

2032 Olympic and Paralympic Games

Value Proposition Assessment Executive Summary



Queensland
Government

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2032 Olympic and Paralympic Games Value Proposition Assessment Executive Summary

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ISBN 978-1-921960-18-5

Table of contents

1	Executive Summary	1
1.1	Introduction	1
1.2	Background and context	1
1.3	The indicative 2032 Games Master Plan.....	4
1.4	Transport.....	8
1.5	Accommodation	9
1.6	Legacy	10
1.7	Dates of the Games	13
1.8	Government services	14
1.9	Budgets and benefits assessment.....	15
1.10	Stakeholder engagement and support.....	18
1.11	Conclusions and next steps	19

THE VALUE PROPOSITION ASSESSMENT – KEY FINDINGS

The Value Proposition Assessment (VPA) has been prepared by the State's 2032 Taskforce, with input and guidance from relevant Queensland Government agencies, Australian and local government representatives and technical consultants. The assessment was prepared to inform the Queensland Government on the value proposition, including costs, benefits and legacy opportunities of hosting the 2032 Olympic and Paralympic Games (the Games).

Key findings include:

- Hosting the 2032 Games is feasible with financial and operational services support from all three levels of government.
- Organising Committee costs for the Olympic and Paralympic Games of \$4.45 billion could be delivered at no cost to the State, taking into account International Olympic Committee (IOC) contributions and domestic revenues.
- The quantifiable economic benefits for Queensland have been estimated at around \$7.4 billion. In addition, there are a range of qualitative social and community benefits that the Games could deliver over a potential two-decade window of opportunity.
- The Games could have a positive impact on job creation, supporting around 130,000 direct jobs. In addition to direct jobs, there will be tens of thousands of indirect jobs supported by the Games including over 10,000 tourism induced jobs in the Games year alone.
- The tourism and trade opportunities the Games could deliver are significant. This includes an estimated uplift of around \$20.2 billion in international visitor expenditure between 2020 and 2036 and increased export opportunities of up to \$8.6 billion.
- In addition to whole-of-State benefits, regions outside of South East Queensland (SEQ) could also benefit from a range of opportunities, including:
 - Games hosting opportunities (Cairns, Townsville and the Whitsundays)
 - pre-Games training, Torch Relay and cultural festivals
 - increased visitor expenditure with around 50 per cent of international travellers dispersing to the regions (an uplift of approximately \$10 billion)procurement and supply chain opportunities.
- A high percentage of Games venues - approximately 80 per cent - already exist or can be delivered through temporary overlay solutions. A number of options, aligned with long term sport and entertainment venue planning in Brisbane, continue to be explored for the Athletics and Ceremonies venue.
- Queensland's climate and world-class facilities provide an ideal environment for elite athletes to train and perform at their best.
- The recent Olympic Agenda 2020, *New Norm* reforms provide a basis for Queensland to host the Olympic and Paralympic Games in a way which reduces costs and ensures flexibility in delivery to the benefit of the host.
- The 2032 Games and the SEQ City Deal currently under development provide a catalytic opportunity for all three levels of Government to agree on key priorities including transport infrastructure projects.
- The next stage involves finalising the master plan, securing funding and operational service agreements with all levels of government and confirming the associated costs to the State.

1 Executive Summary

1.1 Introduction

1.1.1 THE OVERARCHING VALUE PROPOSITION

The Queensland Government, led by the 2032 Taskforce within the Department of the Premier and Cabinet, was tasked with undertaking a comprehensive Value Proposition Assessment (VPA) to determine the feasibility, or otherwise, of hosting the Olympic and Paralympic Games in 2032.

The decision to assess the costs and benefits of a Games proposition follows recent reforms undertaken by the International Olympic Committee (IOC), known as the *New Norm*, welcoming the possibility of more innovative, cost-effective and sustainable Games concepts. In-depth engagement has taken place across all levels of Government and with both the Australian Olympic Committee (AOC) and the IOC.

The analysis has determined that hosting a Games in 2032 is feasible, with the support of all three levels of government, and that the benefits outweigh the costs.

Factors supporting a Candidature for the 2032 Olympic and Paralympic Games in Queensland include:

- the SEQ City Deal objectives regarding investment in transport infrastructure are aligned to Games delivery requirements. A high percentage of venues – approximately 80 per cent – already exist or can be delivered through temporary solutions, and a range of options may be pursued to meet remaining venue requirements with long-term legacy benefits for the State
- the *New Norm* approach also involves a significant commitment by the IOC to funding the operating costs of the Games (approximately USD 1.8 billion), enabling the Games Organising Committee activities to be delivered on a cost-neutral basis
- the Games has the ability to deliver significant whole-of-State benefits over a two-decade window pre-, during and post the Games. Benefits include, but are not limited to, a significant tourism uplift, opening up new export opportunities, supply chain opportunities for Queensland businesses and a range of initiatives that inspire healthy, active and engaged communities
- engagement conducted to date indicates there is a high level of public support for hosting the Games from Queenslanders across the State.

The VPA undertaken by the Queensland Government builds on a series of feasibility studies undertaken over a four-year period by the Council of Mayors South East Queensland (CoMSEQ). It also draws on recent experience in major-event delivery from the Gold Coast 2018 Commonwealth Games (GC2018).

A future Candidature would require a strong partnership with the Australian Government and local governments, including funding commitments for operational costs.

1.2 Background and context

1.2.1 THE OLYMPIC MOVEMENT

The Olympic Movement is governed by the IOC, a not-for-profit independent international organisation committed to building a better world through sport. The AOC is the National Olympic Committee (NOC) in Australia, chaired by the senior IOC Member in Australia, Mr John Coates AC. NOCs are responsible for supervising the selection of bid cities in their country and recommending and endorsing a city to the IOC as a candidate to host the Olympic Games.

The IOC Session is the general meeting of the members of the IOC and is the body responsible for electing Games host cities, on the advice of the responsible Commission overseeing the Candidature process. Historically, the bidding process has commenced nine years prior to the Games, with the hosting rights awarded two years later.

1.2.2 RECENT REFORMS AND IMPLICATIONS

In response to a trend of increasing costs experienced by Games bidding and hosting nations, the IOC embarked on a series of reforms to safeguard the future of the Olympic Games.

The first of these, *Olympic Agenda 2020*, was adopted unanimously by the IOC Session in December 2014, and provided the strategic roadmap for the future of the Olympic Movement. Among its 40 recommendations, three related specifically to the revised bidding process. These placed sustainability at the centre of the Games hosting proposition and enabled a more flexible solution that contemplates maximum use of existing venues and a relaxation of some of the associated venue characteristics.

The *New Norm* initiatives announced in February 2018 build on the Olympic Agenda 2020 road map and provide strategic and tactical proposals to redefine the Candidature process, thereby reducing costs for cities and providing them with greater support and more flexibility to develop their Games concepts. It is characterised by ongoing, open dialogue with the cities, enabling continuous improvement of their Olympic Games project.

