

CWQ DATA COLLECTION & ANALYSIS

JUNE 2021

PREPARED BY: STAFFORD STRATEGY
FOR: CENTRAL WESTERN QUEENSLAND
REMOTE AREA PLANNING AND
DEVELOPMENT BOARD





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INTRODUCTION & CONTEXT



ABOUT THE PROJECT

Introduction

Stafford Strategy (Stafford) was commissioned by the Central Western Queensland Remote Area Planning and Development Board (RAPAD) to complete an update to the tourism data model it created for the Central West Queensland (CWQ) region in 2020.

The project was originally requested to support the diversification of CWQ's economy through strengthening the tourism sector and building economic resilience in its communities.

The update has been requested in light of COVID-19 and the significant impacts it has had on the Australian tourism economy. This report will need to be updated in 12 months time to ensure data remains relevant to all LGAs (councils and industry operators) and for RAPAD.

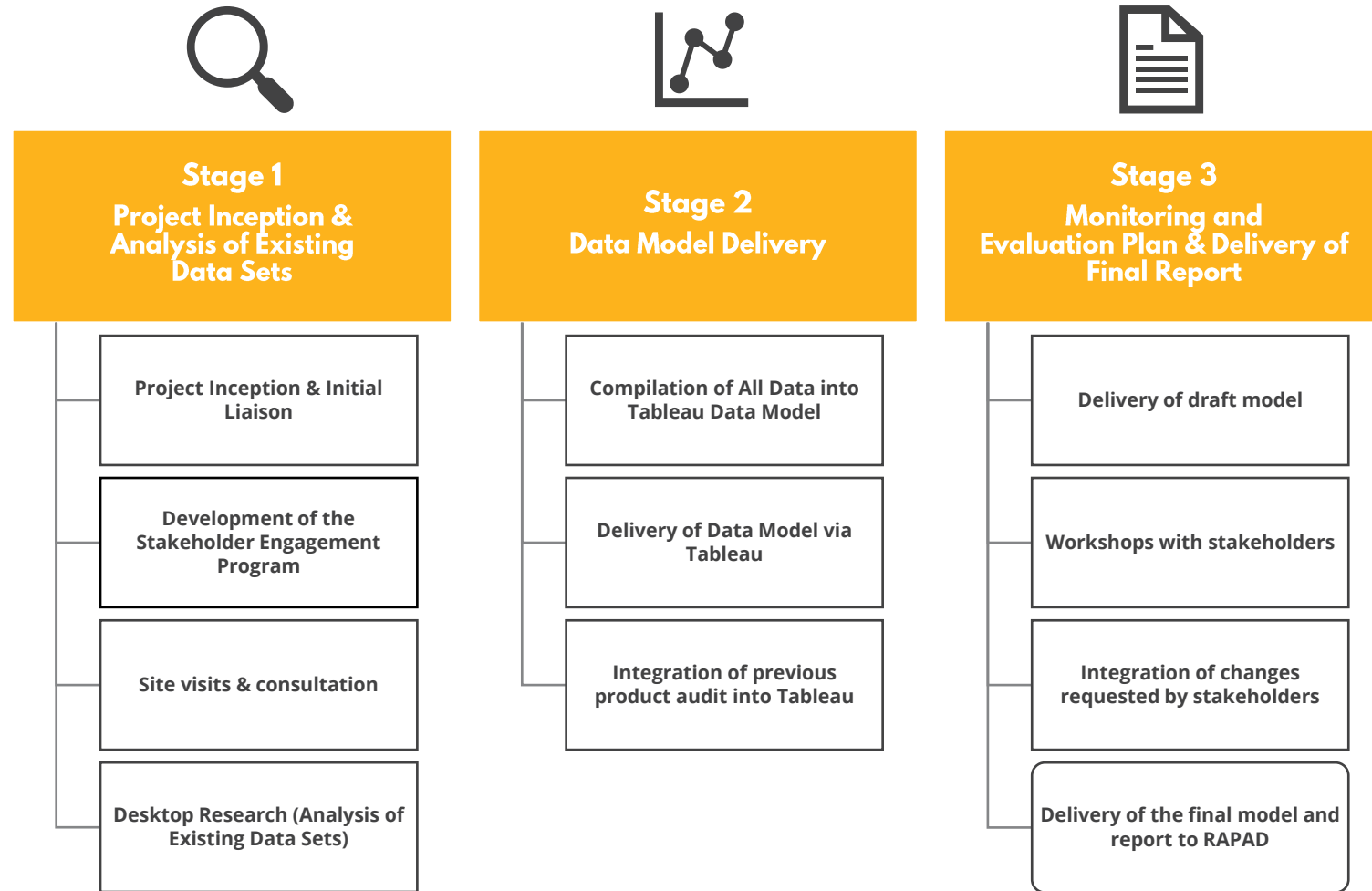
Scope

The scope of the project included the following.

- Identify currently available data sets excluding the following which have already been identified.
- Identify data deficiencies and possible options to obtain data to overcome the deficiencies.
- Develop a scalable model which allows collection and analysis of data to address the regional data deficiencies.
- Deliver a Monitoring and Evaluation Plan detailing the project schedule of activities, mechanisms for monitoring progress and evaluation outcomes to RAPAD for endorsement.

Methodology

The following figure demonstrates the methodology followed for the completion of this project.



Consultation undertaken

To complete a robust visitor data model and audit for the CWQ region required extensive consultation to be undertaken at a local level as well as with relevant State Government departments. The following diagram summarises the consultation undertaken.

It is important to note that due to weather events beyond the project team’s control, some LGAs (Barcoo, Diamantina and Boulia) were unable to be visited in person while the project team was in region. Phone and Skype interviews as well as email dialogue was offered to all stakeholders in lieu of in person visits.

State	Tourism and Events Queensland	Department of Tourism Investment and Development		
	Queensland Airports Limited			
	Queensland Rail			
Regional	Outback Tourism			
	RAPAD			
Local	Councillors and/or personnel from Longreach Regional Council	Councillors and/or personnel from Barcoo Shire Council	Event operators including the Big Red Bash, Vision Splendid Outback Film Festival, Bettering Blackall Festival, Winton Outback Festival	Accommodation (including caravan parks) operators in Longreach, Winton, Jundah, Stonehenge, Barcaldine, Birdsville, Boulia, Tambo, Bedourie
	Councillors and/or personnel from Winton Shire Council	Councillors and/or personnel from Boulia Shire Council	Bakery operators in Longreach, Winton, Barcaldine	A variety of other industry stakeholders including newsagencies, petrol stations, retail, supermarkets etc.
	Councillors and/or personnel from Barcaldine Regional Council	Councillors and/or personnel from Diamantina Shire Council	Café operators in a variety of LGAs	VICs including Barcaldine VIC, Jundah VIC, Longreach VIC, Windorah VIC, Stonehenge VIC, Min Min Encounter VIC, Wirrarri Information Centre
	Councillors and/or personnel from Blackall-Tambo Regional Council	Major attractions including Qantas Founders Museum, Australian Stockman’s Hall of Fame, Waltzing Matilda Centre, Smithy’s Outback Dinner & Show, School of the Air	Pub operators in Longreach, Winton, Isisford, Stonehenge, Birdsville,	

THE CWQ REGION

The RAPAD region, situated in Central West Queensland (CWQ), includes seven local government areas, including Barcaldine Regional Council, Barcoo Shire Council, Blackall-Tambo Regional Council, Boulia Shire Council, Diamantina Shire Council, Longreach Regional Council and Winton Shire Council.

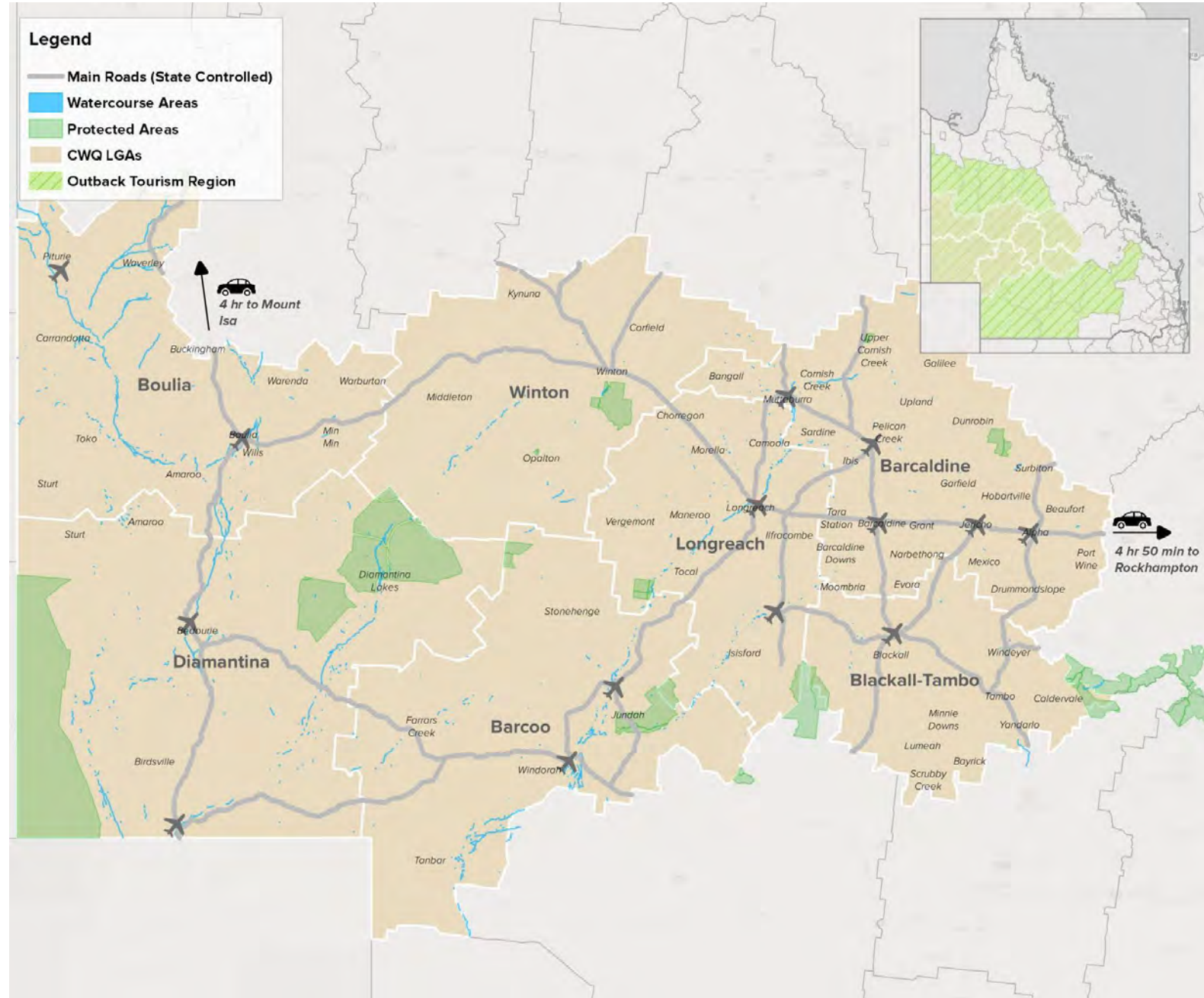
While being a geographically larger area (comprising almost 23% of the land area of Queensland), it is also one of the most sparsely populated and remote regions.

The region's major air access point is Longreach Airport, with daily flights to Brisbane and twice-weekly flights to Townsville, though other regular air services are also provided into Birdsville, Barcaldine and Blackall.

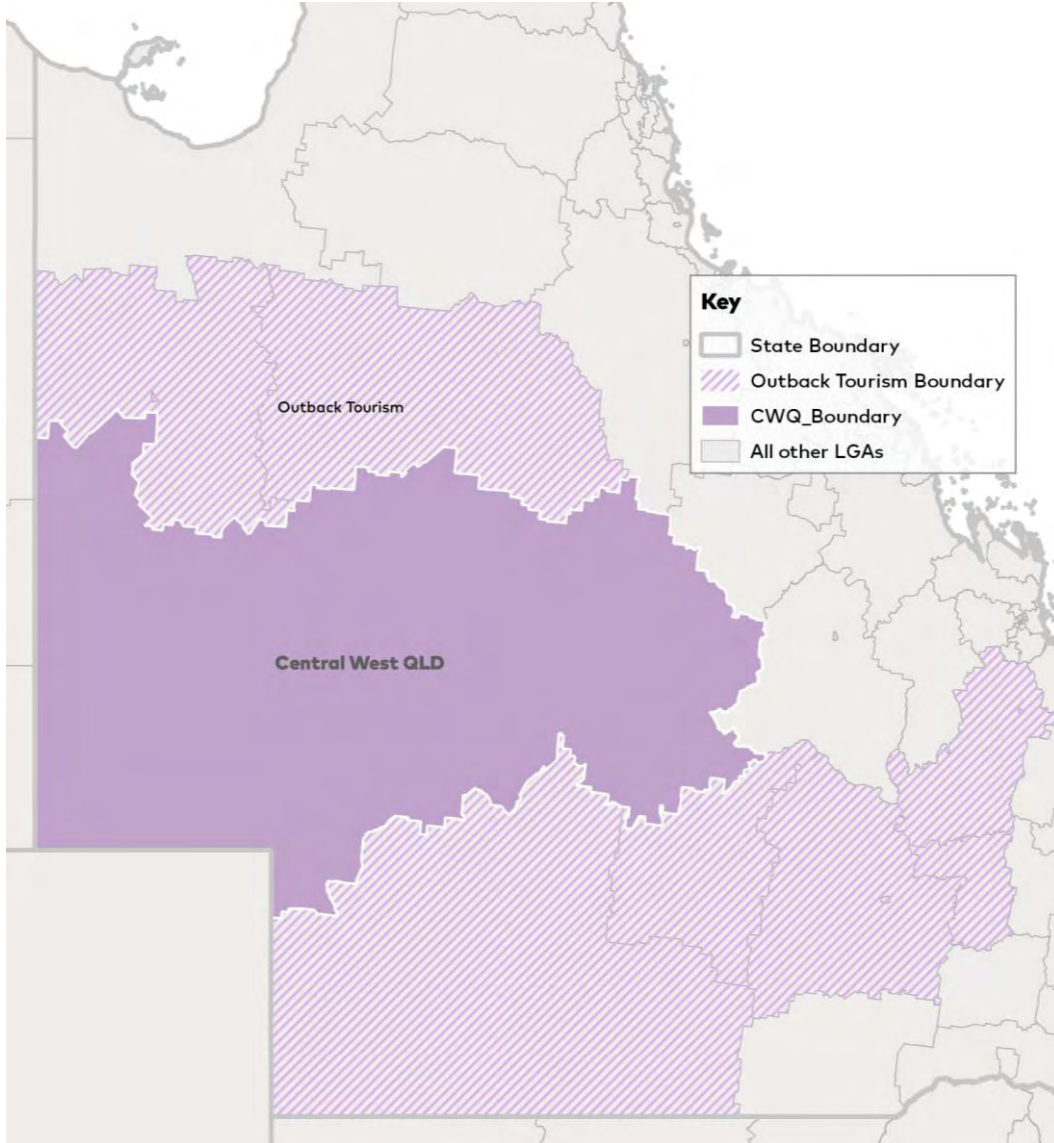
Queensland Rail's Spirit of the Outback also travels through Barcaldine and Longreach, with connecting bus services through to Winton.

In terms of tourism boundaries, the CWQ region is included in the much larger *Outback Queensland* region (as defined by TEQ) which comprises 18 LGAs in total (shaded in hatched brown in the figure on the following page).

