourism sector by aligning efforts, increasing effectiveness of our partners. Improve Best of Queensland results (& ReviewPro scores)
DRIVING GROWTH	INDUSTRY LEADERSHIP	DESTINATION STRATEGY	COLLABORATE WITH INDUSTRY AND GOVERNMENT AGENCIES TO DRIVE BEST PRACTICE	Engage stakeholders at the right level and frequency to strengthen the reputation of our industry and secure sustainable support at a business, civic and political level	<ul style="list-style-type: none"> Industry development in Sustainability, Accessibility and Indigenous Collaboration with industry, sectors and local, state and federal agencies 	<ul style="list-style-type: none"> Support sustainable economic growth within the tourism industry with opportunities for the future
DRIVING GROWTH		DESTINATION STRATEGY	INTEGRATE INTERNATIONAL AND DOMESTIC MEDIA OPPORTUNITIES	Solidify the Gold Coast as a premier destination across Family, Arts and Culture, Sustainability, Indigenous and Accessible experiences	<ul style="list-style-type: none"> Advocacy and influence Thought leadership and partnerships + member engagement 	<ul style="list-style-type: none"> Increased earned, owned and paid media opportunities, combining traditional and new forms of media
	INDUSTRY LEADERSHIP	DESTINATION STRATEGY	INDUSTRY ADVOCACY AND COMMUNICATION	Provide leadership in making locally responsive and informed decisions that position DGC as the go-to voice for the visitor economy	<ul style="list-style-type: none"> Advocacy and influence Thought leadership and partnerships + member engagement 	<ul style="list-style-type: none"> Increase advocacy and industry leadership along with member satisfaction
DRIVING GROWTH		DESTINATION STRATEGY	DEVELOP GUIDELINES FOR AAIF REQUEST ASSESSMENTS	Drive growth of visitation to the Gold Coast via strategic airline partnerships in collaboration with Gold Coast and Brisbane Airport's utilising the AAIF fund	<ul style="list-style-type: none"> Aviation attraction and support guidelines Prioritise markets to drive high yield travel 	<ul style="list-style-type: none"> Establish a baseline for DGC to be strategic in assessing approaches by airlines, and drive growth
DRIVING GROWTH		DESTINATION STRATEGY	INTERNATIONAL TRADE, BRAND AND DEVELOPMENT	Rebuild international visitation to the Gold Coast, focusing on off peak and shoulder periods to flatten the demand curve	<ul style="list-style-type: none"> Aviation attraction and support guidelines Prioritise markets to drive high yield travel 	<ul style="list-style-type: none"> Drive and target re-attraction of international visitation via priority markets

FY24 POAP SUMMARY - DESTINATION MARKETING

STRATEGIC PILLARS			PROGRAMS	OPERATIONAL OBJECTIVE	STRATEGIC ELEMENT	BENEFIT
	INDUSTRY LEADERSHIP	DESTINATION STRATEGY	BRAND PROPOSITION IDENTIFICATION AND CONSISTENT DISSEMINATION	Develop a marketing ecosystem that provides clarity on a new a positioning and a new voice to express through communications	<ul style="list-style-type: none"> Gold Coast destination brand development 	<ul style="list-style-type: none"> Be distinctive (as a DMO), be unified (as a Co-Op), and be linked (to the CoGC)
DRIVING GROWTH		DESTINATION STRATEGY	INCREASE HOLIDAY VISITATION INTERSTATE (SYD AND MEL)	Reset perceptions to maintain Travelling With Kids (TWIKs) share and grow Travelling Without Kids (TWOKs) visit penetration through establishing new visit occasions	<ul style="list-style-type: none"> Gold Coast destination brand development 	<ul style="list-style-type: none"> Increase in visit preference, primary visitation driver
DRIVING GROWTH		DESTINATION STRATEGY	INCREASE HOLIDAY VISITATION INTRASTATE (BNE)	Convert Brisbane day trips to overnight stays. Reset perceptions, leverage MEGC event schedule and Work From Home opportunities	<ul style="list-style-type: none"> Increase holiday yield 	<ul style="list-style-type: none"> Increase in visit preference, grow overnight expenditure and secure more Sunday to Thursday visits
DRIVING GROWTH			WEAPONISE DGC MARKETING ASSETS (WWW AND DATABASE)	Stabilise performance and bring a commercial focus (\$ impact) to DGC's digital assets	<ul style="list-style-type: none"> Industry and stakeholder marketing integration and collaboration 	<ul style="list-style-type: none"> Heightened commercial performance of our assets
DRIVING GROWTH			BROADEN FAMILS AND INFLUENCER PROGRAM	Generate 3rd party publicity to showcase destination strengths	<ul style="list-style-type: none"> Increase holiday yield 	<ul style="list-style-type: none"> Increase in visit preference
	INDUSTRY LEADERSHIP	DESTINATION STRATEGY	MARKETING COUNSEL	Establish a working group across operators and DGC for sharing information, market insight, thought leadership and alignment on support periods	<ul style="list-style-type: none"> Industry and stakeholder marketing integration and collaboration 	<ul style="list-style-type: none"> Strategic and executorial alignment across DGC and operator groups