The *New Norm* also comprises "an ambitious set of 118 reforms that reimagines how the Olympic Games are delivered", providing host cities with increased flexibility to design their Games solution to achieve maximum alignment with the long-term plans of the city and region.

1.2.3 THE NEW CANDIDATURE PROCESS

For a potential proposition from Queensland, these reforms make possible:

- **A more distributed model**

Subject to meeting the IOC's enduring rules and by-laws, a Games concept in Queensland could involve a regional approach focused on three primary Games venue 'hubs' in Greater Brisbane, the Gold Coast and Sunshine Coast. This would enable maximum use of existing venues, including those developed or renovated for the Gold Coast 2018 Commonwealth Games, in complete alignment with the long-term legacy needs of the region.

- **A revised Candidature timeline**

The new process encourages a dialogue phase that can begin at any time, well before the 'traditional' two-year Candidature phase (which previously commenced nine years prior to the date of the proposed Games). There has been a strong indication from the IOC that they are prepared to consider awarding the right to host the Games earlier than in the past. For Queensland, this could happen as early as 2021 or 2022, allowing for more than a decade prior to the Games to maximise the benefits of being a future host.

1.2.4 BACKGROUND

1.2.4.1 STUDIES BY THE COUNCIL OF MAYORS SOUTH EAST QUEENSLAND (COMSEQ)

The VPA draws on the body of work developed by the CoMSEQ over the four-year period from 2015 to 2019. Published in March 2019, the *CoMSEQ Feasibility Study* and a parallel transport study (the *SEQ People Mass Movement Study*) assessed the feasibility of hosting the 2032 Olympic and Paralympic Games in South East Queensland.

The *CoMSEQ Feasibility Study* concluded that hosting the Games in South East Queensland was feasible and was likely to generate significant opportunity for substantial economic and community benefits. The report contended that the Games could serve to catalyse and/or accelerate the delivery of long-term regional priority projects for the region, resulting in a net economic gain for Queensland as a whole, given SEQ's important gateway role.

It concluded by suggesting that the Games impacts are optimised when any incremental infrastructure projects are underpinned by compelling legacy plans. Hence, the key to a successful indicative 2032 Games Master Plan is its complete alignment with legacy needs.

Value Proposition Assessment Executive Summary

1.2.4.2 THE GOLD COAST 2018 COMMONWEALTH GAMES EXPERIENCE

The *Gold Coast 2018 Commonwealth Games Post-Games Report* identified many legacy benefits of hosting the Games, concluding the Games:

- **grew Queensland's economy**, generating a forecast \$2.5 billion boost to Queensland's Gross State Product, including a \$1.8 billion economic boost to the Gold Coast (over the '4+1+4 period', being four years before, during and four years after the Games)
- **boosted tourism**, generating more than 1.3 million visitors in the lead-up to, during and after the Games, who spent more than \$1.1 billion in Queensland
- **promoted trade**, translating to additional future exports and foreign direct investment estimated at \$840 million over the four years post-Games
- **made a positive contribution to Aboriginal and Torres Strait Islander people**, with contracts worth more than \$14 million awarded to Aboriginal and Torres Strait Islander businesses
- **promoted sport and healthy lifestyles**, involving more than 200,000 participants in more than 100 healthy and active lifestyle initiatives.

1.2.5 THE FIVE KEY PRINCIPLES

Reflecting on the IOC's new direction and drawing on the lessons of the *CoMSEQ Feasibility Study* and the experience of the Gold Coast 2018 Commonwealth Games, five guiding principles have been developed to shape the Queensland Games proposal.

Principle 1 – Legacy-led

Legacy arising from and catalysed by the Games opportunity must provide the rationale for Queensland to pursue a Candidature.

The potential benefits arising from the Games would be unlocked only through a deliberate and structured approach to legacy planning.

Compelling, measurable legacy outcomes and programs have become a key 'currency' for Games candidate hosts. As Queensland seeks to demonstrate a uniquely sustainable 2032 Games concept, its legacy programs represent the tangible symbols of that proposition. Equally, the legacy proposal must underpin Queensland's unique strategic proposition to the IOC if they are ultimately to be convinced to award the Games to Queensland. For the purposes of the VPA, legacy is defined as the realisation of benefits before, during and after the Games.

Principle 2 – Two decades of opportunity

The Games must act as a catalytic event with a defined timeframe to accelerate two decades of opportunity beyond a few weeks of sport.

Connected to the first principle, the Games must enable positive transformational change across the State using the Games platform as a once-in-a-lifetime chance to galvanise effort over a two-decade window of opportunity (being the 10 years before and the 10 years following the Games).

By harnessing the momentum and scale of a medium-term Olympic Games hosting opportunity with the focus of an immovable start date, the Games can act as an accelerator of the State's priorities for the next two decades.

Principle 3 – A Games inclusive of all Queenslanders

The Games must be capable of generating benefits for all Queenslanders.

To be successful and well supported, demonstrable benefits need to be achieved across the State through a range of Games-related, Games-induced and Games-inspired programs, including:

Value Proposition Assessment Executive Summary

- capacity and capability enhancement, including business investment and supply chain opportunities and the profiling of Queensland produce
- destination marketing for tourism and event attraction
- opportunities to profile and celebrate First Nations culture and experiences
- torch relay, cultural festivals and pre-Games training
- physical activity mass participation events
- volunteering and training.

An ongoing commitment to deliver, communicate and measure these programs would be crucial to demonstrating the statewide benefits for Queensland communities.

Principle 4 – Fiscally responsible

A responsible approach must be taken to Games budgeting, drawing on the IOC's *New Norm* philosophy to find innovative delivery strategies that minimise net expenditure.

As evidenced by its recent *Olympic Agenda 2020* and *New Norm* reforms, the IOC is committed to making a significant financial contribution (of not less than USD 1.8 billion) and reducing the net cost imposed to Games hosts. It is the IOC's clear intention that the operational costs of hosting the Games for the Organising Committee are entirely offset by Games revenues from the IOC, as well as locally-generated ticketing, sponsorship and other revenues.

The IOC has also expressed a willingness to consider any innovations that can result in cost savings, even where these might imply justifiable reductions in levels of service. Hence, Queensland is committed to the inclusion of capital expenditure proposals only where a strong legacy purpose is served and where there is complete alignment with long-term plans.

Principle 5 – A partnership between three levels of government

A successful Games Candidature (and successful Games) will only be possible with the complete alignment and financial and operational support from the three levels of government.

This VPA has been developed with in-kind support and input by the partner agencies – the Australian Government, local governments (including CoMSEQ) and the Australian Olympic Committee.

The continued alignment and partnership approach of the partners would be crucial to:

- formulate the best possible Candidature with greatest legacy impact
- ensure related funding responsibilities are appropriately shared (including the SEQ City Deal expected to be finalised in June 2020)
- continue to present a unified and cohesive partnership to the IOC that embodies a low-risk hosting option.