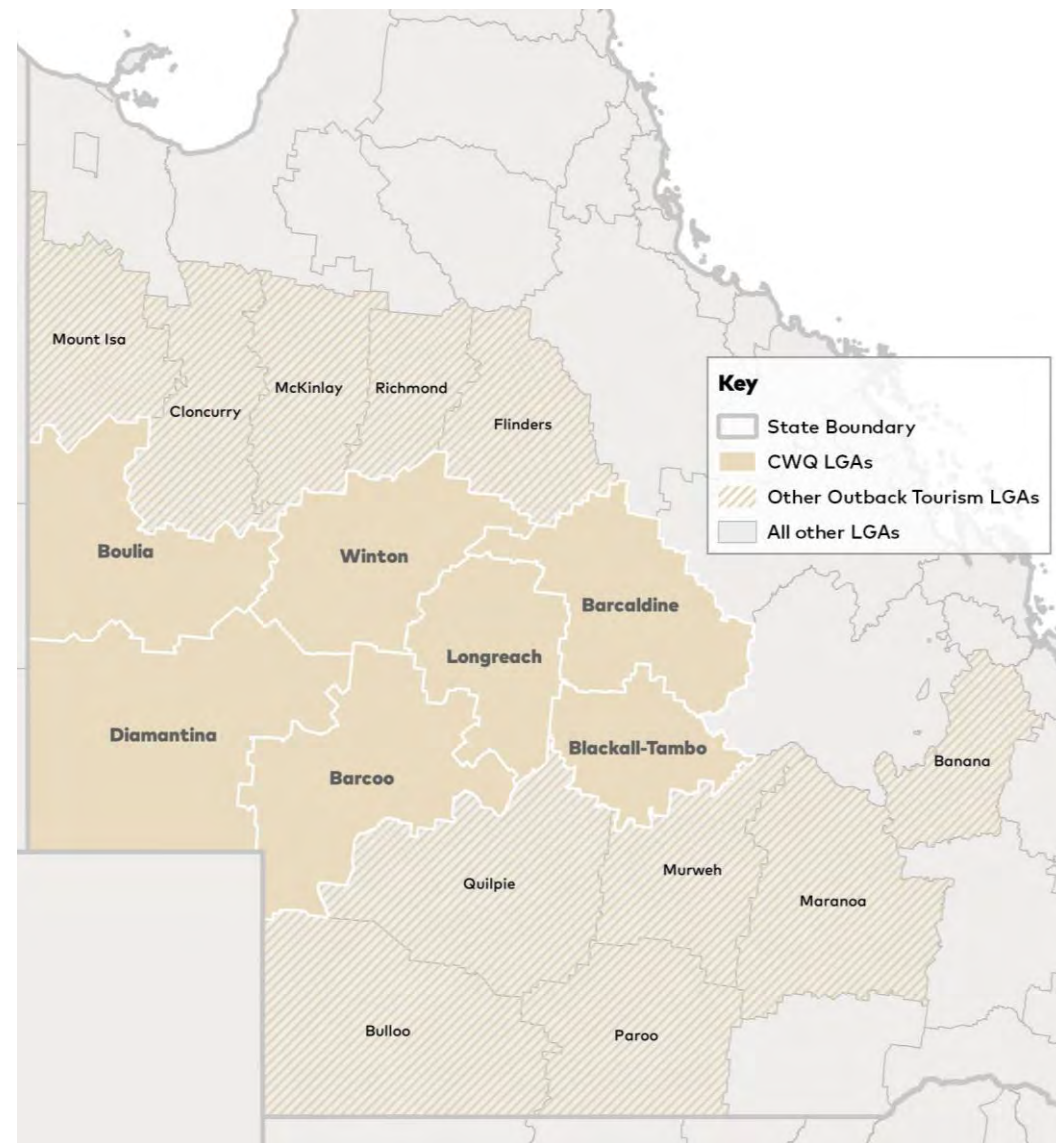
The Outback Queensland region is divided into five sub-regions and CWQ falls within the Far West (Boulia, Barcoo and Diamantina) and Central West (Winton, Longreach, Blackall-Tambo and Barcaldine) sub-regions.



Outback Tourism boundary (with CWQ overlaid)



LGAs within the CWQ (and broader Outback Tourism) region



The Visitor Profile

As indicated earlier, this project is very focused on data. To ensure stakeholders are not overwhelmed by the amount of data able to be presented and to ensure that the data being provided delivers on the needs of RAPAD and its stakeholders, the scope of data collection has been kept realistically tight.

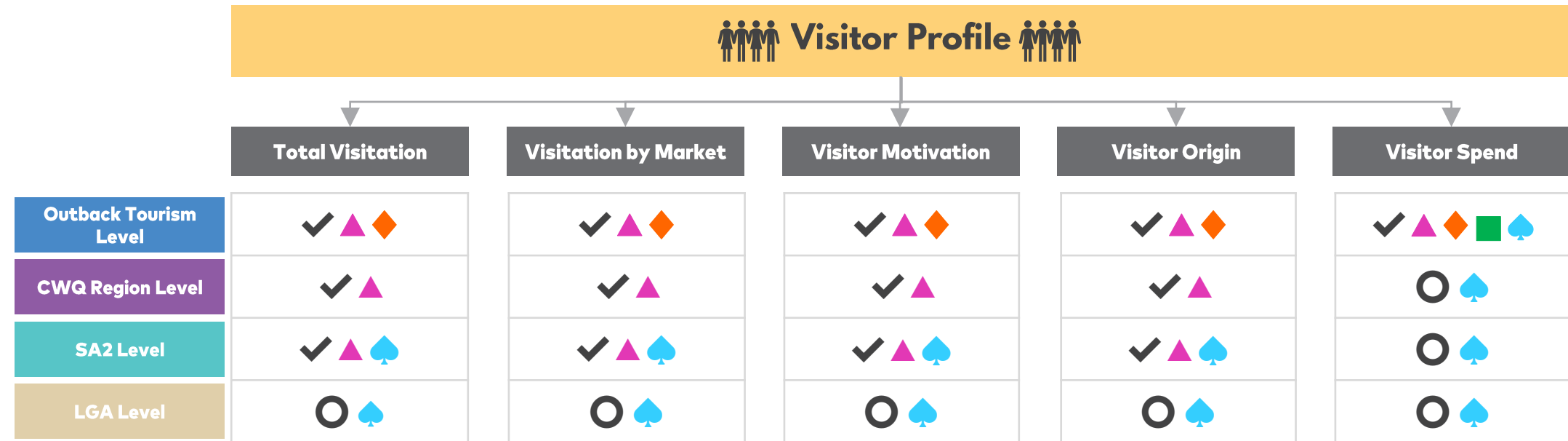
The following figure demonstrates what data has been collected and how the data was collated.

- Total visitation to the seven LGAs within the CWQ region.
- Visitation by market to each LGA. This includes domestic day trip, domestic overnight and international visitation.

- Visitor motivation by market to each LGA. Motivations include travelling for a holiday, to visit friends and relatives, for business and other (which generally includes education, funerals etc.).
- Visitor origin by market. This includes by state for domestic visitors and by country group for international visitors.
- Visitor spend estimates based on an average spend by market.

The data demonstrated in this report and in the dashboards provided are focused on LGA level data. Higher level data (SA2 and Outback Tourism level) was needed in order to derive an LGA breakdown.

Our desk top research exercise was therefore created as a top down approach, and this was supplemented with a bottom up approach through the research undertaken by the team from visiting the region and conducting stakeholder research, on the ground.



Data Source Key:

- ▲ TRA IVS and NVS (5 year average) ◆ TEQ Outback Queensland Regional Snapshot
- Regional Tourism Satellite Accounts ♠ In region consultation & modelling

Data Availability Key:

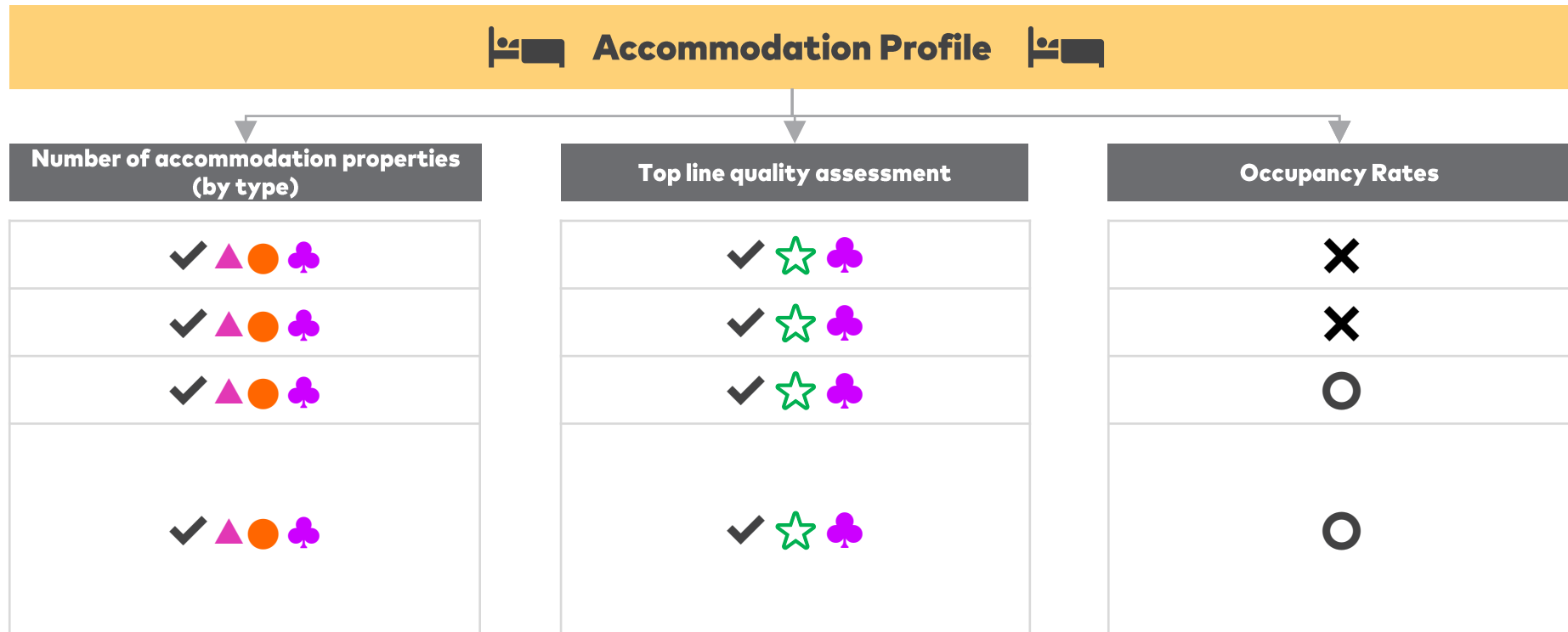
- ✓ Data currently available with suitable sample sizes ○ Data developed through in region consultation and modelling

Accommodation Profile

The accommodation profile provides a summary of the types of accommodation offered in the CWQ region, the number of rooms available, a top line quality assessment of properties as well as an indication of estimated occupancy rates.

The estimated occupancy rates for properties has been based on a sample of interviews with accommodation operators in the region. This is highly confidential data and is not displayed within this report. It has been used as a base for ascertaining overnight visitation to each of the LGAs.

The top line quality assessment undertaken has been based on a desktop exercise only, rather than in person visits to each property. It is based on Stafford's experience in the accommodation sector and quality comparisons with domestic and international accommodation product we have also assessed in many parts of Queensland and in other states and territories.



Data Source Key:

- ▼ Australian Tourism Data Warehouse
- Council & RTO Websites
- ☆ Review Websites (TripAdvisor etc.)
- ♣ Desktop research

Data Availability Key

- ✓ Data currently available with suitable sample sizes
- Data developed through in region consultation and modelling

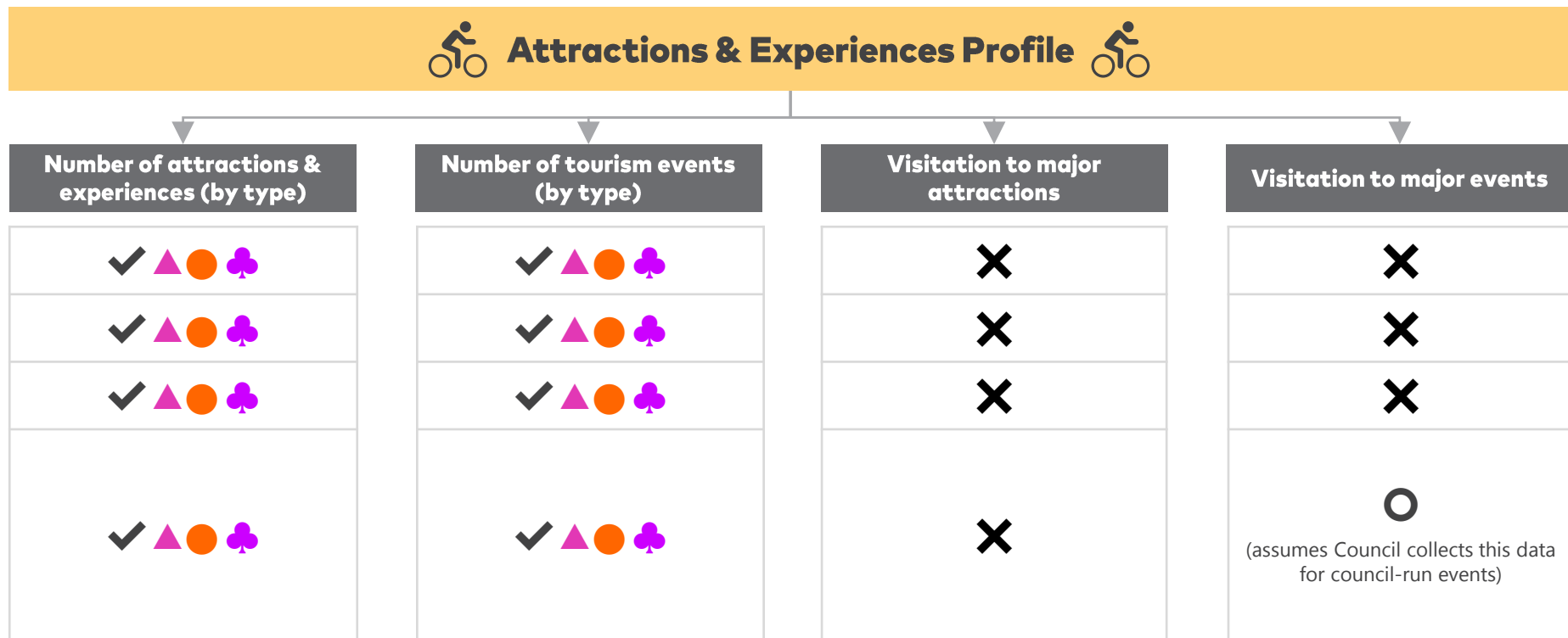
Attractions & Experiences Profile

An attractions and experiences profile has also been completed for the CWQ region and its individual LGAs. The profile is based on in person visits to the region, listings on the Australian Tourism Data Warehouse (ATDW) as well as an extensive desktop audit.

An events audit has also been completed, focused only on destination events. Destination events are

those which attract a large proportion of its patrons from outside the surrounding region. Community events, on the other hand, while being important, are more so focused on local residents.

It is important to note that there was very little data available for most events on patronage or detail on where event attendees came from.



Data Source Key:

- ▼ Australian Tourism Data Warehouse
- Council & RTO Websites
- ♣ Desktop research

Data Availability Key

- ✓ Data currently available with suitable sample sizes
- Data partially available but requires supplementation with consultation
- ✗ Data not currently available



THE VISITOR MODEL

Tourism data collected based on SA2 Boundaries

Australia's tourism data is predominately based on the International and National Visitor Surveys (IVS & NVS). The smallest geographic level this data goes down to are SA2 (Statistical Area 2) geographic boundaries.