FY24 POAP SUMMARY - BUSINESS EVENTS

STRATEGIC PILLARS			PROGRAMS	OPERATIONAL OBJECTIVE	STRATEGIC ELEMENT	BENEFIT
DRIVING GROWTH			GROW MARKET SHARE IN KEY INDUSTRY SECTORS	Identify build and incubate opportunities within key industry sectors (Health Education, Screen, Sport and Engineering) as well as deliver a tactical proactive bidding plan	<ul style="list-style-type: none"> Business through increased yield by total, by sector, and by location Visitors through sought after, new, improved experiences Organisational strategic planning and results oriented culture Strategic co-ordination with Gold Coast tourism delivery agencies 	<ul style="list-style-type: none"> Increase domestic market share Improve national perception of the Gold Coast as a credible business event destination
	INDUSTRY LEADERSHIP	DESTINATION STRATEGY	LEVERAGE CITY WIDE NETWORKS	Improve business events strategic partnerships through BE Connected program and developing long term agreements with key academic institutions	<ul style="list-style-type: none"> Organisational strategic planning and results oriented culture Thought leadership and new perspectives through external contribution (non-tourism) 	<ul style="list-style-type: none"> Develop a pipeline of bid leaders that will support the association bidding process Generate leads by referral by creating opportunities to promote the Gold Coast to key decision makers Increased profile of the Gold Coast as a business hub within the local business community.
DRIVING GROWTH	INDUSTRY LEADERSHIP		INCREASE CITY CAPABILITY	Connect the Gold Coast business events community to improve confirmed events engagement and increase Customer Lifetime Value (CLV)	<ul style="list-style-type: none"> Industry development, new and improved experiences 	<ul style="list-style-type: none"> By developing a TEAM Gold Coast program with city stakeholders and key BE suppliers, the Gold Coast will make hosting business events seamless
DRIVING GROWTH		DESTINATION STRATEGY	EVOLVE BUSINESS DEVELOPMENT MODEL	This activity will provide the tools for DGC to align assessment criteria with the city, for bidding and subvention allocations, allowing the team to focus their energy on attracting high value business events to the city at the most optimum period	<ul style="list-style-type: none"> Business through increased yield by total, by sector, and by location Residents through economic growth and improvements in lifestyle 	<ul style="list-style-type: none"> Conversion rate and increase in conversion YOY Measured by improvement in total number of bids commenced/total number of bids confirmed
DRIVING GROWTH			INTERNATIONAL BUSINESS EVENT ATTRACTION	Rebuild reputation and destination profile in key international markets to increase lead generation and grow international business event pipeline	<ul style="list-style-type: none"> Visitors through sought after, new, improved experiences Business through increased yield by total, by sector, and by location 	<ul style="list-style-type: none"> Increase and maintain international sales activities in core market (Asia) Leverage partnership opportunities with Tourism Australia and Tourism and Events Queensland Align with DGC leisure activities in market for maximum impact

FY24 POAP SUMMARY - BUSINESS CAPABILITY

STRATEGIC PILLARS			PROGRAMS	OPERATIONAL OBJECTIVE	STRATEGIC ELEMENT	BENEFIT
DRIVING GROWTH		DESTINATION STRATEGY	BUILD A STRATEGIC PLANNING AND REVIEW CAPABILITY	Build a performance monitoring and continuous learning cycle, and evolving strategy	<ul style="list-style-type: none"> Organisational strategic planning and results orientated culture People satisfaction and professional development. 	<ul style="list-style-type: none"> A clear strategy at all levels internally and externally, with resources optimised and focused on measurable results
	INDUSTRY LEADERSHIP	DESTINATION STRATEGY	EVOLVE AND STRENGTHEN THE DGC GOVERNANCE FRAMEWORK	Attain an industry best-practice standard of governance, suitably tailored to DGC and its environment	<ul style="list-style-type: none"> Tourism industry diversity, accessibility and sustainability Organisation strategic planning and results orientated culture 	<ul style="list-style-type: none"> An ESG Framework and a revised Business Continuity and Disaster Recovery policy will enhance DGC's ability to lead the industry and destination strategy with a comprehensive governance framework
DRIVING GROWTH		DESTINATION STRATEGY	EXPLOIT THE NEW IT INFRASTRUCTURE AND STRENGTHEN CYBER DEFENCES	A simple, robust architecture that is secure, efficient, enabling staff to be more productive and innovative	<ul style="list-style-type: none"> People satisfaction and professional development Organisational strategic planning and results orientated culture 	<ul style="list-style-type: none"> Enhanced information security, collaboration, information sharing, enabling DGC to lead the industry and develop its thought leadership capability
DRIVING GROWTH		DESTINATION STRATEGY	CAPABILITY AND LEADERSHIP DEVELOPMENT	A high performing leadership team focused on growing capabilities in self and others	<ul style="list-style-type: none"> Tourism industry diversity, accessibility and sustainability Organisation strategic planning and results orientated culture 	<ul style="list-style-type: none"> A broader skill enabling new ways of working. A highly effective leadership team driving capability development
DRIVING GROWTH		DESTINATION STRATEGY	BUILDING INNOVATION AND AGILITY INTO CULTURE	Enable an innovative performance culture and an environment that facilitates change	<ul style="list-style-type: none"> People satisfaction and professional opportunities Thought leadership 	<ul style="list-style-type: none"> Increased diversity of thought and enhanced collaboration, building resilience and cohesion through change