1.3 The indicative 2032 Games Master Plan

1.3.1 OVERVIEW AND PRINCIPLES

At the heart of every Olympic and Paralympic Games is a master plan that integrates competition and training venues, villages and accommodation, media facilities and other key non-competition venues and provides the backbone for the overall Games concept. This results in more than 50 sites across a city/region, which need to be connected by a resilient and efficient transport network consisting of public and road-based transport, to allow for athletes, officials, media and spectators to be moved efficiently during the Games, as well as ongoing background traffic.

The indicative 2032 Games Master Plan is based on maximising existing Queensland facilities and plans. As a result, approximately 80 per cent of the proposed venues are existing or proposed to be temporary. This compares favourably with recent Games hosts (Rio 2016 – 70 per cent and Tokyo 2020 – 71 per cent). Existing facilities are optimised and new facilities are proposed only to respond to community needs arising from the projected growth of the region or legacy opportunities.

Five principles have informed development of the indicative 2032 Games Master Plan:

- **Embracing the *New Norm*** – optimising the use of existing venues with feasible capacities and delivering a regional model whilst maintaining revenue targets and the core IOC principles and priorities.
- **A legacy-led Master Plan** – focused on delivering community legacy outcomes, maximising environment and sustainability outcomes and alignment with state, local and Australian Government policies for infrastructure development.
- **An outstanding Games on a stunning stage** – showcasing Queensland with the athlete experience at the heart of the concept.
- **Olympic stakeholder alignment** – constructive engagement and consultation with the IOC, the International Federations (IFs) and Olympic Broadcasting Services (OBS).
- **Operational feasibility** – alignment of the indicative 2032 Games Master Plan with existing and planned transport projects, accommodation hubs and spectator population centres.

1.3.2 WHOLE-OF-QUEENSLAND IMPACT

The 2032 Games concept contemplates three compact connected venue hubs, or 'zones', in South East Queensland, being Greater Brisbane, the Gold Coast and Sunshine Coast.

Collectively these three zones would host all 28 Olympic program sports, would allow for selected additional optional sports, and would provide 38 of the Games venues. This offers optimal competition conditions supported by attractive transport service levels for athletes.

Regional locations and opportunities continue to be explored. They may include Football preliminaries in Toowoomba, Townsville and Cairns and Keel Boat Sailing in the Whitsundays, with additional opportunities still to be determined. This extends the hosting opportunity inland and along the east coast, achieving a statewide footprint and maximising showcasing opportunities for Queensland's iconic tourist attractions. It also invites a statewide festival during the Games. The indicative 2032 Games Master Plan strategy enables regional engagement and participation, reinforcing a range of statewide legacy initiatives.

Comprehensive whole-of-Queensland activation is anticipated through pre-Games training and pre-Games testing and preparation competitions and major event opportunities across the State, as well as an innovative Olympic celebration and showcase concept that can be delivered across a wide range of regional Queensland centres.

Surfing, Skateboarding and Sport Climbing are additional sports for Tokyo 2020 and Paris 2024 and could offer excellent showcasing opportunities in Queensland. These sports would be considered following the IOC's review of the Tokyo 2020 Games.

1.3.3 INDICATIVE 2032 GAMES MASTER PLAN

The specific features of the indicative 2032 Games Master Plan are currently as follows:

- 10 venues and 17 sports/disciplines would be located within 5km of the Brisbane CBD.
- Competition venues are distributed across 11 separate Queensland council areas, providing legacy benefits across the region and State, with additional regional opportunities for pre-Games training and festival/live sites.
- There are considerable opportunities to showcase the unique and spectacular Queensland environment through the strategic location of outdoor sports.
- The concept is aligned with existing and planned transport infrastructure.

The current master plan venue footprint is 43 venues, with the final number dependent on concluding the hosting strategy for football, basketball and volleyball preliminaries and optimising venue sharing opportunities. Of the 43, 18 are currently located outside Brisbane, reflecting the Queensland Government's legacy and engagement objectives while maintaining appropriate travel times for athletes and supporting their unique Games experience including access to the main Olympic Village.

1.3.4 PARALYMPIC GAMES

The indicative 2032 Paralympic Games Master Plan presents a compact and spectacular Games in high quality sport venues and would not require additional venues or non-competition venues. The venue audit process confirmed that existing and newly constructed venues in the SEQ region have been designed with a high level of accessibility for users, including spectator accommodation. Some existing venues may require accessibility upgrades.

1.3.5 LEGACY CONSIDERATIONS

The development of the indicative 2032 Games Master Plan has focused on legacy, with a view to ensuring sustainable venue solutions and delivering social benefits to local communities. This has been achieved through the following approach:

- utilisation of existing infrastructure where possible, including creative solutions for temporary venues across the region to minimise the need for new sport venues
- alignment with key Queensland Government agencies (including the Department of Housing and Public Works and Stadiums Queensland) to ensure venue upgrades and new venues are consistent with planned projects and policies related to sport infrastructure development
- engagement with local councils to ensure alignment with respect to facility needs and siting opportunities
- development of new venues, such as the 'Active Community Hub' concept, which repurposes venues during Games time through temporary overlay, ensuring flexible multi-purpose spaces for legacy which can be effectively activated for a range of sports and other activities post-Games.

1.3.5.1 VENUES CURRENTLY UNDER CONSIDERATION

- **Athletics and Ceremonies Venue**

While previous Olympic Games stadiums have traditionally had seating capacities of 80,000 to 100,000, the IOC's *New Norm* provides flexibility with a possibility to reduce the Athletics venue requirement to approximately 50,000 seats. There is also the possibility to separate Athletics and Ceremonies should this be a viable and cost-effective option. A number of options are available for both Athletics and Ceremonies and are currently under consideration. In all cases the long term legacy needs of Brisbane will determine any additional or replacement venue investments. Games requirements can be met within this context.

- **Active Community Hubs (Indoor venues)**

The use of existing indoor venues across SEQ is optimised in the indicative 2032 Games Master Plan. This results in the allowances for ongoing sport and community use of some venues and presents the opportunity to develop approximately five indoor venues for a range of indoor sports aligned with long term growth.

Through engagement with local councils and Queensland Government agencies, the proposed concept is to develop 'Active Community Hubs' similar to the Coomera Indoor Sports Centre model (built for the Gold Coast 2018 Commonwealth Games with capacity for temporary seating of 7500) which has proven to be a commercially sustainable and socially successful model for the City of Gold Coast and local community. In legacy mode, each venue would provide an eight to ten court indoor sports facility for selected communities.

The indicative 2032 Games Master Plan proposes the use of these 'Active Community Hubs', distributed across the region in accordance with Queensland Government and local council policy to generate social benefit in target areas. Locations of the venues are subject to finalisation.