SA2s are defined by the Australian Bureau of Statistics (ABS) as a medium-sized general purpose area which represent a community that interacts together social and economically.

In regional areas, SA2s typically comprise more than one LGA. On the other hand, in city areas, by virtue of their population size, LGAs normally comprise more than one SA2.

There are three SA2s within the CWQ region:

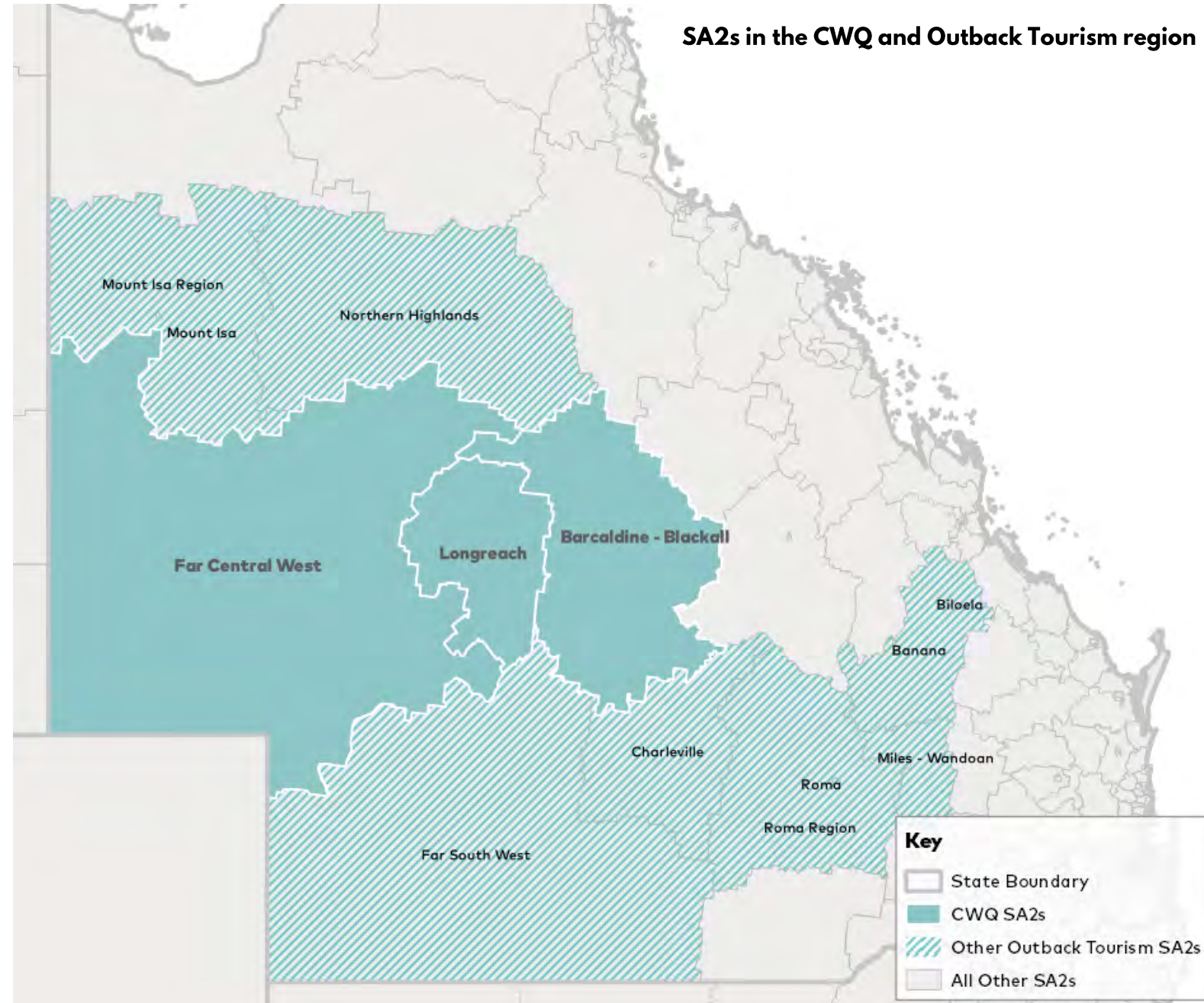
- Far Central West SA2: which includes the LGAs of Barcoo, Boulia, Diamantina and Winton;
- Longreach: which includes only Longreach LGA because of its larger population base; and
- Barcaldine-Blackall: which comprises both Barcaldine and Blackall-Tambo LGAs.

This is a challenge because the data provided through the IVS and NVS does not go down to an LGA level in the CWQ region.

Furthermore, some of the sample sizes used at an SA2 level are too small to rely on the data with confidence.

As a result, this project has undertaken extensive consultation within the CWQ region to derive an estimate on visitation to each LGA and also to "truth test" the SA2 data.

SA2s in the CWQ and Outback Tourism region



Small sample sizes

One of the major constraints of the NVS and IVS, particularly for regional areas, is the size of the samples achieved. The two tables indicate sample sizes and visitation to the three SA2s in the CWQ region on an annual basis and based on five year averages (with the). They demonstrate the following.

- Assessing data on an annual basis is problematic because of small sample sizes and large variances in visitation. TRA recommends a sample size of at least 40. Nearly all datasets do not achieve this on an annual basis in the RAPAD region.
- When data is averaged over five years, the sample sizes are more robust (except for the domestic day trip data). However, when one assesses the sample size to visitation results it is obvious that, in most cases, when there is a larger sample size available, visitation tends to also be far stronger. For example, from 2010-2014, domestic overnight visitation to Far Central West was 72k (according to the NVS). This was based on a sample size of 190. However, between 2015-2019, a sample size of 265 was achieved and visitation was recorded at 115k – almost 60% higher.
- This leads to the query that even with an acceptable sample size of more than 40, the TRA data may potentially be underrepresenting visitation in the RAPAD region. This necessitates other forms of truth testing – research to ensure an accurate assessment of visitation can be derived.
- It is also important to note that this issue is common throughout many regional areas across Australia; RAPAD is therefore not alone in grappling with this issue.

Annual Visits to SA2s

Destination..	Visitor Type		Year															
			2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Barcaldine - Blackall	Domestic Day	Sample	5	11	9	6	2	4	4	1	4	2	4	3	2	2	5	3
		Visits	70,330	149,437	115,067	85,443	42,653	62,218	67,617	13,433	52,244	25,887	41,022	54,104	44,633	6,454	72,876	24,649
	Domestic Overnight	Sample	28	41	19	28	24	27	25	28	30	26	27	41	50	51	43	33
		Visits	95,348	151,840	74,173	100,988	91,364	68,359	82,322	97,954	77,809	71,600	92,097	88,964	146,516	118,951	128,823	85,515
	International	Sample	26	26	28	33	35	27	28	20	11	8	10	15	16	14	9	4
		Visits	3,316	3,316	7,845	7,976	5,660	5,532	4,073	3,322	1,720	1,261	2,310	4,300	4,589	3,075	2,556	1,114
Far Central West	Domestic Day	Sample	1	6	4		1	1		2	1	2	2	3	4	4	1	4
		Visits	11,881	61,412	58,075		7,950	5,492		19,558	6,219	6,606	29,854	30,134	70,106	34,042	9,423	42,018
	Domestic Overnight	Sample	35	34	32	27	31	39	34	39	51	27	36	53	53	60	63	46
		Visits	66,100	128,506	67,988	77,406	104,989	99,602	76,503	119,342	89,645	57,914	90,864	149,075	141,268	154,339	170,131	117,348
	International	Sample	30	30	27	34	37	32	32	15	21	23	28	11	20	18	16	11
		Visits	4,182	4,182	3,689	7,175	5,952	5,533	4,114	2,333	3,583	3,809	6,510	2,641	4,444	5,505	4,680	3,339
Longreach	Domestic Day	Sample	3	3	3	3	2	2	5	3		1		1	5	7	3	4
		Visits	32,342	40,849	45,432	54,522	45,563	29,212	101,753	41,522		3,343		23,118	57,997	73,794	28,352	36,060
	Domestic Overnight	Sample	35	39	24	38	29	50	47	42	49	42	39	58	56	74	51	40
		Visits	71,356	97,674	57,428	100,682	67,958	117,156	140,100	115,382	82,276	105,577	95,186	117,347	108,952	151,424	121,894	87,456
	International	Sample	14	14	16	27	30	24	25	14	16	26	14	16	13	15	14	14
		Visits	1,983	1,983	2,101	4,732	5,307	4,396	3,265	1,752	2,117	4,728	2,604	4,093	2,168	3,402	2,986	2,988

Visits to SA2s (5 Year Averages, except for 2020)

Destination SA2		Domestic Day				Domestic Overnight				International			
		2009	2014	2019	2020	2009	2014	2019	2020	2009	2014	2019	2020
Barcaldine - Blackall	Sample	33	15	16	3	140	136	212	33	148	94	64	4
	Visits	92,586	44,280	43,818	24,649	102,743	79,609	115,070	85,515	5,623	3,181	3,366	1,114
Far Central West	Sample	12	6	14	4	159	190	265	46	158	123	93	11
	Visits	27,864	7,575	34,712	42,018	88,998	88,601	141,135	117,348	5,036	3,874	4,756	3,339
Longreach	Sample	14	11	16	4	165	230	278	40	101	105	72	14
	Visits	43,742	35,166	36,652	36,060	79,019	112,098	118,961	87,456	3,221	3,252	3,051	2,988

Overcoming the data deficiencies

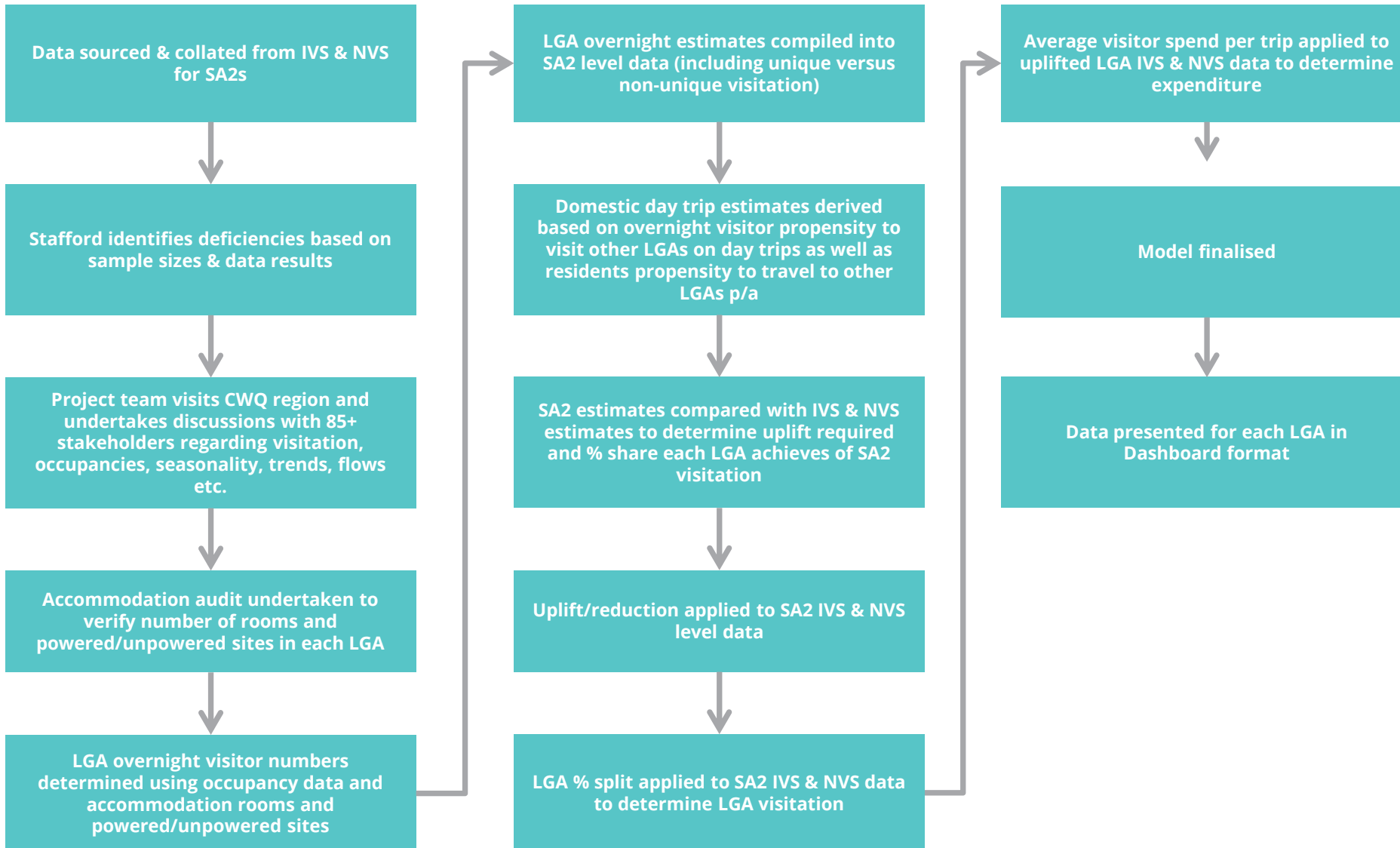
The following table provides a summary of some of the data deficiencies identified and the resolution that was applied to ensure a robust dataset was able to be created.

Visitor Profile		Accommodation Profile		Attractions/Experiences Profile	
Deficiency (level of data)	Resolution	Deficiency (level of data)	Resolution	Deficiency (level of data)	Resolution
Total Visitation (LGA Level)	<ul style="list-style-type: none"> Discussion/survey with industry operators & other relevant stakeholders to obtain aggregated estimated split Discussion/interviews with Council personnel Discussions/interviews with TEQ and RTO personnel Assessment of surrounding LGA visitation trends Development of model which utilises SA2 data and applies estimated visitation split at an LGA level Discussion with industry operators on visitor origin and travel patterns 	Occupancy rates (all levels)	<ul style="list-style-type: none"> Discussion/survey with accommodation industry operators on occupancy rates and trends based on accommodation type Assessment of surrounding RTO occupancy levels (based on the Australian Accommodation Profile released by TRA – note no data is provided in this for Outback QLD) Desktop audit based on number of properties and quality to understand the influence this may have on occupancy rates Assessment of overnight visitation to LGAs to understand the influence this may have on occupancy rates 	Visitation to major attractions (all levels)	<ul style="list-style-type: none"> Discussion with tourism industry operators to ascertain visitation levels (data will be confidential and only released on an aggregated level) Discussion with Council and RTO tourism personnel
Visitation by market (LGA level)				Visitation to major events (all levels)	
Visitor origin (LGA level)				<ul style="list-style-type: none"> Application of average spend per visitor data at an Outback Tourism region level to SA2 and LGA data to get total SA2 and LGA visitor spend Supplementation of Outback Tourism average spend per visitor data with industry feedback on visitor spend levels to allow for CWQ visitor spend estimates to be created 	
Visitor spend (CWQ, SA2 & LGA level)					

HOW THE VISITOR DATA HAS BEEN DEVELOPED

The following flow chart outlines the methodology followed in order to develop LGA-level visitation data for the CWQ region. It demonstrates that while the IVS and NVS have been used as a base source for the data, this data has been revised and extrapolated to an LGA level, based on in-depth in-region consultation to provide a more accurate reflection of visitation and spend within each LGA.

The data model has been developed in Excel and can be viewed within Excel in Dashboard format. While there are a plethora of big data analysis tools which exist and which can be used to show data in interesting ways and formats, Excel has been used to ensure it is able to be updated without requiring a niche skillset to do so. This makes it far more user friendly.