ORGANISATIONAL ALIGNMENT WILL BRING TO LIFE NEW OPPORTUNITIES



EXPERIENCE
GOLDCOAST.™

CITY OF
GOLDCOAST.™

DESTINATION
GOLDCOAST.™

MAJOR EVENTS
GOLDCOAST.

STUDY
GOLDCOAST.™

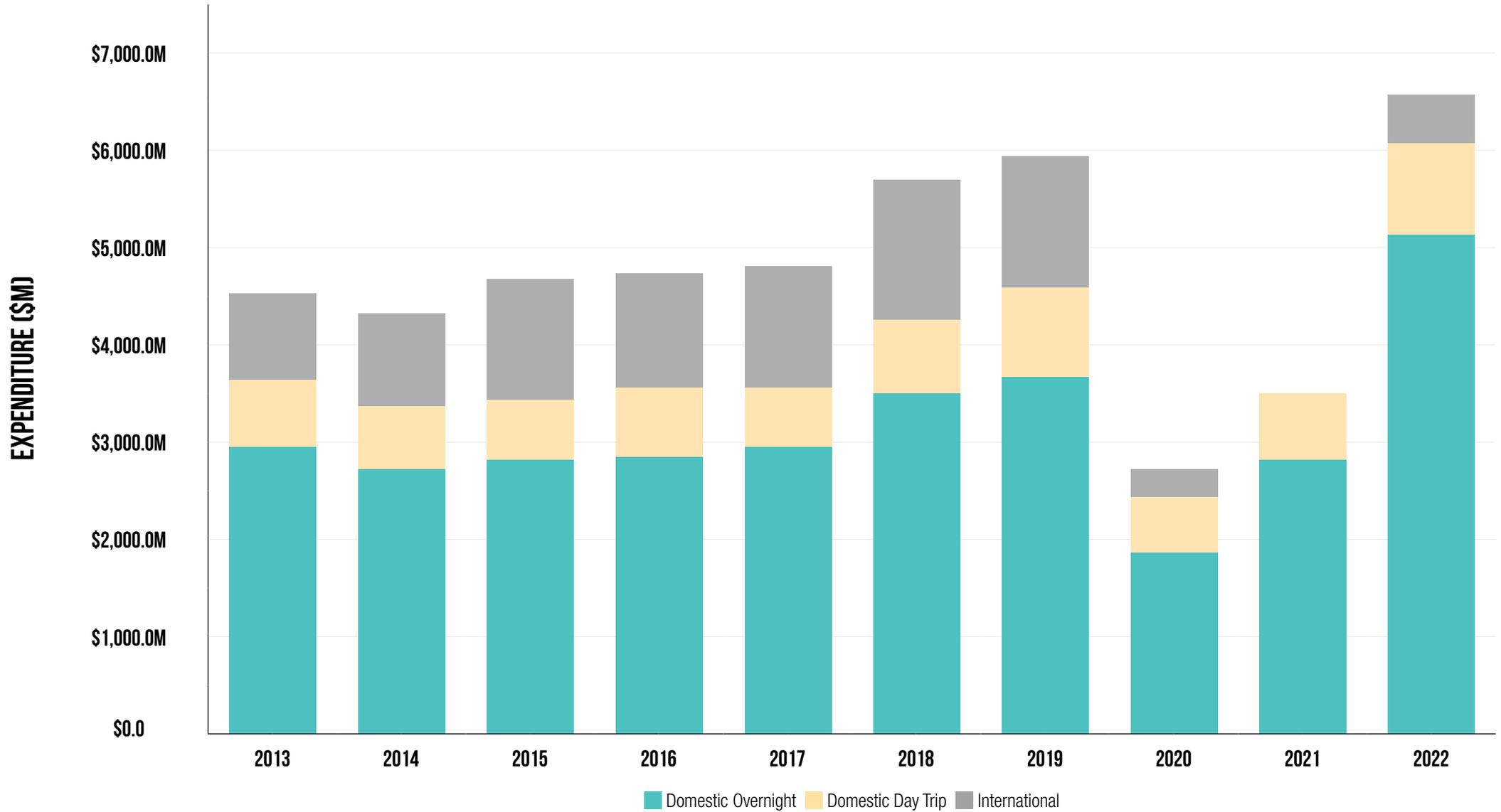
H O T A HOME OF THE ARTS