- **Rowing Venue**

Queensland does not currently have a suitable international standard Rowing course to meet Games operational requirements. Options are being reviewed to establish the cost and feasibility of a rowing facility which would meet both Games and legacy needs.

- **Canoe Slalom Venue**

There is currently no venue for Canoe Slalom in Queensland. Two possible options have been identified and are currently under assessment through advanced business case development.

- **Mountain Bike Venue**

Options have been identified and are currently under assessment.

1.3.6 VILLAGES

1.3.6.1 OLYMPIC AND PARALYMPIC VILLAGES

The Olympic and Paralympic Village (the Village) is the home for athletes and team officials during the Games and a key part of the Games experience. The total footprint required for the Village is approximately 40 hectares, taking into account residential buildings, temporary support areas and provision of parking.

It is generally accepted that the requirements can be achieved through modification of legacy residential units, including the deferral of kitchens and installation of temporary bedrooms where possible. As a consequence, it is normal to see an average of five and a half to six beds per residential unit, dependent on the legacy mix of unit types.

The following solution is proposed:

- **Brisbane Olympic and Paralympic Village (approximately 14,000 beds)**

The Brisbane Olympic Village would be located in Brisbane at an inner-city location and could service all venues in the Brisbane Zone, which potentially includes venues in Moreton Bay, Ipswich, Redland and Logan. Early analysis indicates that the development can support the delivery of legacy housing solutions across a range of key sectors including market housing, aged care, worker/build to rent and affordable housing, supplemented by hotel or serviced apartment accommodation.

- **Gold Coast Satellite Village (approximately 2000 beds)**

A secondary Olympic Village, providing a full village experience, could be located at the Gold Coast given the number of athletes competing in that zone and the nature of these competitions. Analysis is being undertaken to determine the most cost-effective solution for this village ensuring alignment with future legacy needs for housing or other accommodation.

- **Sunshine Coast Satellite Accommodation (approximately 600 beds)**

A Day Village (hotel style accommodation) and Satellite Accommodation hub could be located at the Sunshine Coast, with the majority of those athletes accommodated in the Brisbane Village and travelling up for the day or duration of their competition schedule.

- **Other Satellite Accommodation (approximately 600 beds)**

Football and some sailing athletes competing in other cities would be accommodated in hotels in their respective locations.

There is potential for delivery partnerships with the private sector which could be explored should Queensland be successful in securing the Games.

1.3.6.2 MEDIA VILLAGE

The use of village-style accommodation provides operationally efficient solutions for the media stakeholder group, while making more commercial accommodation available for spectators. In addition, media village arrangements provide a more cost effective and efficient media transport system.

1.3.7 KEY NON-COMPETITION VENUES

1.3.7.1 INTERNATIONAL BROADCAST CENTRE

A key non-competition facility for the Games is the International Broadcast Centre (IBC), the primary broadcast facility within the host city region for the production of Games coverage and workplace to approximately 15,000 broadcast production personnel. The location of the IBC and associated development model options are subject to ongoing analysis.

The indicative 2032 Games Master Plan also identifies:

- potential remote temporary studio precincts at the Gold Coast and Sunshine Coast
- a reduced residual requirement for a 30,000 sqm space in Brisbane that could be delivered through the use of relocatable 'serviced shell' structures to accommodate the requisite technical fit out. These structures could be relocated post Games to provide additional community hub modules of 5000 - 10,000 sqm for regional Queensland.

1.3.7.2 MAIN PRESS CENTRE

The Main Press Centre (MPC) is the workplace for approximately 3700 accredited press and photographers during the Games, providing key services, workspace, agency office areas and a transport hub. The proposed location for the MPC is the Brisbane Convention and Exhibition Centre (BCEC) which has fit-for-purpose high quality space, is proximate to a major public transport hub and is within walking distance of the CBD and South Bank accommodation.

Additional showcasing and legacy opportunities exist through the provision of non-accredited media centres in iconic regional locations in South East Queensland and the regions.

1.4 Transport

1.4.1 SEQ TRANSPORT INFRASTRUCTURE IN 2032

SEQ is in transition from a region with distinct cities, towns and settlements to a more integrated region, and is expected to grow by 1.9 million people in the next 25 years.

Events of the magnitude of the Olympic Games can act as a catalyst to accelerate investment in infrastructure such as transport in the host city or region, leaving a lasting and positive legacy on connectivity, commuting, passenger convenience, safety and sustainability.

A robust transport strategy is required that leverages existing transport strategic plans and aspirations. Existing SEQ transport infrastructure plans were used to develop potential scenarios that would provide appropriate levels of transport services for the 2032 Games. Importantly these are transport projects required for SEQ regardless of the 2032 Games.

The Games proposal and the SEQ City Deal, currently under development, provides an opportunity for all three levels of Government to agree on key priorities including funding for SEQ transport infrastructure projects, either through the SEQ City Deal or alternative partnership funding agreements.

1.4.2 GAMES FAMILY TRANSPORT

The Organising Committee for the Olympic Games (OCOG) would have responsibility for the provision of safe, reliable, efficient and comfortable Games Family transport services, which comprise the following three elements:

- **Games Family transport services**

Dedicated fleets of buses, cars and minivans could be used to deliver services to the key Games stakeholders (athletes and team officials, media, technical officials and marketing partners).

- **Implementation of a Games Route Network (GRN)**

The GRN is a network of roads that connects key Games locations and enables comfortable Games client travel times and efficient vehicle flows. It relies on the use of exclusive (Games only) lanes, shared lanes (with public transport vehicles) and mixed lanes.

- **Transport management strategies**

These include the implementation of appropriate traffic measures to manage Games and background traffic, the implementation of robust intelligent transport systems and a targeted Travel Demand Management (TDM) program to re-time, reduce, re-route and re-mode traffic and encourage public transport use.

Taking these strategies into account and based on the transport infrastructure that will be in place by 2032, initial analysis suggests that favourable travel times for athletes and other key stakeholders could be achieved.

1.4.3 SPECTATOR AND WORKFORCE TRANSPORT

Spectators and workforce could use the 2032 SEQ public transport networks, including special Games park and ride/shuttle systems and active transport. Smart ticketing could enable spectators and workforce to travel free to venues on public transport (conditions to be determined) using contactless cards, smartphones and wearable devices.

This could lead to a positive change in the mobility habits of SEQ residents and visitors towards increased use of efficient, sustainable, accessible and cost-efficient public transport. This positive change has been observed in all previous hosts that have invested in and promoted public transport in advance of the Games.

Initial analysis of the capacity of existing and planned public transport systems and their proximity to proposed 2032 venues suggests that around 50 per cent of trips to venues would occur on the enhanced public transport network with the balance relying on event shuttles / park and ride services or active transport, taxi, rideshare and private coach.

1.4.4 ARRIVALS AND DEPARTURES

Brisbane Airport would be the main gateway airport for the 2032 Games, while the Gold Coast and Sunshine Coast airports would be important secondary facilities. All three airports are delivering significant investment programs and have the capacity to meet Games time demand.