General assumptions

The development of the data model required a number of assumptions to be applied. The following lists the various assumptions applied and the rationale behind these.

- Inflation has been set at 2% to reflect current rates,
- The CWQ region has highly seasonal visitation. Based on extensive consultation, the two main season comprise:
 - Peak: 214 days, extending from April – October; and
 - Off-peak: 151 days, from November – March

Visitor type assumptions

Domestic day trip data is the weakest dataset in the NVS. The sample sizes for the CWQ region are particularly challenging. Domestic day trip visitors for the CWQ region can effectively be broken down into two categories:

- Locals: Locals can be considered a domestic day trip visitor if they travel more than 25 km one-way and stay in the area for more than 4 hours. Travel to/from work is excluded. For example, someone from Longreach who travels to Winton to visit the new waterpark and stays 4+ hours would be considered a domestic day trip visitor.
- True visitors: Visitors from outside the region who may be staying overnight in one LGA but undertaking day trips to other LGAs. Such as a visitor who is staying overnight in Longreach but who may travel to Winton for the day to undertake the Australian Age of Dinosaurs experience.

Regarding local domestic day trip travel, it has been assumed that, on average, residents from:

- Barcardine visit Blackall-Tambo 2 times p/a and visit Longreach 6 times p/a;

- Blackall-Tambo visit Barcardine 2 times p/a and Longreach 6 times p/a;
- Barcoo visit Longreach 2 times p/a;
- Boulia visit Diamantina 1 times p/a (it has been assumed that Boulia residents are more likely to use Mount Isa as their regional hub over Longreach);
- Diamantina visit Barcoo 1 time p/a, Boulia 1 time p/a and Longreach 2 times p/a;
- Winton visit Longreach 8 times p/a; and
- Longreach visit Barcardine 1 times p/a, Barcoo 0.15 times p/a (this takes into consideration that not every Longreach resident is likely to visit Barcoo) and Winton 2 times p/a.

These local domestic day trip estimates are based on discussions with local residents regarding their travel to surrounding LGAs for leisure, to visit friends and family, to dine and shop, to access flights and for medical purposes.

Regarding true visitor domestic day trip visitation, it has been assumed that, on average:

- 3% of domestic overnight visitors to Barcardine would undertake a day trip to Blackall-Tambo and 10% do a day trip to Longreach;
- 10% of domestic overnight visitors to Blackall-Tambo would undertake a day trip to Barcardine;
- 10% of domestic overnight visitors to Winton would undertake a day trip to Longreach; and
- 15% of domestic overnight visitors to Longreach would undertake a day trip to Winton.

It is considered that other LGAs in the CWQ region are likely too remote/far apart to attract domestic day trip visitation. They are more likely to generate overnight visits.

Accommodation assumptions

The table on the following page provides a summary of the assumptions applied to generate domestic and international overnight visitation to LGAs within the CWQ region. Points to note include the following.

- The assumptions applied are based on discussions with industry, Council, Outback Tourism and residents as well as Stafford's experience in the Outback region over a number of years.
- The number of rooms and sites are based on an extensive accommodation audit which was completed and verified by a number of stakeholders throughout the region.
- There is further work required, however, to confirm the number of freedom camping sites in particular. A half yearly survey by each council has been recommended to achieve this.
- Peak and off-peak occupancy rates are an average of those provided by accommodation operators and discussions with industry in the region.

Accommodation Occupancy Assessment	Barcaldine - Blackall SA2		Far Central West SA2				Longreach SA2
	Barcaldine	Blackall-Tambo	Barcoo	Boulia	Diamantina	Winton	Longreach
Hotels, Motels, Airbnbs, Apartments							
Number of rooms	247	152	49	42	78	122	383
ALOS	2 nights	2 nights	2 nights	2 nights	2 nights	2 nights	2 nights
Guests per room	2 guests	2 guests	2 guests	2 guests	2 guests	2 guests	2 guests
Avg Annual Occupancy Rate - Peak	70%	70%	60%	70%	86%	85%	83%
Avg Annual Occupancy Rate - Off Peak	25%	25%	12%	12%	12%	40%	45%
Max annual number of guests	90,155	55,480	17,885	15,330	28,470	44,530	139,795
Est. domestic split %	98%	98%	98%	98%	98%	98%	98%
Est. international split %	2%	2%	2%	2%	2%	2%	2%
Caravan Park Sites							
Number of sites	260	121	73	130	110	112	421
ALOS	2 nights	2 nights	2 nights	2 nights	2 nights	2 nights	2 nights
Guests per site	2 guests	2 guests	2 guests	2 guests	2 guests	2 guests	2 guests
Avg Annual Occupancy Rate - Peak	70%	65%	50%	60%	60%	170%	80%
Avg Annual Occupancy Rate - Off Peak	3%	3%	3%	3%	3%	3%	3%
Max annual number of guests	90,155	44,165	26,645	47,450	40,150	40,880	153,665
Est. domestic split %	98%	98%	98%	98%	98%	98%	98%
Est. international split %	2%	2%	2%	2%	2%	2%	2%
Freedom Camping							
Number of sites	264	82	156	85	90	150	422
ALOS	2 nights	2 nights	2 nights	2 nights	2 nights	2 nights	2 nights
Guests per site	2 guests	2 guests	2 guests	2 guests	2 guests	2 guests	2 guests
Avg Annual Occupancy Rate - Peak	60%	65%	55%	70%	55%	80%	85%
Avg Annual Occupancy Rate - Off Peak	3%	3%	3%	3%	3%	5%	5%
Max annual number of guests	90,155	29,930	56,940	0	32,850	54,750	154,030
Est. number of guests - Total	35,094	11,778	19,068	13,118	11,001	26,813	79,948
Est. domestic split %	98%	98%	98%	98%	98%	98%	98%
Est. international split %	2%	2%	2%	2%	2%	2%	2%

Visitor spend assumptions

To determine estimated visitor spend in each LGA, a series of average spend per trip per visitor estimates have been applied to visitation data. The following table summarises the estimates. These are based on discussions with industry regarding average spend in attractions, accommodation, retail and F&B providers and average spend estimates supplied by TRA for the Outback Tourism region as well as Queensland generally.

The table which follows provides data reflecting visitor spend per trip, so for overnight visitors, this reflects spend over a number of days. It also breaks down spend based on motivation as different types of visitors are likely to spend different amounts.

Points to note include the following.

- Average spend per trip figures include estimated spend on accommodation, petrol, event tickets, attractions, all meals, retail, groceries and other misc. services.
- The average length of stay (ALOS) for overnight visitors differs according to motivation for travel and the LGA. While these are assumptions, they are based on discussions with a variety of personnel within the region. They represent an average only.
- Some LGAs have a lower assumed spend level because there are fewer paid attractions for visitors to undertake.
- It has been assumed that business visitors spend far higher because of their spend on commercial accommodation and likely spend on 3 meals per day at a F&B provider.
- VFR visitors, particularly overnight visitors, have a lower assumed average spend because they are far more likely to stay in accommodation with friends and family, rather than within commercial accommodation.

Avg Spend p/visitor p/trip	Barcaldine	Blackall-Tambo	Barcoo	Boulia	Diamantina	Winton	Longreach
Holiday							
Domestic Day	\$64	\$60	\$80	\$90	\$90	\$120	\$120
Domestic Overnight	\$173	\$169	\$110	\$270	\$570	\$490	\$490
<i>Estimated ALOS</i>	1.5 nights	1.5 nights	1.0 nights	1.0 nights	2.0 nights	2.0 nights	2.0 nights
International	\$173	\$169	\$110	\$270	\$570	\$490	\$490
<i>Estimated ALOS</i>	1.5 nights	1.5 nights	1.0 nights	1.0 nights	2.0 nights	2.0 nights	2.0 nights
VFR							
Domestic Day	\$64	\$60	\$80	\$90	\$90	\$120	\$120
Domestic Overnight	\$74	\$70	\$90	\$220	\$345	\$360	\$360
<i>Estimated ALOS</i>	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family
International	\$74	\$70	\$90	\$220	\$345	\$360	\$360
<i>Estimated ALOS</i>	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family	n/a - with friends/family
Business							
Domestic Day	\$60	\$60	\$80	\$80	\$90	\$80	\$80
Domestic Overnight	\$1,020	\$765	\$1,645	\$1,020	\$1,100	\$900	\$900
<i>Estimated ALOS</i>	4.0 nights	3.0 nights	7.0 nights	4.0 nights	4.0 nights	4.0 nights	4.0 nights
International	\$1,020	\$765	\$1,645	\$1,020	\$1,100	\$900	\$900
<i>Estimated ALOS</i>	4.0 nights	3.0 nights	7.0 nights	4.0 nights	4.0 nights	4.0 nights	4.0 nights

UPLIFTS/DECREASES APPLIED

As indicated earlier, by comparing the overnight visitor data developed specifically for this exercise (and which is based on accommodation occupancy rates and the number of rooms and sites, the average number of guests per room/site and estimates based on domestic versus international guests) to TRA's SA2 overnight visitor data, we are able to determine how under or overestimated the IVS and NVS datasets are for the CWQ region.

The assessment undertaken identified that for most LGAs and visitor types, the IVS and NVS have underestimated the actual level of visitation occurring. By way of example:

- The accommodation assessment undertaken for this project identified that there were approximately 168k unique domestic overnight visitors who stayed in motels, holiday homes, caravan parks and camping sites in the Far Central West SA2 (Which includes Barcoo, Boulia, Diamantina and Winton LGAs) in 2019.
- The NVS, on the other hand, estimated 115k domestic overnight visitors. This is a discrepancy of just over 53k guests.

The following table provides a summary of the uplift/reductions that have been applied to IVS/NVS data that is inputted into the visitor model. It demonstrates that for 2019 data:

- Domestic day visitation to Barcaldine-Blackall SA2 and international visitation to Far Central West SA2 in the NVS and IVS appear to over-state actual visitation. As a result, these two datasets are decreased by -25% and -11% respectively.
- All other visitation is uplifted, ranging from +6% for Barcaldine-Blackall SA2 international visitation to a significant +104% for Longreach's domestic overnight visitation.

Until such a time that the NVS and IVS have a larger and more robust sample size for the CWQ region and its SA2s, it is considered that these uplifts/decreases should continue to be applied.

Because 2020 is an outlier year due to the COVID-19 pandemic, the data for this year has had separate uplifts/reductions applied. These have been based on the previous uplifts/reductions and supplemented with additional in-region consultation and analysis.


Totals	Barcaldine - Blackall		Far Central West				Longreach
	Barcaldine	Blackall-Tambo	Barcoo	Boulia	Diamantina	Winton	Longreach
LGA Visitation (based on this model)							
Domestic Day Trip	23,651	9,350	676	146	213	44,240	60,581
Domestic Overnight	119,113	56,511	33,665	36,671	40,518	95,674	242,911
International Overnight	2,431	1,153	687	748	827	1,953	4,957
Total LGA Visitation	145,195	67,015	35,028	37,566	41,558	141,866	308,449
SA2 Visitation (based on this model)							
Total SA2 Non-Unique Visitation	212,210					256,017	308,449
Domestic Day Trip	33,001					45,274	60,581
Domestic Overnight	146,354					168,321	242,911
International Overnight	2,987					3,435	4,957
Total SA2 Unique Visitation	182,342					217,030	308,449
TRA Data							
Domestic Day	43,818					34,712	36,652
Domestic Overnight	95,892					115,025	118,961
International	2,805					3,876	3,051
Total SA2 Unique Visitation	142,515					153,613	158,664

Uplifts/Reduction Required	Barcaldine - Blackall		Far Central West				Longreach
	Barcaldine	Blackall-Tambo	Barcoo	Boulia	Diamantina	Winton	Longreach
Variance between Model SA2 Data & TRA SA2 Data							
Domestic Day Trip	-10,817				+10,562		+23,929
Domestic Overnight	+50,462				+53,295		+123,950
International	+182				-441		+1,907
Uplift/Reduction Required							
Domestic Day Trip	-25%				+30%		+65%
Domestic Overnight	+53%				+46%		+104%
International	+6%				-11%		+62%
Uplift/Reduction Multiplier							
Domestic Day	75%	75%	130%	130%	130%	130%	165%
Domestic Overnight	153%	153%	146%	146%	146%	146%	204%
International	106%	106%	89%	89%	89%	89%	162%

Overview

In order to make the visitation data easy to access and understand, Dashboards have been created for each LGA in the CWQ region. These Dashboards can be accessed via the internet to enable the data to be more easily disseminated.

The Dashboards are able to be manipulated with a variety of filters. They can be downloaded to PDF or image format.

Note, the Dashboards are best viewed in full screen format (click the full screen button in the bottom right hand corner - ) on a larger display.

The Visitor Profile Dashboard displays:

- a summary of total visitation to all LGAs by all visitor types;
- visitation to the LGA the Dashboard is on, including a breakdown by domestic day, domestic overnight and international visitors for the periods 2014 and 2019;
- a pie chart demonstrating the share of visitation to the LGA by visitor type;
- a pie chart illustrating motivation of visitation to the LGA;
- a heat map on the state of origin where domestic overnight visitors are coming from;
- a box chart demonstrating country of origin where international visitors originate from; and
- a bar chart on average spend per visitor, per trip as well as a summary on total spend in the LGA by visitor type.

The link to access the dashboard is as follows:

https://public.tableau.com/app/profile/rapad/viz/CWQ_Tourism_Dashboard/1_CWQ_Visitor_Profile

or

<https://tinyurl.com/CWQTourismDash>

There are five tabs which users can click on to display different Dashboards. These are indicated below.



Tourism Dashboard, Visitor Profile: Barcaldine LGA

Change the following filters to modify the dashboard.