placemakers*
GOLD COAST



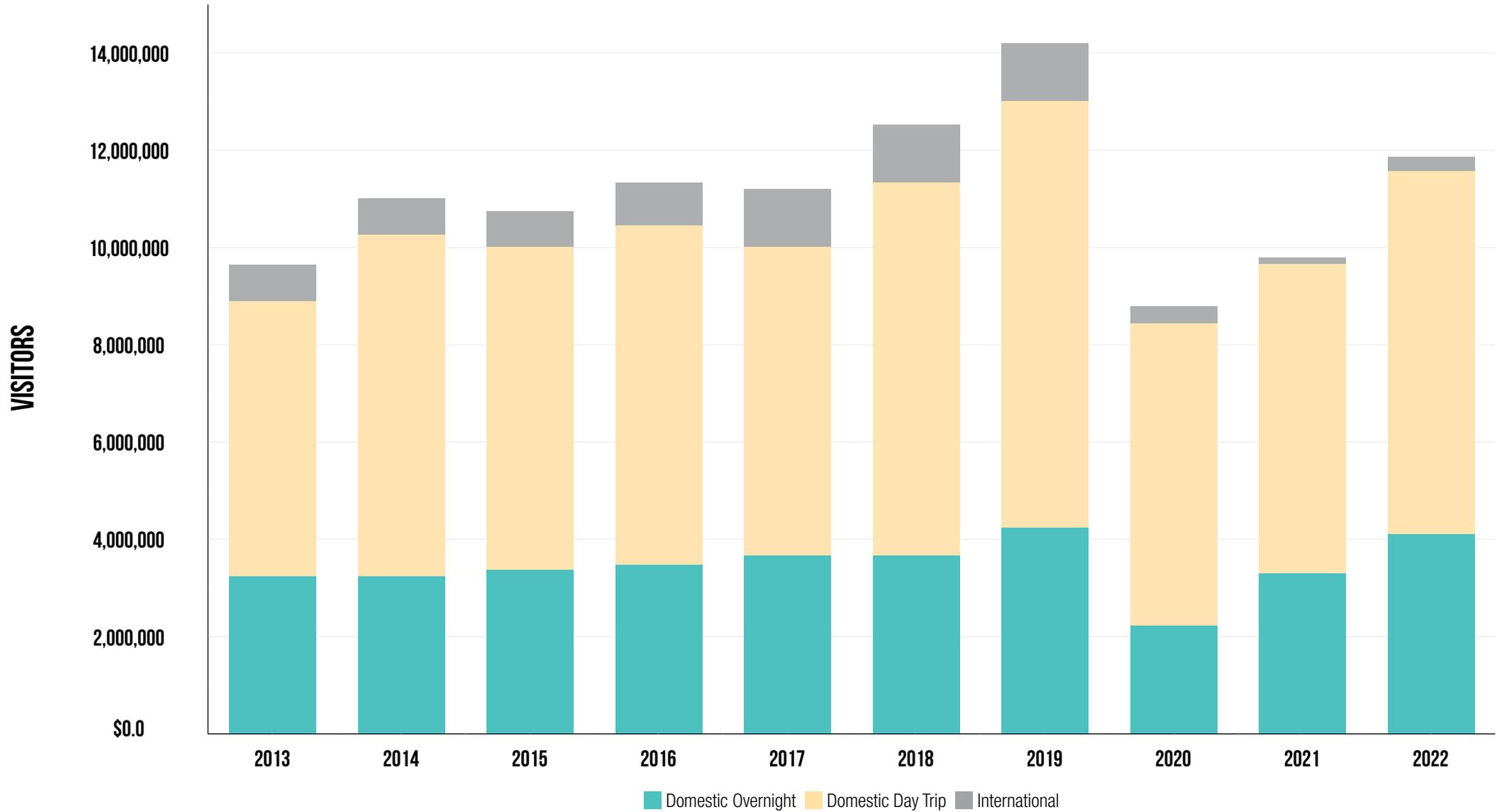
APPENDIX

FIGURE 1.2 – 10 YEAR GOLD COAST TOTAL VISITOR EXPENDITURE



Source: NVS/IVS, TRA 2023

FIGURE 1.3 – 10 YEAR GOLD COAST TOTAL VISITORS



Source: NVS/IVS, TRA 2023