1.5 Accommodation

1.5.1 GAMES ACCOMMODATION REQUIREMENTS

The assessment has shown Queensland can meet the requirements through a range of options including hotels, serviced apartments and Airbnb, which is now a worldwide Olympic Partner (through to 2028).

This includes 41,000 rooms for Games stakeholders including 18,000 for media and broadcasters. A further 40,000 rooms are required for spectators (25,000) and workers (15,000) supporting the delivery of the Games.

Total SEQ accommodation inventory (comprising hotels, serviced apartments and holiday parks) is currently just over 60,000 rooms. At current rates of growth, it is expected this number could rise to 70,000 rooms by 2032.

The accommodation inventory could be supplemented at Games time through options such as:

- **Village-style developments**

Village-style accommodation could provide operationally efficient solutions for stakeholders such as the media. Queensland could also leverage village-style developments to deliver new housing infrastructure to meet the needs of Queensland's growing population. Diverse housing options, tailored to meet the needs of local communities, would help to foster social inclusion and provide opportunities for economic participation.

- **Cruise ships**

A potential temporary accommodation solution option that has been used during previous Games for marketing partners is the use of cruise ships. These could be located at the Brisbane International Cruise Terminal and if necessary, the Port of Brisbane dock.

- **Airbnb listings**

Airbnb 2019 data (sourced from Airbnb and STR Global) indicates that there are nearly 18,000 Airbnb listings in Brisbane, Sunshine Coast and Gold Coast, many of which could be utilised for spectators. The IOC has recently signed Airbnb as a major sponsor, announcing that the partnership would give "community residents the opportunity to earn extra income by providing accommodation and local experiences to visiting fans, athletes and other members of the Olympic Movement".¹

- **Additional accommodation solutions**

These solutions could include holiday parks, school boarding houses, student housing or temporary / modular housing.

1.6 Legacy

1.6.1 THE OVERARCHING LEGACY PROPOSITION

At the most fundamental level, the Games proposition should be legacy led. The new IOC procedures and an extended lead time enable a focus on a Games solution that can deliver a broad range of benefits. Over a sustained twenty-year period, an integrated and effectively implemented Games legacy program could:

- deliver a range of economic, community and sustainability benefits across the whole of Queensland
- act as an amplifier of the State's policy priorities including *Our Future State: Advancing Queensland's Priorities*
- be tailored to individual regions to meet priority local needs and deliver on regional strategic objectives
- be structured to leverage a partnership approach that enables support from multiple partners, harnessing the momentum of being a Games host.

To be effective for a potential Games Candidature, the legacy proposition must:

- be authentic and aligned with the vision for the Candidature and its unique selling proposition
- demonstrate how the Games would contribute as measured by specific, legacy outcomes and programs
- support an environmentally, socially and economically positive Games
- deliver sustainability outcomes on a broader front nationally and internationally, meeting or exceeding IOC expectations.

¹ IOC press release. (2019). Available at <https://www.olympic.org/news/ioc-and-airbnb-announce-major-global-olympic-partnership>

1.6.2 OVERVIEW OF THE KEY PROGRAMS AND OUTCOMES

From a wide range of options explored, three overarching themes have been identified representing the most valuable legacy concepts:

- **Prosperity: Jobs and skills.** Positioning Queensland to prosper in the economy and work of the future.
- **Participation: Healthier, inclusive communities.** Creating a healthier and more inclusive Queensland with engaged and connected communities.
- **Planning: Queensland lifestyle.** Liveability as a competitive advantage for the State.

These themes are considered to offer the best synergies between the strategic priorities of Queensland, and those of international Olympic stakeholders. The initiatives outlined under these themes have been identified as potential opportunities subject to further stakeholder consultation and support.

1.6.2.1 THEME 1 - PROSPERITY: JOBS AND SKILLS

Positioning Queensland to prosper in the economy and work of the future

- **Job creation**
 - The Games could have a positive impact on job creation, supporting around 130,000 direct jobs. In addition to direct jobs, there will be tens of thousands of indirect jobs supported by the Games including over 10,000 tourism induced jobs in the Games year alone.
- **Tourism opportunities**
 - \$20.2 billion increase by 2036 in overnight international visitor expenditure in Queensland (TEQ data) through a Candidature and Games in Queensland.
 - More than 50 per cent of this expenditure could be expected to be dispersed throughout regional Queensland (based on current dispersal profile).
 - Significant major event pipeline opportunities, including 45 events across Olympic disciplines that could be proactively pursued for Queensland as part of a strategic program.
- **Trade and investment opportunities**
 - Games-driven uplift of 0.2 per cent to 0.4 per cent in export revenues to Queensland, equating to a possible further \$4.3 billion to \$8.6 billion increase in investment.
 - Catalyst for new market development in emerging innovation sectors.
 - Target emerging competitive advantage areas for SEQ, such as precision healthcare, advanced agriculture and data-driven urban management.
- **Knowledge and service sector skills development opportunities**
 - Skill gaps could be matched with dedicated training programs, developed and delivered in partnership with a 2032 Olympic and Paralympic Games volunteer program.
- **Procurement and supply chain opportunities**
 - The Games would provide significant supply chain opportunities for Queensland businesses, in particular 'small and medium enterprises' (SMEs).
 - Games procurement volumes would generate unprecedented demand and the long lead time offers opportunities for innovative suppliers to generate both windfall sales and sustainable capability, driving ongoing opportunities.
 - A 'Small Business Collective' could be created to give small businesses the knowledge and opportunities to tender for Olympic contracts, opening opportunities for them to access trade and export markets post-Games.

- **Innovation precincts strategy**
 - Create a highly functioning network of business innovation precincts across SEQ and Queensland, utilising Games global technology partners and worldwide ICT networks (similar to the 22@Barcelona innovation precinct, which was a major 1992 Games legacy project).
- **Regional capability opportunities (key examples)**
 - Explore renewable energy solutions for Games venues and transport using hydrogen and world-leading lithium-ion batteries manufactured in Townsville (working with QUT).
 - Showcase Queensland's virtual healthcare capabilities by delivering services for Games athletes in the Olympic village, with capability developed by healthcare teams in Cairns and Townsville.
 - Provide healthy and sustainable food for Games clients showcasing Queensland's fresh produce and sourced from world-leading advanced agriculture solutions developed across regional Queensland.