Select LGA > (Applies to All Boards except #1)

Barcaldine

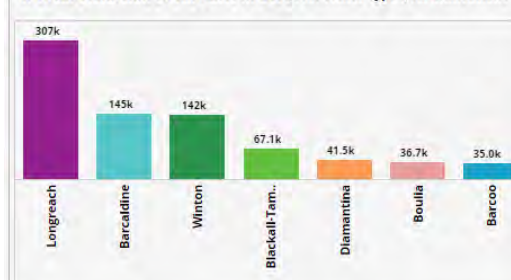
Select Year (June YE) > (Applies to All Boards except #2 & #7)

2019

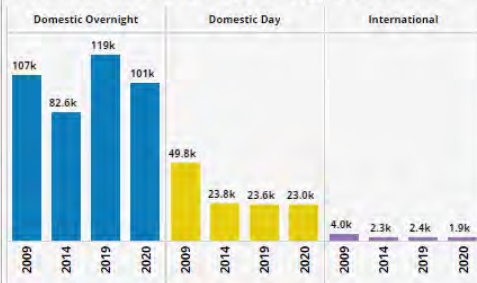
Select Motivation > (Applies to All Boards except #5 and #7)

(All)

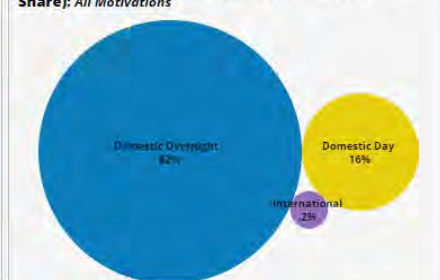
1. Total Visitation to All LGAs in CWQ: All Visitor Types, All Motivations



2. Visitation Barcaldine LGA by Visitor Type: All Motivations



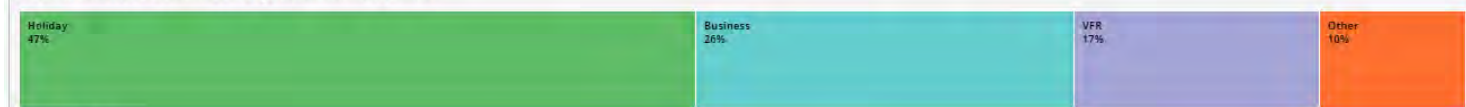
3. Visitation to Barcaldine LGA by Visitor Type (% Share): All Motivations



4. Origin of Domestic Visitors to Barcaldine LGA: All Motivations



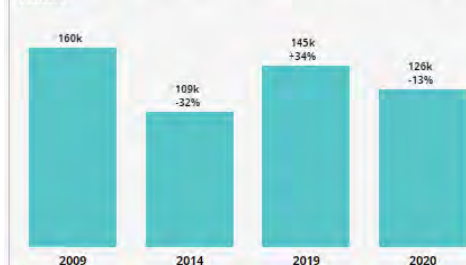
5. Visitation to Barcaldine LGA by Motivation: All Visitors



Select Visitor Type >

(All)

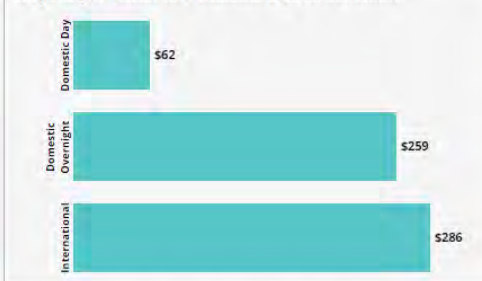
7. YOY Change in Visitation to Barcaldine: All Motivations, All Visitors



Select Visitor Type >

(All)

8. Spend per Visitor in Barcaldine LGA: All Motivations

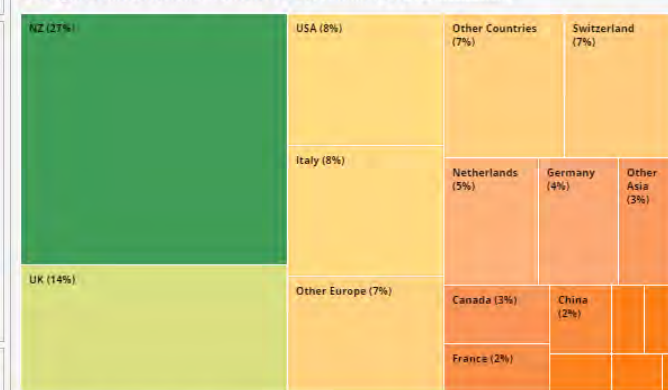


Note, spend per visitor differs by motivation and visitor type. To correctly determine total visitor spend in each LGA, one needs to separate out visitation by motivation and spend per visitor by motivation.

9. Total Visitor Spend in Barcaldine LGA: All Motivations



6. Origin of International Visitors to Barcaldine LGA: All Motivations



Data is based on Tourism Research Australia's National Visitor Survey and International Visitor Survey and supplemented with in depth stakeholder consultation and data received from stakeholders, including accommodation occupancy rates, event ticket sales data, attraction ticket sales data as well as VIC enquiries and others. Stafford Strategy accepts no responsibility or liability for errors, omissions, or resultant consequences, including any loss or damage arising from relying upon information in this publication.

Tourism Dashboard, Visitor Profile: Barcoo LGA

Change the following filters to modify the dashboard.

Select LGA > (Applies to All Boards except #1)

Select Year (June YE) > (Applies to All Boards except #2 & #7)

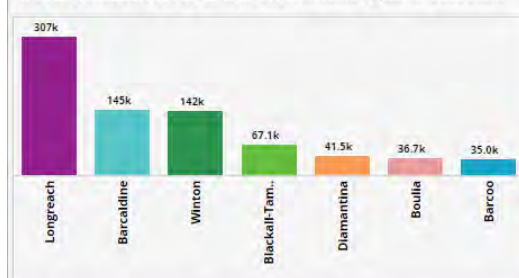
Select Motivation > (Applies to All Boards except #5 and #7)

Barcoo

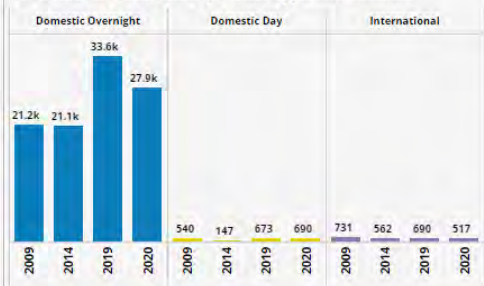
2019

(All)

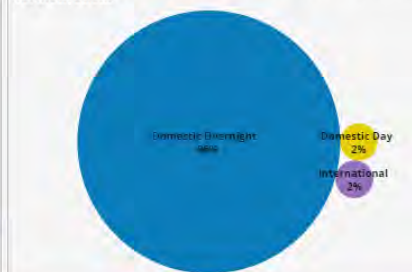
1. Total Visitation to All LGAs in CWQ: All Visitor Types, All Motivations



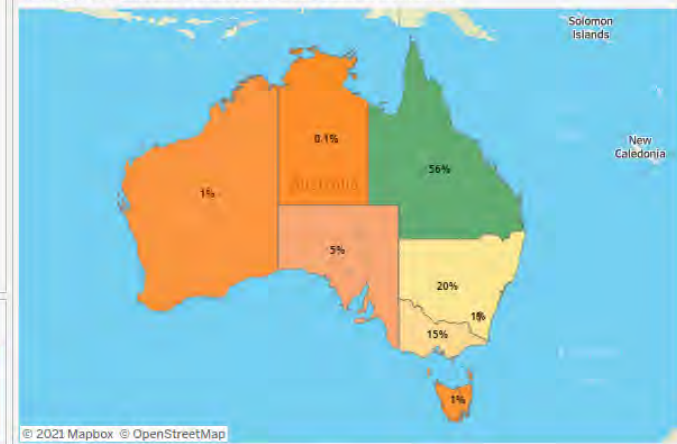
2. Visitation Barcoo LGA by Visitor Type: All Motivations



3. Visitation to Barcoo LGA by Visitor Type (% Share): All Motivations



4. Origin of Domestic Visitors to Barcoo LGA: All Motivations



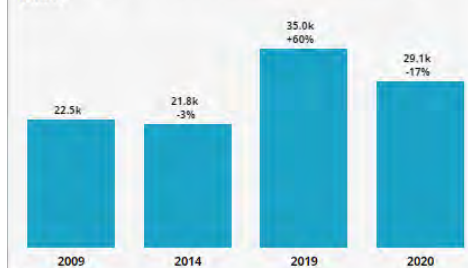
5. Visitation to Barcoo LGA by Motivation: All Visitors



Select Visitor Type >

(All)

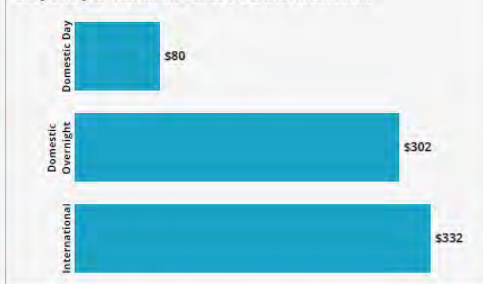
7. YOY Change in Visitation to Barcoo: All Motivations, All Visitors



Select Visitor Type >

(All)

8. Spend per Visitor in Barcoo LGA: All Motivations

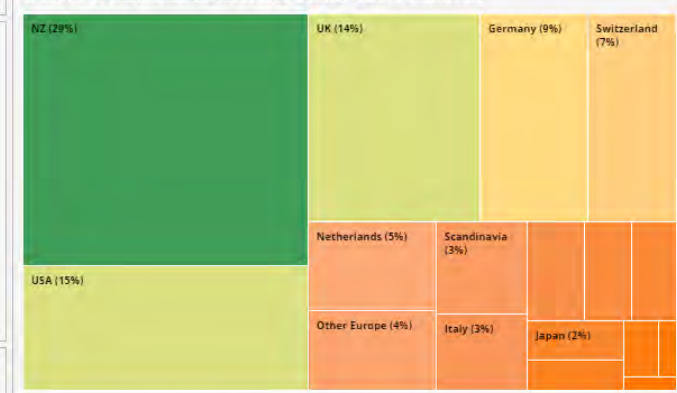


Note, spend per visitor differs by motivation and visitor type. To correctly determine total visitor spend in each LGA, one needs to separate out visitation by motivation and spend per visitor by motivation.

9. Total Visitor Spend in Barcoo LGA: All Motivations



6. Origin of International Visitors to Barcoo LGA: All Motivations



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Tourism Dashboard, Visitor Profile: Blackall-Tambo LGA

Change the following filters to modify the dashboard.

Select LGA > (Applies to All Boards except #1)

Blackall-Tambo

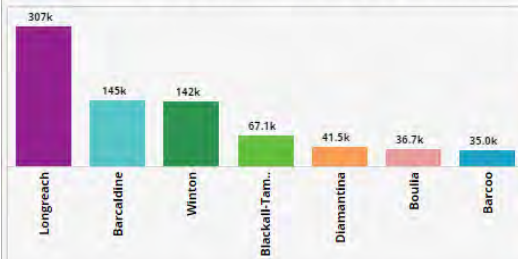
Select Year (June YE) > (Applies to All Boards except #2 & #7)

2019

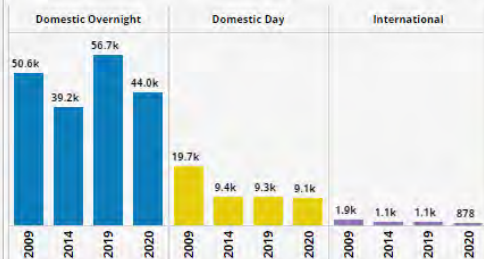
Select Motivation > (Applies to All Boards except #5 and #7)

(All)

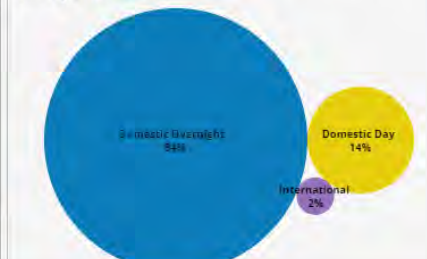
1. Total Visitation to All LGAs in CWQ: All Visitor Types, All Motivations



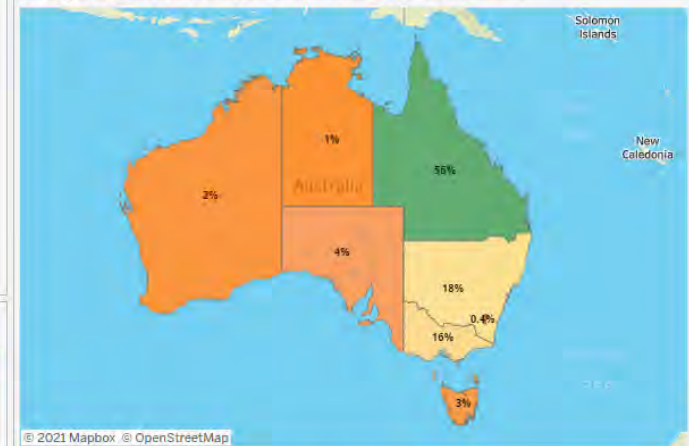
2. Visitation Blackall-Tambo LGA by Visitor Type: All Motivations



3. Visitation to Blackall-Tambo LGA by Visitor Type (% Share): All Motivations



4. Origin of Domestic Visitors to Blackall-Tambo LGA: All Motivations

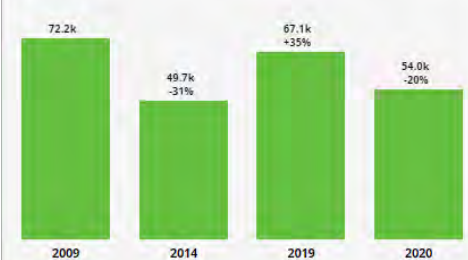


5. Visitation to Blackall-Tambo LGA by Motivation: All Visitors



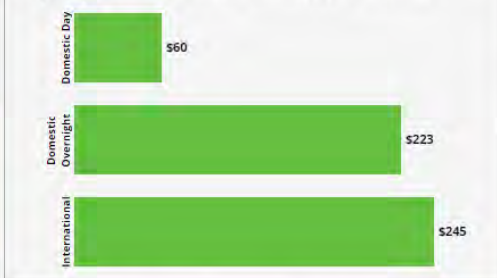
Select Visitor Type > (All)

7. YOY Change in Visitation to Blackall-Tambo: All Motivations, All Visitors



Select Visitor Type > (All)

8. Spend per Visitor in Blackall-Tambo LGA: All Motivations

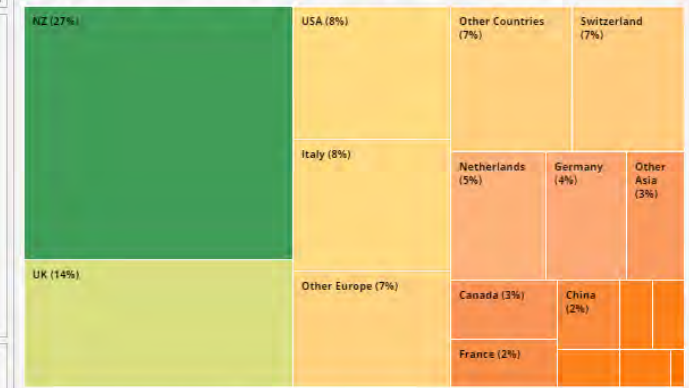


Note, spend per visitor differs by motivation and visitor type. To correctly determine total visitor spend in each LGA, one needs to separate out visitation by motivation and spend per visitor by motivation.

9. Total Visitor Spend in Blackall-Tambo LGA: All Motivations



6. Origin of International Visitors to Blackall-Tambo LGA: All Motivations



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Tourism Dashboard, Visitor Profile: Boulia LGA

Change the following filters to modify the dashboard.

Select LGA > (Applies to All Boards except #1)

Select Year (June YE) > (Applies to All Boards except #2 & #7)

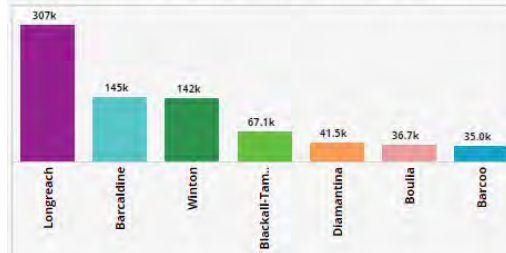
Select Motivation > (Applies to All Boards except #5 and #7)

Boulia

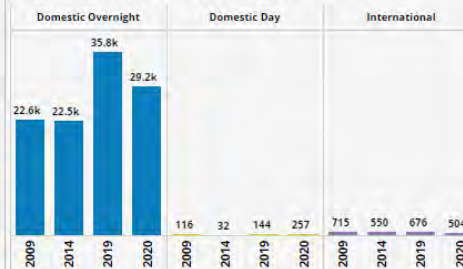
2019

(All)

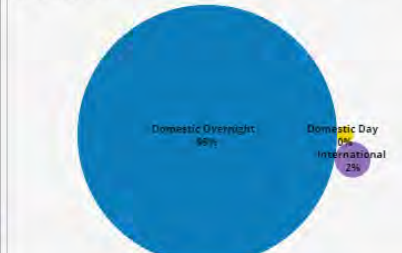
1. Total Visitation to All LGAs in CWQ: All Visitor Types, All Motivations



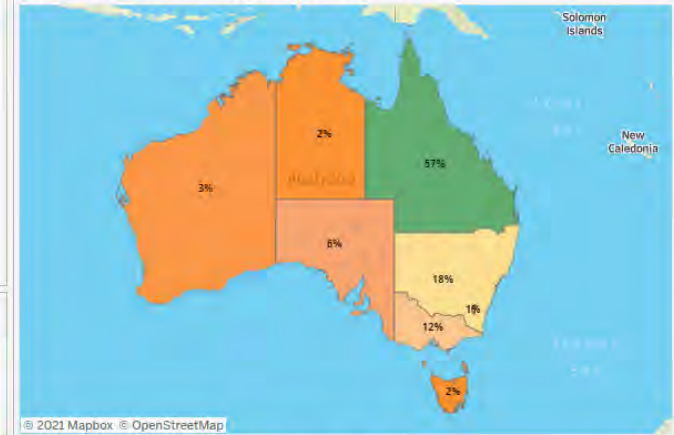
2. Visitation Boulia LGA by Visitor Type: All Motivations



3. Visitation to Boulia LGA by Visitor Type (% Share): All Motivations



4. Origin of Domestic Visitors to Boulia LGA: All Motivations



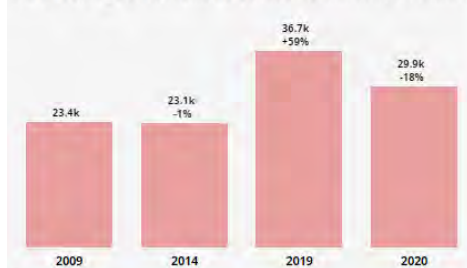
5. Visitation to Boulia LGA by Motivation: All Visitors



Select Visitor Type >

(All)

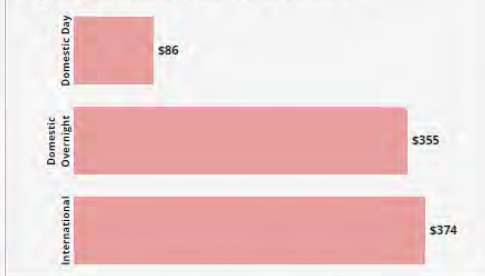
7. YOY Change in Visitation to Boulia: All Motivations, All Visitors



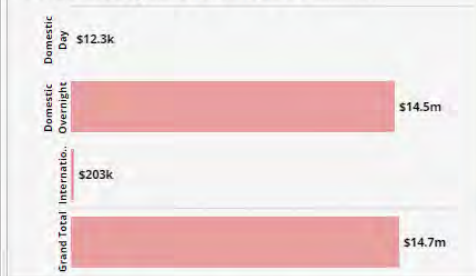
Select Visitor Type >

(All)

8. Spend per Visitor in Boulia LGA: All Motivations

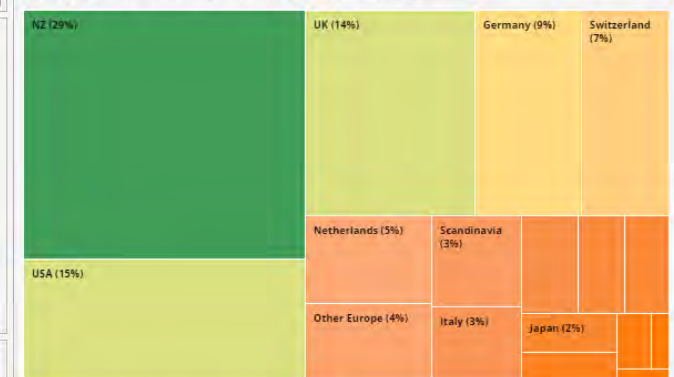


9. Total Visitor Spend in Boulia LGA: All Motivations



Note, spend per visitor differs by motivation and visitor type. To correctly determine total visitor spend in each LGA, one needs to separate out visitation by motivation and spend per visitor by motivation.

6. Origin of International Visitors to Boulia LGA: All Motivations



Data is based on Tourism Research Australia's National Visitor Survey and International Visitor Survey and supplemented with in depth stakeholder consultation and data received from stakeholders, including accommodation occupancy rates, event ticket sales data, attraction ticket sales data as well as VIC enquiries and others. Stafford Strategy accepts no responsibility or liability for errors, omissions, or resultant consequences, including any loss or damage arising from relying upon information in this publication.

Tourism Dashboard, Visitor Profile: Diamantina LGA

Change the following filters to modify the dashboard.

Select LGA > (Applies to All Boards except #1)

Diamantina

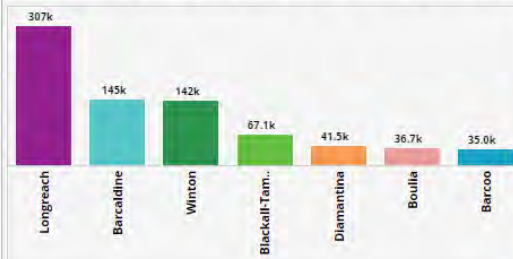
Select Year (June YE) > (Applies to All Boards except #2 & #7)

2019

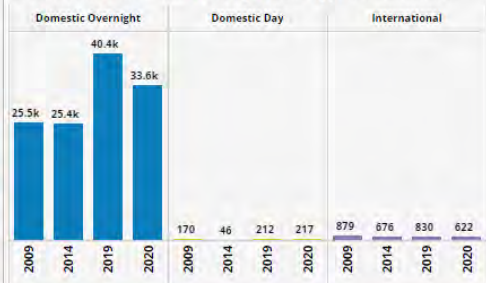
Select Motivation > (Applies to All Boards except #5 and #7)

(All)

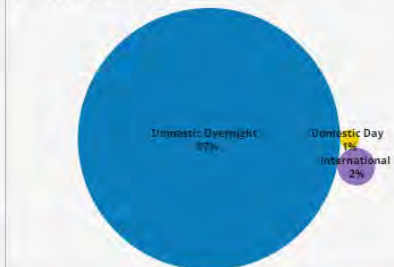
1. Total Visitation to All LGAs in CWQ: All Visitor Types, All Motivations



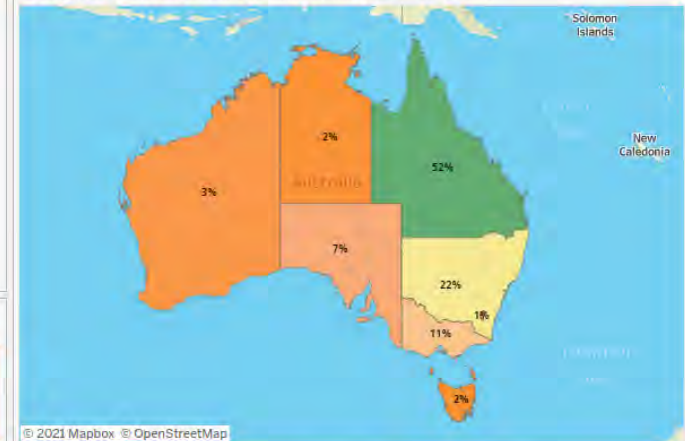
2. Visitation Diamantina LGA by Visitor Type: All Motivations



3. Visitation to Diamantina LGA by Visitor Type (% Share): All Motivations



4. Origin of Domestic Visitors to Diamantina LGA: All Motivations

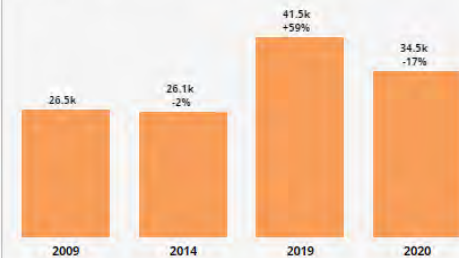


5. Visitation to Diamantina LGA by Motivation: All Visitors



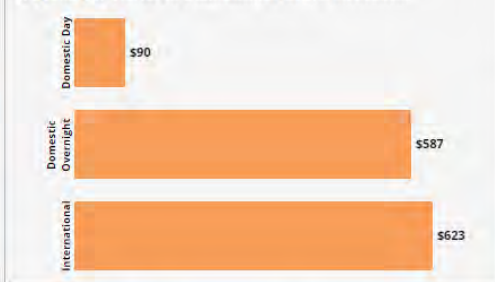
Select Visitor Type > (All)

7. YOY Change in Visitation to Diamantina: All Motivations, All Visitors



Select Visitor Type > (All)

8. Spend per Visitor in Diamantina LGA: All Motivations

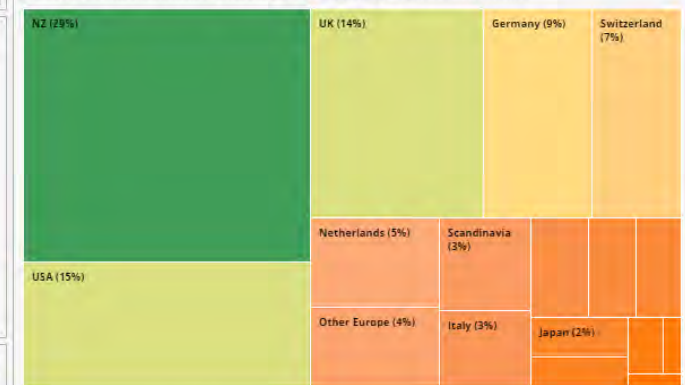


Note, spend per visitor differs by motivation and visitor type. To correctly determine total visitor spend in each LGA, one needs to separate out visitation by motivation and spend per visitor by motivation.

9. Total Visitor Spend in Diamantina LGA: All Motivations



6. Origin of International Visitors to Diamantina LGA: All Motivations



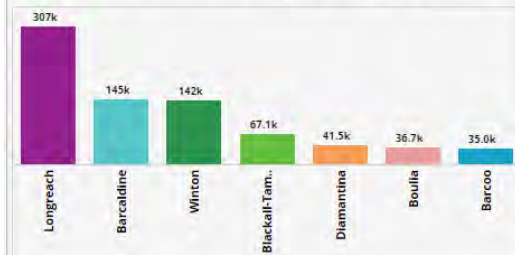
Data is based on Tourism Research Australia's National Visitor Survey and International Visitor Survey and supplemented with in depth stakeholder consultation and data received from stakeholders, including accommodation occupancy rates, event ticket sales data, attraction ticket sales data as well as VIC enquiries and others. Stafford Strategy accepts no responsibility or liability for errors, omissions, or resultant consequences, including any loss or damage arising from relying upon information in this publication.

Tourism Dashboard, Visitor Profile: Longreach LGA

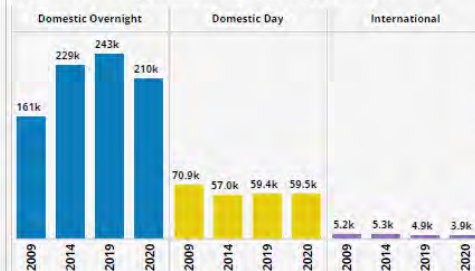
Change the following filters to modify the dashboard.

Select LGA > (Applies to All Boards except #1) Longreach | Select Year (June YE) > (Applies to All Boards except #2 & #7) 2019 | Select Motivation > (Applies to All Boards except #5 and #7) (All)

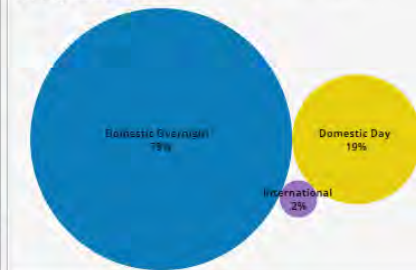
1. Total Visitation to All LGAs in CWQ: All Visitor Types, All Motivations



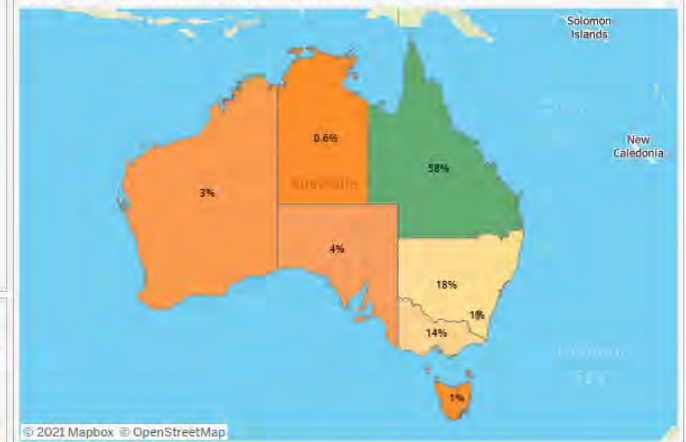
2. Visitation Longreach LGA by Visitor Type: All Motivations



3. Visitation to Longreach LGA by Visitor Type (% Share): All Motivations



4. Origin of Domestic Visitors to Longreach LGA: All Motivations

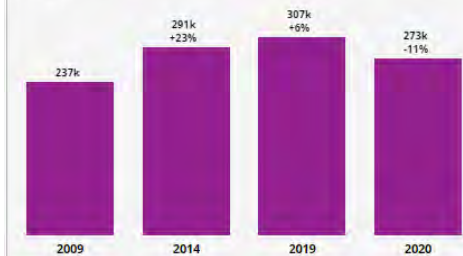


5. Visitation to Longreach LGA by Motivation: All Visitors



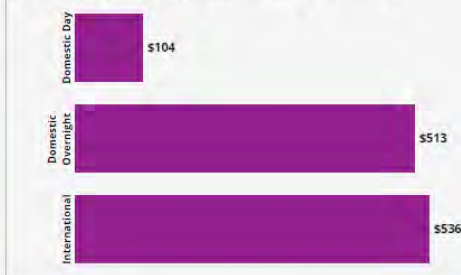
Select Visitor Type > (All)

7. YOY Change in Visitation to Longreach: All Motivations, All Visitors



Select Visitor Type > (All)

8. Spend per Visitor in Longreach LGA: All Motivations

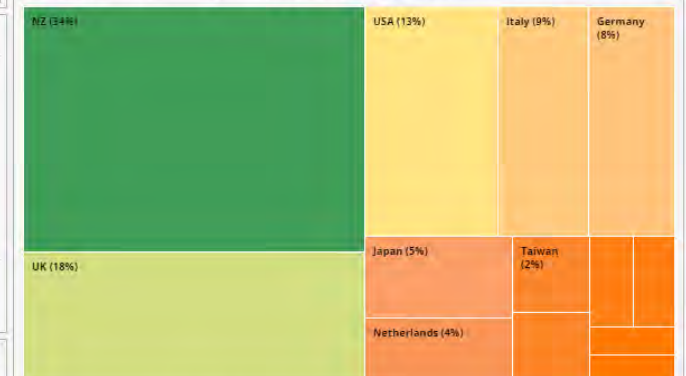


Note, spend per visitor differs by motivation and visitor type. To correctly determine total visitor spend in each LGA, one needs to separate out visitation by motivation and spend per visitor by motivation.

9. Total Visitor Spend in Longreach LGA: All Motivations



6. Origin of International Visitors to Longreach LGA: All Motivations



Data is based on Tourism Research Australia's National Visitor Survey and International Visitor Survey and supplemented with in depth stakeholder consultation and data received from stakeholders, including accommodation occupancy rates, event ticket sales data, attraction ticket sales data as well as VIC enquiries and others. Stafford Strategy accepts no responsibility or liability for errors, omissions, or resultant consequences, including any loss or damage arising from relying upon information in this publication.

Tourism Dashboard, Visitor Profile: Winton LGA

Change the following filters to modify the dashboard.