1.6.2.2 THEME 2 - PARTICIPATION: HEALTHIER, INCLUSIVE COMMUNITIES

Creating a healthier and more inclusive Queensland with engaged and connected communities

- **Physical literacy**
 - Optimise the Queensland Government's *Activate! Queensland 2019-2029* and the Australian Government's Sport 2030 Plan in partnership with local councils, the AOC and IOC, to deliver a range of benefits including progress toward achieving community healthy weight targets over a ten-year period.
- **Inclusive connected communities**
 - Use the Olympic and Paralympic brands to enhance Queensland's welcoming reputation to inspire a more cohesive and inclusive Queensland.
- **Active Community Hubs**
 - Deliver legacy 'Active Community Hubs' as outlined in the indicative 2032 Games Master Plan to provide facilities that could support multiple needs of Queensland's rapidly growing communities and inspire the next generation of athletes.
- **Aboriginal and Torres Strait Islander partnerships**
 - Provide a platform that further recognises, respects and celebrates First Nations Peoples and embeds this principle in Games planning and delivery.
 - Implement a Reconciliation Action Plan for an Olympic Games to deliver legacy outcomes for First Nations Peoples, including programs to support Indigenous sporting performance, tourism, education, employment and training, procurement, health, art and culture and Indigenous knowledge as an innovation asset.
- **Precision healthcare**
 - Harness Queensland's leading advanced healthcare capabilities to offer cutting-edge Games time services, which could be used as a model for broader application in preventative, personalised patient care supported by advanced technology.
- **Urban design for healthy living**
 - Accelerate and strengthen the Healthy People, Healthy Places initiative that would use intelligent urban design to enable design features that support community engagement and social cohesion to be included in the planning and delivery of the built environment, active travel routes and public transport.
- **Queensland Cultural Olympiad**
 - Stage an unprecedented statewide festival to showcase Queensland stories, communicating its rich and ancient cultural heritage and contemporary practice to the world, while inspiring local and national pride in our cultural achievements.

1.6.2.3 THEME 3 - PLANNING: QUEENSLAND LIFESTYLE

Liveability as a competitive advantage for the State

- **Legacy social and affordable housing**
 - Capitalise on Games accommodation requirements to catalyse the development of social and affordable housing to meet the needs of Queensland's growing population.
- **Models and way of working**
 - The Games could enable key stakeholders to develop collaborative ways of working, supported by leading intelligent urban design capability. This would help position SEQ as the most liveable place in the world by 2040 and provide a competitive advantage for the State.
- **SEQ City Deal Opportunity**
 - Key SEQ City Deal objectives are aligned with the 2032 Games proposition, including connectivity, jobs and skills generations, liveability and sustainability and housing and planning.
- **Making Queensland Australia's events state**
 - The proposed indicative 2032 Games Master Plan offers a chance to bring Queensland's capital to life by simultaneously lighting up the city around connected dynamic entertainment precincts that enable it to be activated year-round for all genres of major event for decades to come.
- **Accessibility**
 - Ensure accessibility is a continued focus of Queensland's future urban planning.

1.6.3 ENVIRONMENT AND SUSTAINABILITY

Harnessing the Olympic Games sustainability platform could drive Queensland's sustainability agenda. Stimulating new standards and innovation, the Games could provide a focal point for strategies that bring together expertise, industry and the community to address climate change and waste. These initiatives would provide a benchmark for Queensland and Australia, supporting long-term objectives.

Specific opportunities would be identified including using the Games to showcase sustainability initiatives and eco-tourism opportunities.

A focus on key Queensland sector capabilities in areas such as renewable and distributed energy resources to meet Games green energy requirements would enhance market opportunities given the global focus generated by the Games, including across investors, industry and potential markets.

1.7 Dates of the Games

The IOC Charter states that the dates of the Olympic Games are determined by the IOC Executive Board. The duration of the Olympic Games is not to exceed 16 days. It is assumed the IOC-defined window would be 15 July to 31 August 2032. The proposed dates would require agreement by the IOC in the future.

It is critical to stage the Olympic Games during school holidays to enable:

- reduced baseload traffic
- reduced load on public transport
- availability of school buses that could be used for Games purposes
- availability of student accommodation
- availability of students and teachers for volunteer programs.

Initial discussions with the Department of Education (DoE) yielded two preferred possible holiday windows during the 2032 school year that would allow the Olympic Games to be conducted within the IOC defined period. Taking these dates into account, as well as local and international sporting calendars and weather conditions, the preferred dates for the Games are:

Value Proposition Assessment Executive Summary

- **Olympic Games** – from Friday 23 July to Sunday 8 August 2032
- **Paralympic Games** – from Tuesday 24 August to Sunday 5 September 2032.

Ongoing consultation is required with DoE, relevant education stakeholders and key international sporting bodies to confirm the proposed Games window and associated requirements regarding school term dates.

1.8 Government services

The successful planning and delivery of the Games would be enabled through strong partnerships between the three tiers of government, the Organising Committee for the Olympic Games (OCOG), the AOC and IOC.

Given Queensland and Australia's track record of delivering successful major sporting, business and cultural events, the government service requirements are well understood by the responsible agencies. The scale and unique operating environment of the Games would require the provision of some additional services to meet Games requirements. This elevated level of government service delivery provides an opportunity to enhance specific services for longer-term community benefit.

Should Queensland be successful in obtaining the rights to host the 2032 Games, the State Government would work collaboratively with the Australian and local governments to appropriately plan, budget for and deliver the required services.

1.8.1 QUEENSLAND GOVERNMENT SERVICES

Following is an indicative summary of the key services to be delivered by Queensland Government agencies in support of the Games:

- **Queensland Police Service (QPS)** - safety and security services
- **Queensland Health (QH)** - emergency health care and public health services, major event coordination and health emergency response
- **Queensland Ambulance Service (QAS)** - ambulance response services including emergency and non-emergency pre-hospital patient care and transport services
- **Queensland Fire and Emergency Services (QFES)** - fire and rescue, emergency management and disaster mitigation programs and services
- **Department of Agriculture and Fisheries (DAF)** - biosecurity (including quarantine) and fisheries services
- **Department of Environment and Science (DES)** - support projects to maximise the environmental, climate related and sustainability outcomes of the Games.
- **Department of Transport and Main Roads (DTMR)** – public transport services and transport coordination for the Games.

Importantly, the consultation process highlighted significant efficiency outcomes, derived from the lessons of GC2018, which could be realised across the identified delivery agencies should Queensland host the Games.

1.8.2 FEDERAL GOVERNMENT SERVICES

As a key delivery partner, the Australian Government would play a critical role in supporting the planning and delivery of the Games through provision of a range of services including, but not limited to:

- customs and immigration services
- national security, intelligence and counter-terrorism support
- background checks
- dignitary management
- air space control
- emergency aviation support

Value Proposition Assessment Executive Summary

- importation services
- taxation services
- national freight network access
- quarantine and biosecurity services
- medical services including international doctor accreditation and anti-doping
- telecommunications network infrastructure and frequency management
- dedicated Games business and planning units.

Consultation has been undertaken with the Department of Health (Office for Sport) and the Department of Home Affairs to consider the scope of Australian Government services required to support the delivery of the Games with no significant issues raised.

1.8.3 LOCAL GOVERNMENT SERVICES

Local Government Areas across Queensland would be required to deliver specific, Games-related management and operational services, broadly defined as 'City Operations'. The scope of the services would be dependent on the level of additional activity within their region.