Select LGA > (Applies to All Boards except #1)

Winton

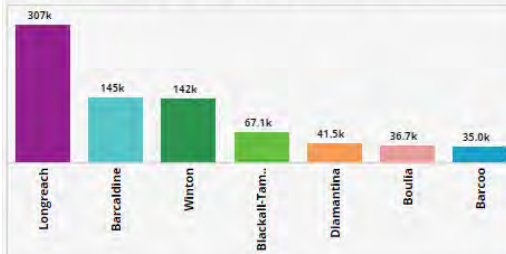
Select Year (June YE) > (Applies to All Boards except #2 & #7)

2019

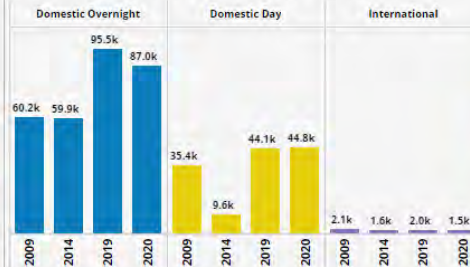
Select Motivation > (Applies to All Boards except #5 and #7)

(All)

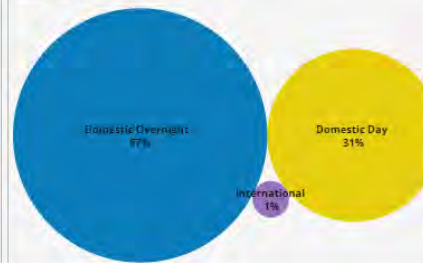
1. Total Visitation to All LGAs in CWQ: All Visitor Types, All Motivations



2. Visitation Winton LGA by Visitor Type: All Motivations



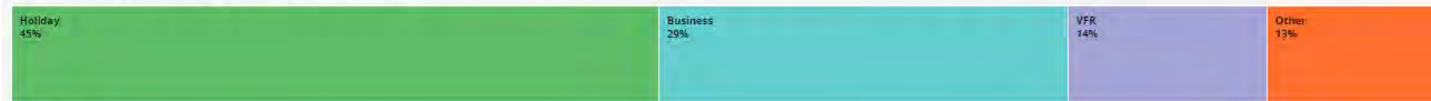
3. Visitation to Winton LGA by Visitor Type (% Share): All Motivations



4. Origin of Domestic Visitors to Winton LGA: All Motivations



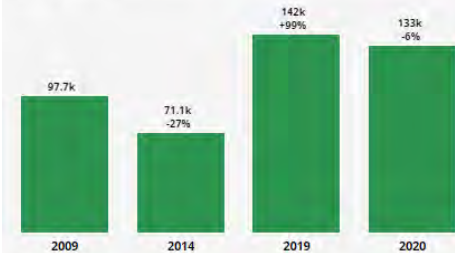
5. Visitation to Winton LGA by Motivation: All Visitors



Select Visitor Type >

(All)

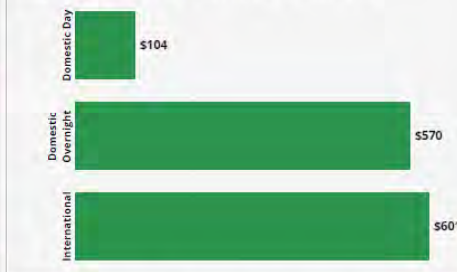
7. YOY Change in Visitation to Winton: All Motivations, All Visitors



Select Visitor Type >

(All)

8. Spend per Visitor in Winton LGA: All Motivations

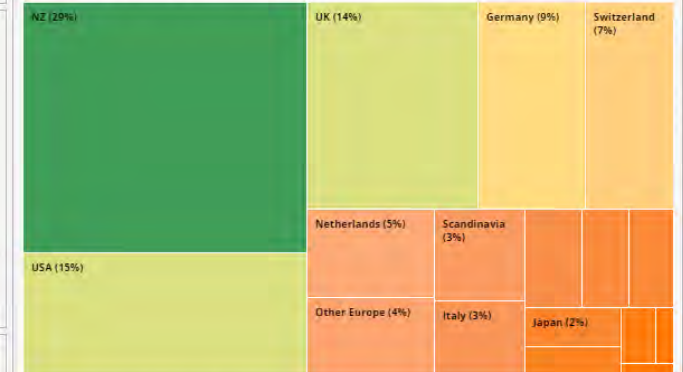


Note, spend per visitor differs by motivation and visitor type. To correctly determine total visitor spend in each LGA, one needs to separate out visitation by motivation and spend per visitor by motivation.

9. Total Visitor Spend in Winton LGA: All Motivations



6. Origin of International Visitors to Winton LGA: All Motivations



Data is based on Tourism Research Australia's National Visitor Survey and International Visitor Survey and supplemented with in depth stakeholder consultation and data received from stakeholders, including accommodation occupancy rates, event ticket sales data, attraction ticket sales data as well as VIC enquiries and others. Stafford Strategy accepts no responsibility or liability for errors, omissions, or resultant consequences, including any loss or damage arising from relying upon information in this publication.

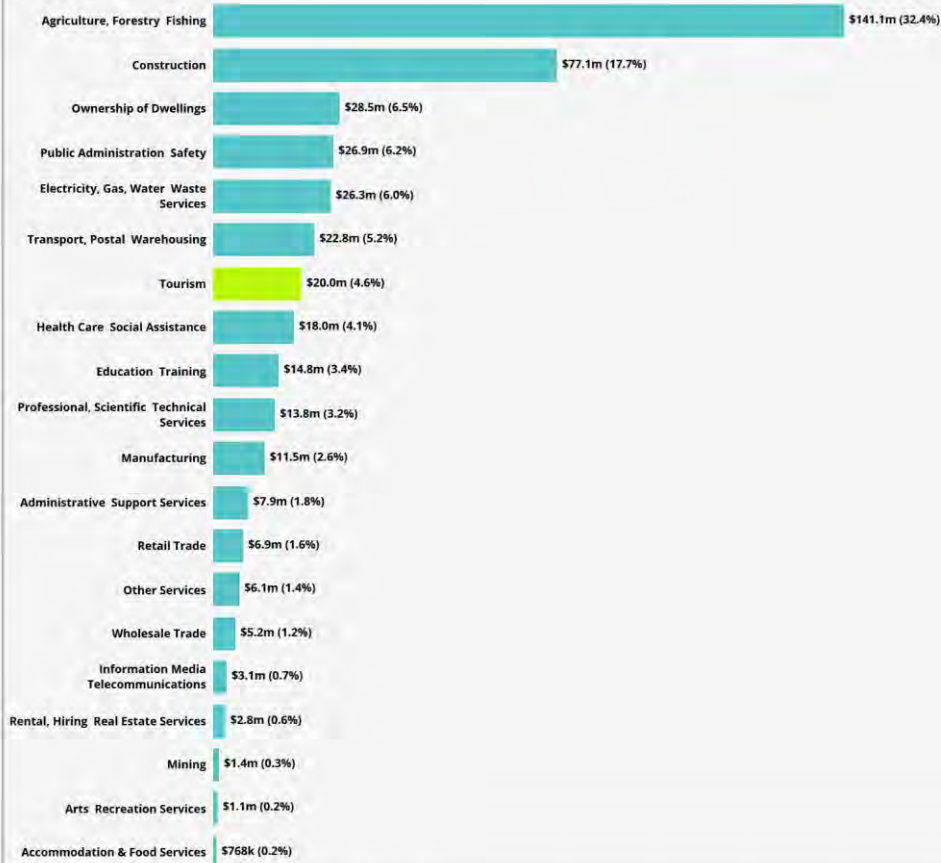
Tourism Dashboard, Economic Profile (2019): Barcaldine LGA

Based on 2019 data supplied by the Department of State Development, Tourism and Innovation

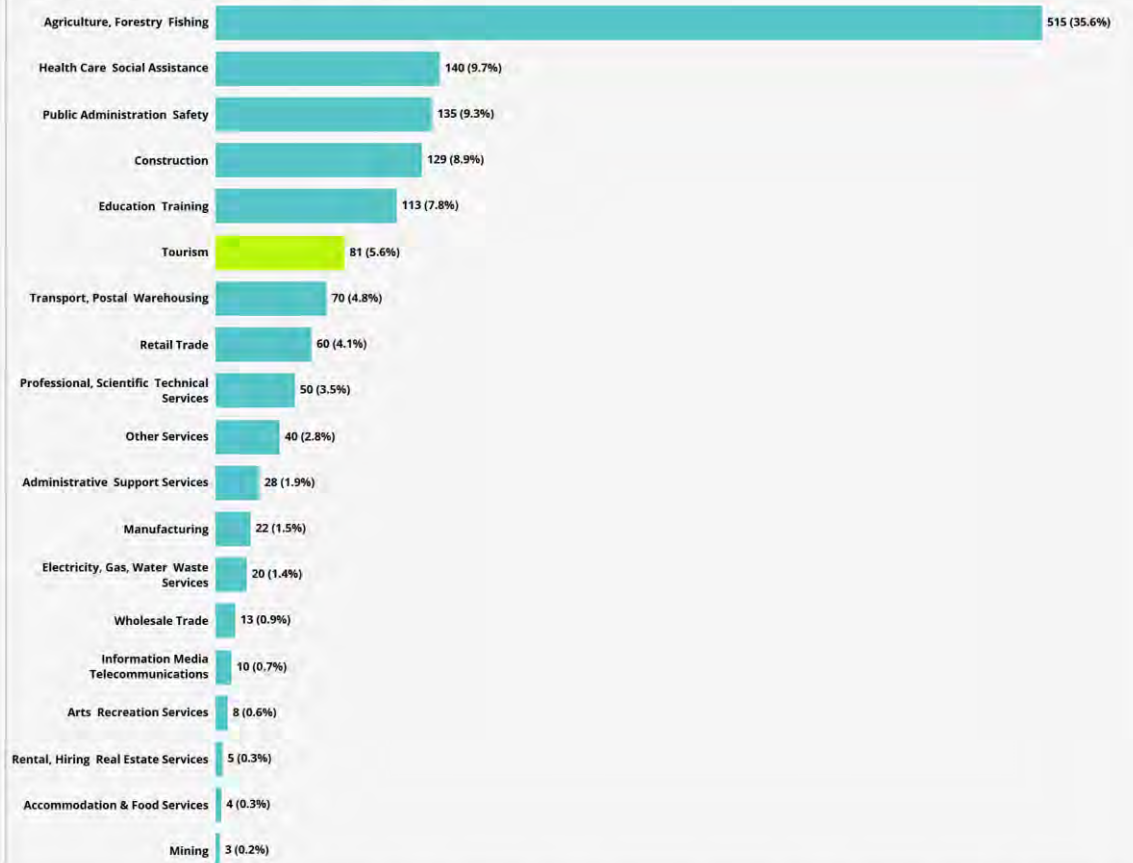
Change the following filter to modify the dashboard.

Select LGA >
Barcaldine

Output by Sector, including Tourism (2019)



Employment by Sector, including Tourism (2019)



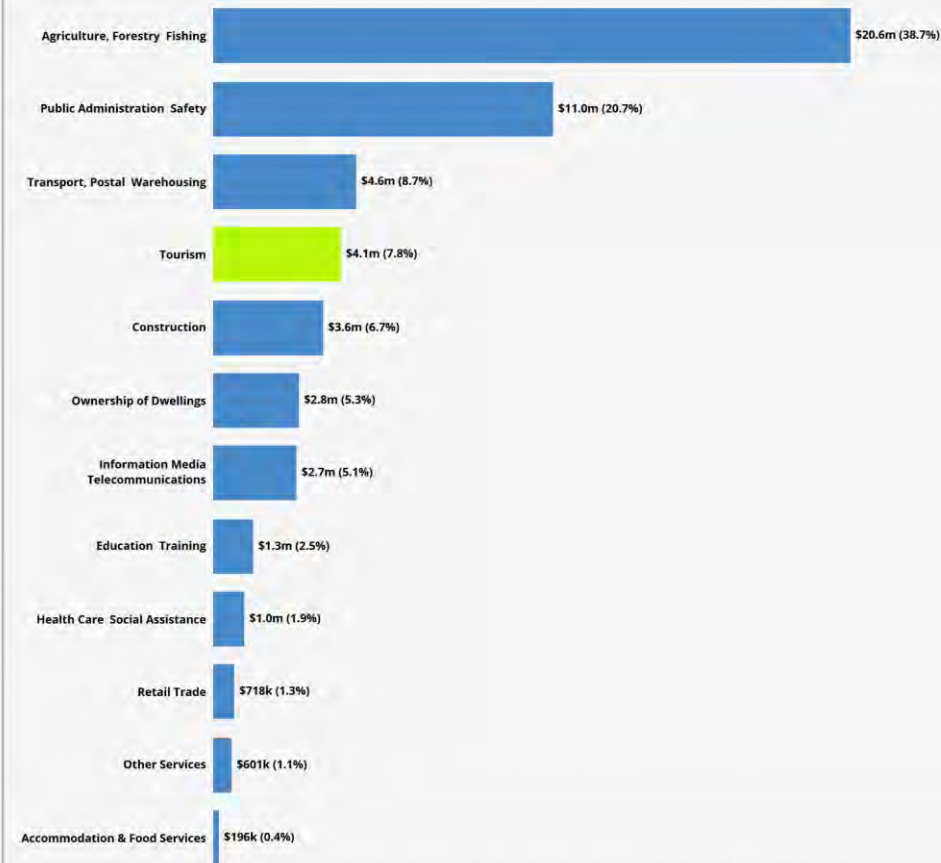
Tourism Dashboard, Economic Profile (2019): Barcoo LGA

Based on 2019 data supplied by the Department of State Development, Tourism and Innovation

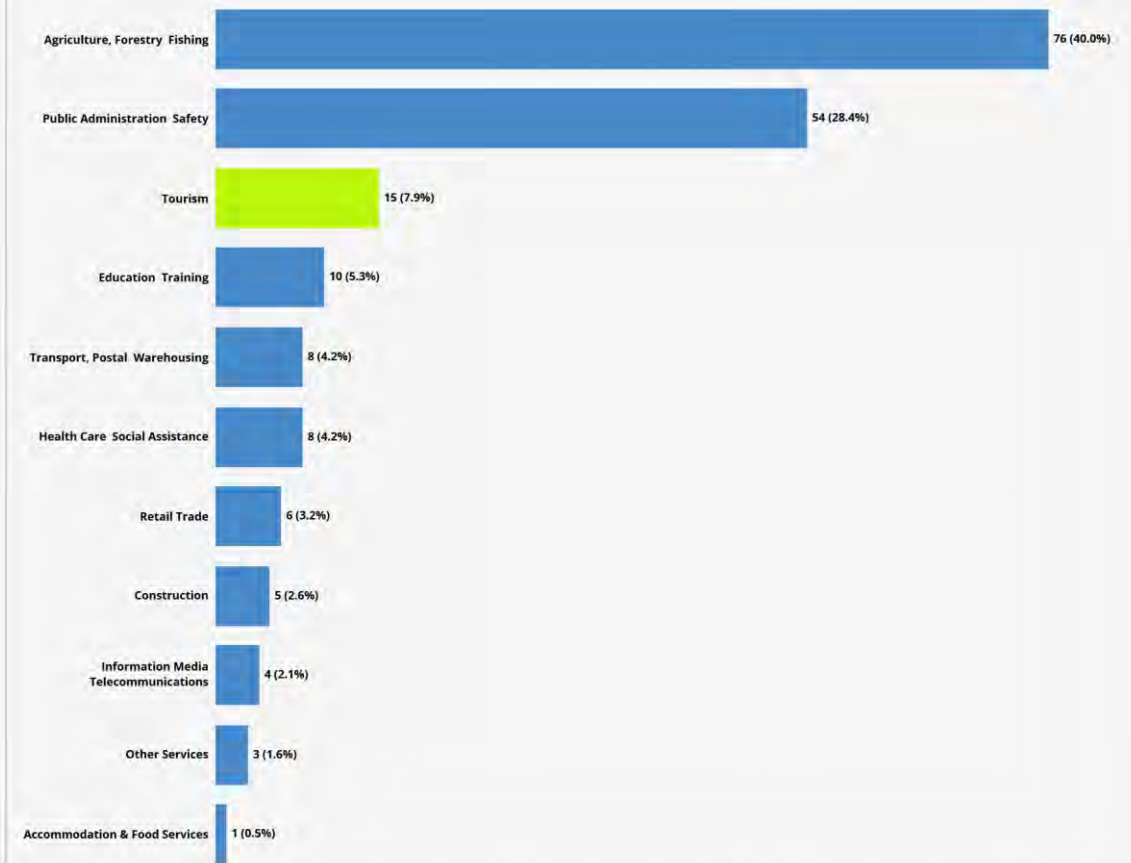
Change the following filter to modify the dashboard.