Consultation has been undertaken with key event cities and city operations services that may be delivered by LGAs includes:

- cleaning and waste
- environment and sustainability
- resident services
- business continuity and services
- look and feel
- wayfinding and signage
- accessibility
- overlay
- live and festival sites / celebration sites (Olympics Live)
- cultural program
- Olympic Torch Relay.

1.9 Budgets and benefits assessment

1.9.1 BUDGETS

Delivering the 2032 Games requires both operational funding and capital expenditure. There are a number of budget categories that have been considered to determine the cost of hosting the 2032 Games. All costs are in 2020 AUD dollars.

1.9.1.1 THE ORGANISING COMMITTEE FOR THE OLYMPIC GAMES (OCOG) BUDGET

The OCOG budget refers to the operational budget required to deliver the Olympic and Paralympic Games. The roles and responsibilities of the OCOG are defined in the Olympic Charter and are further outlined in the Host Contract. The OCOG revenues include contributions from the IOC (approximately USD 1.8 billion) related to Broadcast Agreements and The Olympic Partners program, domestic sponsors, licensing and merchandising and ticket sales.

Based on current forecasts, the OCOG budget of \$4.45 billion to deliver the Olympic and Paralympic Games is expected to be cost neutral and at no cost to the Queensland Government.

Value Proposition Assessment Executive Summary

1.9.1.2 THE NON-OCOG BUDGET

The non-OCOG costs for the 2032 Games will include:

- State Government services (planning and delivery)
- Games legacy venues (Games induced venues) and villages
- Legacy and festival programs.

Costs associated with the non-OCOG budget continue to be assessed.

State Government services

The State Government would be required to provide a range of services over a 12-year period that are in addition to business as usual. Australian or local government operational service costs would be the responsibility of each level of government.

Games legacy venues and villages

Queensland is in a strong position in comparison with recent successful Games Candidates as the majority of venues proposed in the indicative 2032 Games Master Plan are either existing or would be delivered through a temporary overlay solution for showcasing purposes (overlay costs are included in the OCOG operating budget).

Legacy opportunities are new venues identified through the indicative 2032 Games Master Plan process that have legacy and community benefits and would be used during the Games.

A range of solutions for villages are also under assessment, with the potential for delivery partnerships with the private sector that could be explored should Queensland be successful in securing the Games.

Legacy and Festival programs

It is proposed a dedicated legacy program be delivered across the State, taking into account a significant range of projects that may be progressed over the extended time period. A festival program would also be curated to drive outcomes for the Queensland arts and cultural community and to enhance the Olympic experience of all Queenslanders, with a Queensland wide festival footprint.

1.9.2 BENEFITS ASSESSMENT

To assess the opportunity for Queensland, the State Government investigated the quantitative and qualitative costs and benefits of bidding for, and potentially hosting the, 2032 Olympic and Paralympic Games. The analysis sought to consider a wide range of social and economic impacts, both quantifiable and non-quantifiable, drawing on best practice methodologies and current information.

1.9.2.1 QUANTIFIABLE BENEFITS

The preliminary analysis has determined the estimated benefits of the 2032 Games could be \$7.4 billion (excluding any assessment of benefits or costs associated with transport infrastructure). This excludes the considerable benefits that are currently not able to be quantified. Quantifiable benefits include but are not limited to an uplift in tourism, trade and jobs.

Induced Tourism

TEQ undertook an assessment of the potential uplift the 2032 Games could deliver Queensland and estimates the 2032 Games would generate an additional \$20.2 billion in international overnight visitor expenditure (OVE) for the period 2020 to 2036. TEQ also estimates the 2032 Games would generate an additional \$3.6 billion in domestic OVE (in real terms) in the year of and the year preceding the 2032 Games.

Trade

TIQ undertook an assessment of the potential uplift the 2032 Games could deliver Queensland and estimates that Queensland could witness a Games-induced uplift in trade exports of up to \$8.63 billion in the ten years leading up to and the ten years following the 2032 Olympic Games.

Jobs

A mega-event such as the Olympic and Paralympic Games will benefit Queensland with long term impacts on jobs across multiple sectors. It is anticipated the Games will support approximately 130,000 direct jobs consisting of:

- an average of 5000 sustained jobs per year, in the 10 years leading up to the Games creating significant tourism and construction job opportunities
- a peak of 115,000 jobs during Games year to support the planning and delivery of the Games
- over 10,000 sustained jobs for at least three years post Games resulting from increased visitation to Queensland.

In addition to direct jobs, there will be tens of thousands of indirect jobs supported by the Games including over 10,000 tourism induced jobs in the Games year alone.

1.9.2.2 QUALITATIVE BENEFITS (SOCIAL IMPACT EVALUATION)

The Games have the potential to deliver significant social benefits and enduring social legacies to all residents of Queensland, including regional communities outside of SEQ. If planned properly, these benefits can begin to be realised from the awarding of the Games.

A range of key social impacts and benefits which are likely to result from the 2032 Games:

- Business and government networks (business-to-business outcomes, government international relations, diplomacy and public-private partnerships).
- Education and skills (upskilling residents, attracting a skilled workforce and developing a skill legacy).
- Volunteers (individual short and long-term benefits, community short and long-term benefits and enhanced skills and capabilities).
- Social cohesion and pride (residents' attitudes to their local area, shared image of city and community, primary networks at a communal level, inclusiveness of communities and institutions, trust in government and quality of life).
- Improved health outcomes through increased uptake of sport and recreation opportunities, active and public transport use, improved liveability of communities and improved mental health through greater participation, social cohesion and community connectedness.
- Inclusion and diversity (inclusion and tolerance of diversity, interest in different cultures, access to education, opportunities for employment).
- Destination branding (awareness of city or country as tourist destination and amenity enhancements).
- Disaster preparedness (measures taken to prevent, prepare for and reduce the effects of natural and man-made disasters).
- Environmental sustainability (sustainability measures and environmental awareness).
- Sport and athletes (elite sporting pathways, sports participation, health impacts, sports diplomacy and integrity in sport).
- Accessible tourism (whether tourist destinations, products, services and experiences are accessible to all people, regardless of their physical limitations, disabilities or age).

1.9.3 OPTIMISING THE BENEFITS

Overall, the 2032 Games represents a unique opportunity to deliver significant quantitative and qualitative benefits to all of Queensland and the Queensland economy across a broad range of factors such as international trade and diplomacy, community health and wellbeing, tourism, innovation, technological development, knowledge, the environment and sporting infrastructure.

A number of benefits optimisation strategies are proposed, primarily related to ensuring effective cross-government collaboration and planning to:

- manage and mitigate cost risks (capital and operations)

Value Proposition Assessment Executive Summary

- enhance and amplify the short and longer term economic and social benefits
- ensure as best as possible that benefits are shared amongst all Queenslanders
- align 2032 Games activities with meaningful and strategic long-term policy directions that deliver positive social impacts to Queenslanders and mitigate against the key identified risks
- achieve effective engagement with the private sector (e.g. construction, property development, etc.) to find solutions that allow successful delivery of the 2032 Games while minimising any unintended consequences (e.g. impacts to property markets, impacts on construction prices, crowding out of other enterprise activities, etc.)
- achieve effective engagement with and inclusion of the Queensland community in the planning and organisation of the event which is understood to increase the likelihood of positive perceptions of mega events and to enhance the likelihood of success of legacy programs
- create effective governance structures including agreed strategies / plans, measurable targets, transparent evaluation against these targets, and clear lines of accountability for delivery against intended outcomes.

1.9.4 GOLD COAST 2018 COMMONWEALTH GAMES ECONOMIC IMPACT

It is relevant to reflect on the findings of Griffith University in their post-Games review on the economic impacts of GC2018. The Griffith University analysis utilised pre- Games, Games year and post-Games data to estimate the likely overall economic and employment benefits of GC2018 for Queensland over the nine-year period from 2013 to 2022.

Overall, the study concluded that the Commonwealth Games provided a \$2.5 billion economic boost to Queensland, compared to a total net expenditure by the Queensland Government of \$1.34 billion. The post-Games report confirmed that the economic benefits identified through initial planning were realised.

1.10 Stakeholder engagement and support

1.10.1 OVERVIEW

Given the magnitude and profile of the decision to bid for (and ultimately host) the Olympic and Paralympic Games, strong community and stakeholder support is vital.

While community engagement has been limited to date, community sentiment can be broadly gauged through the following five studies conducted between October 2018 and October 2019:

- **October 2018:** YouGov Galaxy statewide survey by NewsCorp for The Courier-Mail
- **April 2019:** ReachTel SEQ-only survey by CoMSEQ
- **May 2019:** YouGov Galaxy statewide survey by NewsCorp for The Courier-Mail
- **June 2019:** Nielsen, Australia-wide, for the Tourism and Transport Forum
- **October 2019:** Program of community focus groups and in-depth interviews with local business leaders by Enhance Research for the 2032 Taskforce, across seven locations in regional Queensland (Cairns, Townsville, Rockhampton, Mackay, Proserpine, Mount Isa and Charleville).

Some "business as usual" community engagement was also undertaken by State Government Ministers, and with the Australian Olympic Committee (largely through their "Olympics Unleashed" program in schools, which is delivered in partnership with the Department of Housing and Public Works).

1.10.2 COMMUNITY SENTIMENT

Indications from studies conducted to date suggest there is a strong base level of community support across the whole state for the prospect of Queensland hosting the Olympic and Paralympic Games in 2032:

- 65 per cent overall support across Queensland (up from 56 per cent in October 2018) [The May 2019 YouGov Galaxy survey for The Courier-Mail]

Value Proposition Assessment Executive Summary

- 72 per cent of SEQ residents would support a bid that led to accelerated transport infrastructure [A ReachTel poll commissioned by CoMSEQ in April 2019]
- 70 per cent support among Australians [National Nielsen poll commissioned by the Tourism and Transport Forum in June 2019].

A community and business consultation program conducted by the 2032 Taskforce across key regional areas (Cairns, Townsville, Rockhampton, Mackay, Proserpine, Mount Isa and Charleville) in October 2019 confirmed solid levels of community and stakeholder positivity towards a 2032 Games in Queensland. Regional engagement has shown communities see the benefits including:

- pre-Games training opportunities
- improvements in healthier activities
- benefits in youth engagement
- supply chain opportunities.

1.10.3 STAKEHOLDER ENGAGEMENT OUTCOMES

The outcome of stakeholder engagement activities conducted during the VPA phase has:

- shaped specific elements of the indicative 2032 Games Master Plan.
- identified the programs and legacy opportunities that are most relevant, meaningful and appealing to a range of regional stakeholders in different parts of the State.
- confirmed alignment with existing regional plans and priorities and shaped the proposition accordingly.

Overall there is a strong sense that a potential 2032 Games Proposal submission by Queensland enjoys the support of media, the business community and key sectors such as tourism, arts, transport and sporting bodies.

1.11 Conclusions and next steps

1.11.1 CONCLUSIONS

Conclusion 1:

Based on the proposed Games concept, the 2032 Games are feasible and could bring significant economic benefits but only with the financial and in-kind support from all levels of government.

- The Olympic Games Organising Committee operating costs of \$4.45 billion are expected to be cost neutral and at no cost to the State.
- The quantifiable economic benefits for Queensland have been estimated at around \$7.4 billion. In addition, there are a range of qualitative social and community benefits that the Games could deliver over a potential two-decade window of opportunity.
- The Games could have a positive impact on job creation, supporting around 130,000 direct jobs. In addition to direct jobs, there will be tens of thousands of indirect jobs supported by the Games including over 10,000 tourism induced jobs in the Games year alone.
- The tourism and trade opportunities the Games could deliver are significant. This includes an estimated uplift of around \$20.2 billion in international visitor expenditure between 2020 and 2036 and increased export opportunities of up to \$8.6 billion.
- While there is a requirement for some investment in venue infrastructure, these investments are aligned with long-term plans and provide community benefits.

2032 Olympic and Paralympic Games

Value Proposition Assessment Executive Summary

- The Olympic Games expenditure commitment can be staged over a 12+ year period leading up to the Games, with legacy benefits accruing over the 20-year period from 2022 to 2042.

Conclusion 2:

It is an opportune time to bid with unique advantages.

- The recent Olympic Agenda 2020, *New Norm* reforms and recent changes to the bidding process generate an immediate advantage that would not be repeated.
- The philosophical shifts that are represented by the reforms require the Games to be more aligned with value creation and legacy for Games hosts and host communities.
- The recent cycle of hosting is geographically advantageous for the southern hemisphere.

Conclusion 3:

Early indications suggest public support is high without the implementation of any substantive community engagement.

- Early indications suggest general support from the public, even in the absence of any concerted efforts to engage community (during the VPA phase).
- This community support in Queensland would be well received by the IOC in respect of a Queensland Games proposition.

Conclusion 4:

With appropriate planning, investment and collaboration, the Games can provide a two-decade window of opportunity.

- The 2032 Games and the SEQ City Deal currently under development provide a catalytic opportunity for all three levels of Government to agree on key priorities including transport infrastructure projects.
- The Games present an economic reform opportunity that could generate new capability and confidence in the Queensland economy.
- If leveraged effectively, the Games could provide a viable platform from which to launch a range of new economic opportunities for the Queensland economy.
- The Games could directly and indirectly create social legacies that would last generations.

1.11.2 NEXT STEPS

The Queensland Government has endorsed a staged approach towards a candidature.

The next stage involves finalising the master plan, securing funding and operational service agreements with all levels of government and confirming the associated costs to the State.

The Queensland Government will continue to work collaboratively with key stakeholders at a local, state, national and international level.