Select LGA >
Barcoo

Output by Sector, including Tourism (2019)



Employment by Sector, including Tourism (2019)



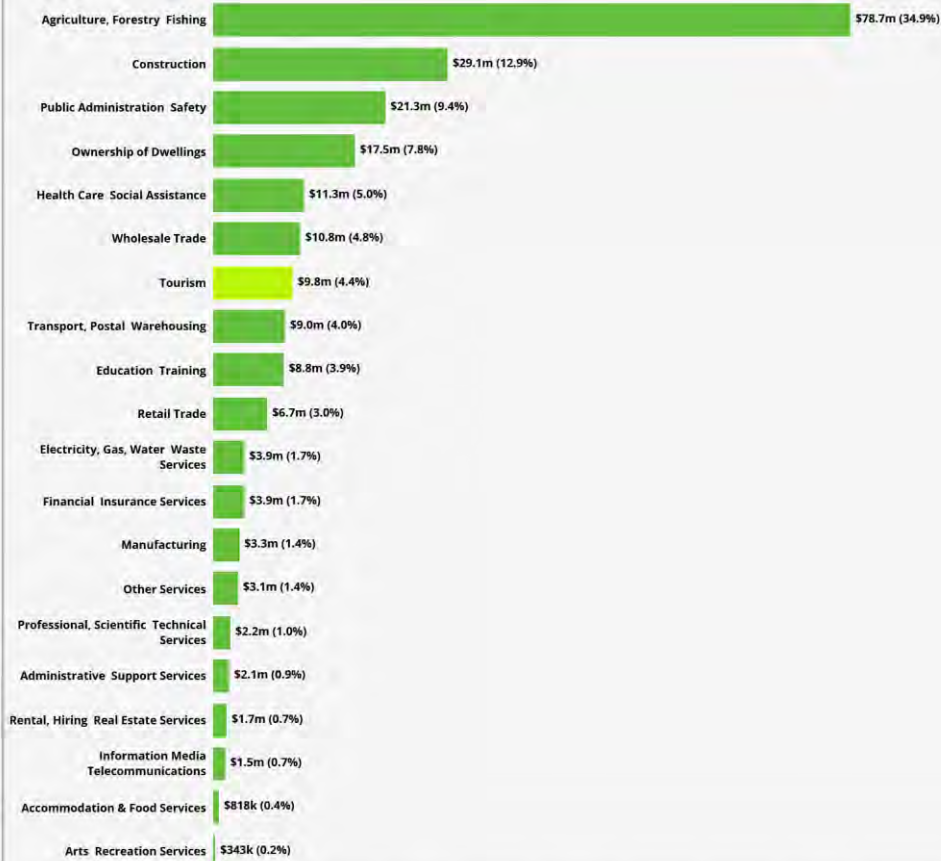
Tourism Dashboard, Economic Profile (2019): Blackall-Tambo LGA

Based on 2019 data supplied by the Department of State Development, Tourism and Innovation

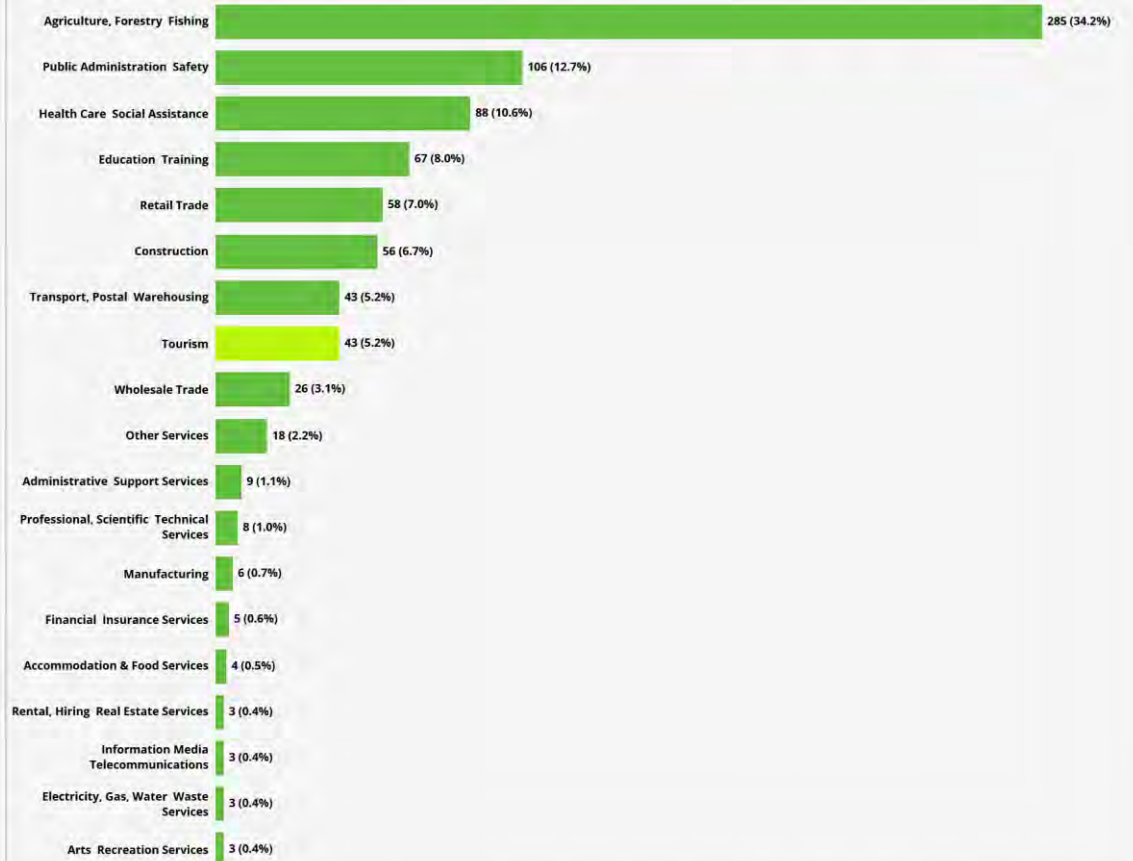
Change the following filter to modify the dashboard.

Select LGA >
Blackall-Tambo

Output by Sector, including Tourism (2019)



Employment by Sector, including Tourism (2019)



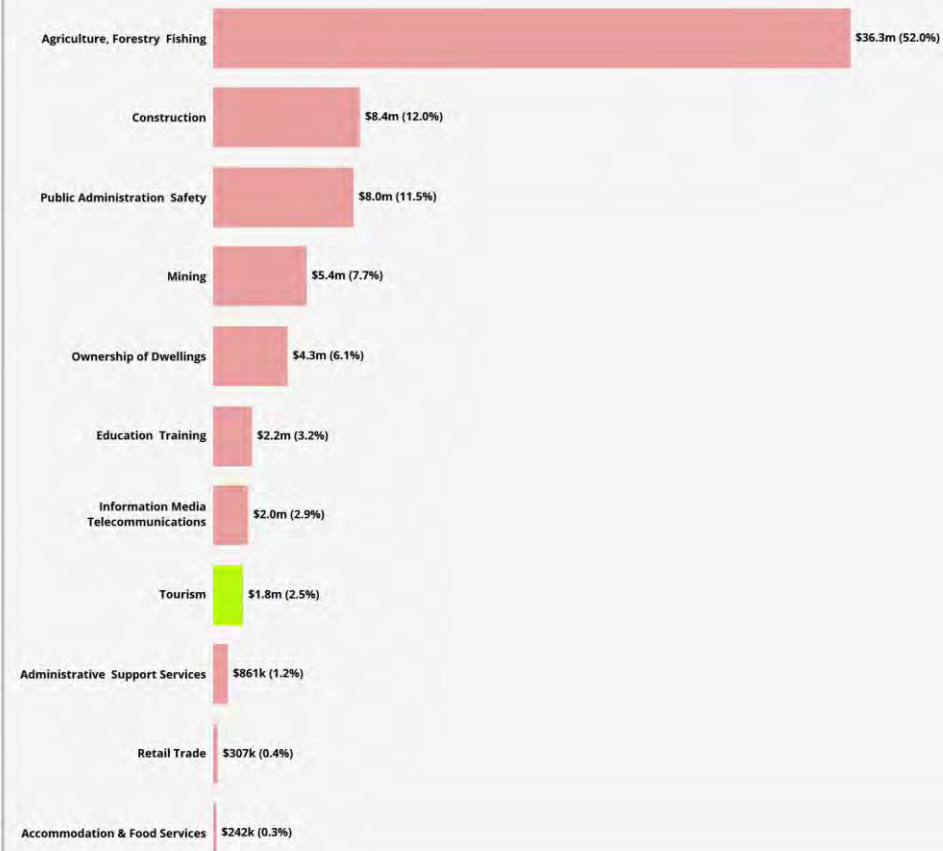
Tourism Dashboard, Economic Profile (2019): Boulia LGA

Based on 2019 data supplied by the Department of State Development, Tourism and Innovation

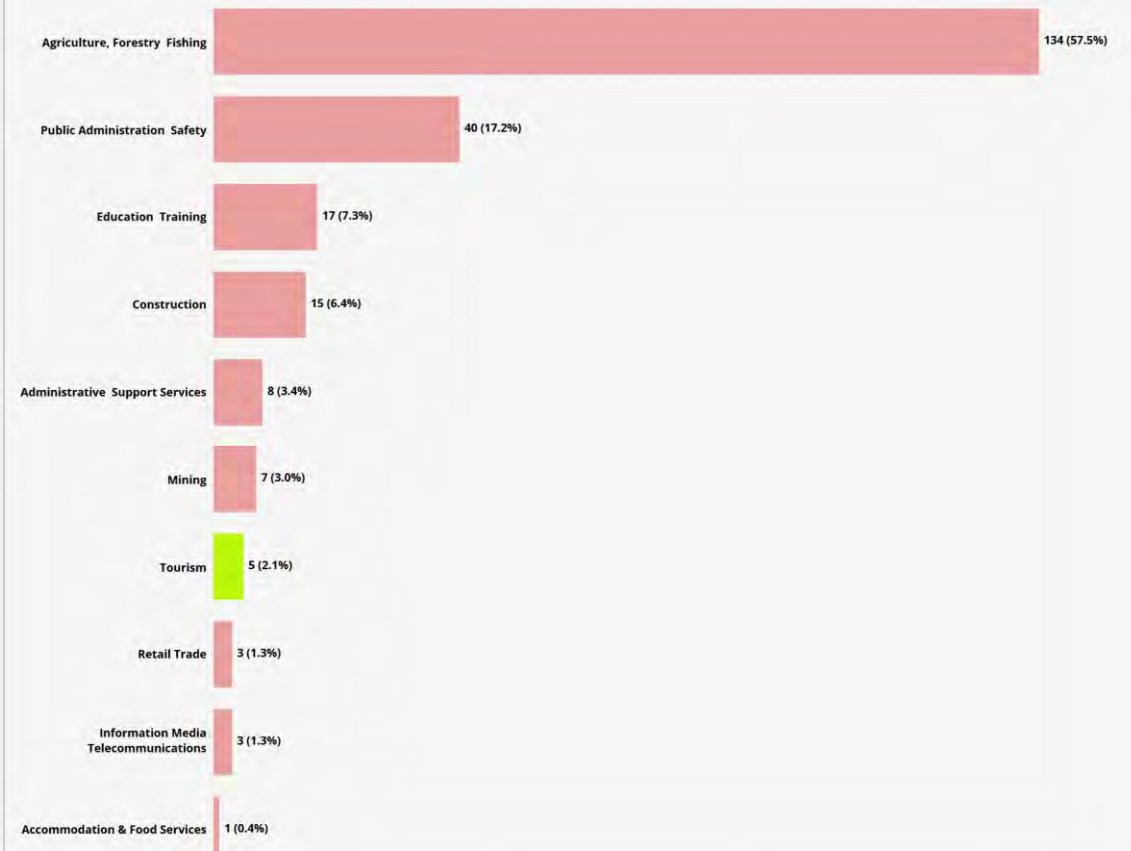
Change the following filter to modify the dashboard.

Select LGA >
Boulia

Output by Sector, including Tourism (2019)



Employment by Sector, including Tourism (2019)



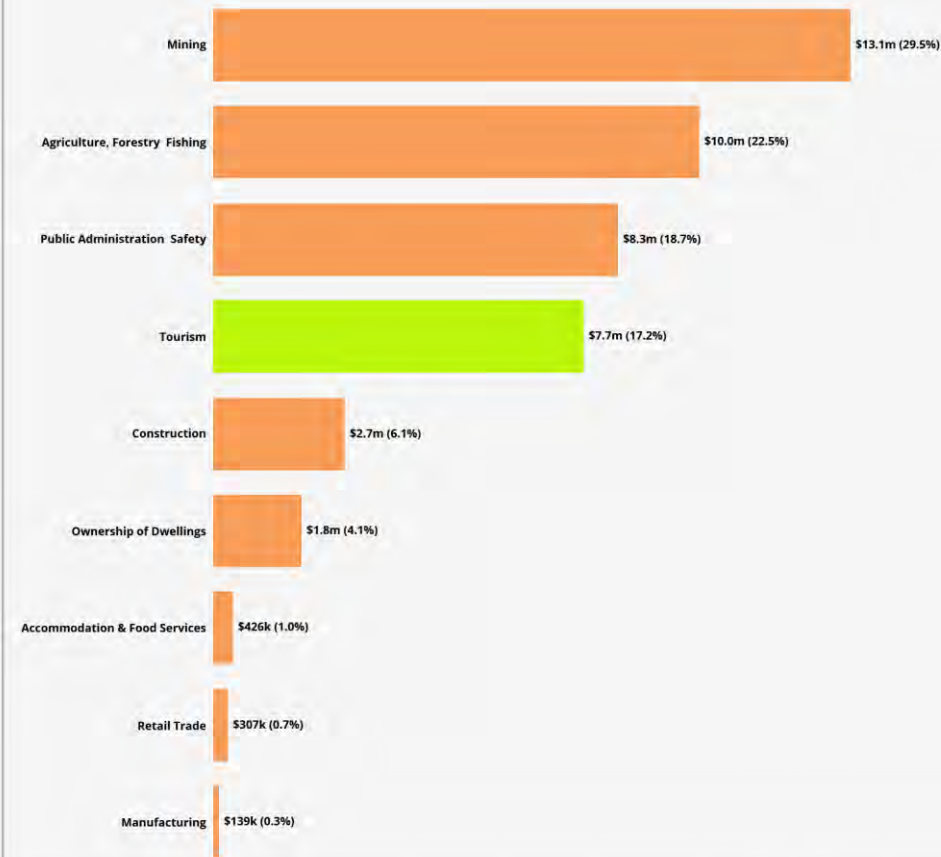
Tourism Dashboard, Economic Profile (2019): Diamantina LGA

Based on 2019 data supplied by the Department of State Development, Tourism and Innovation

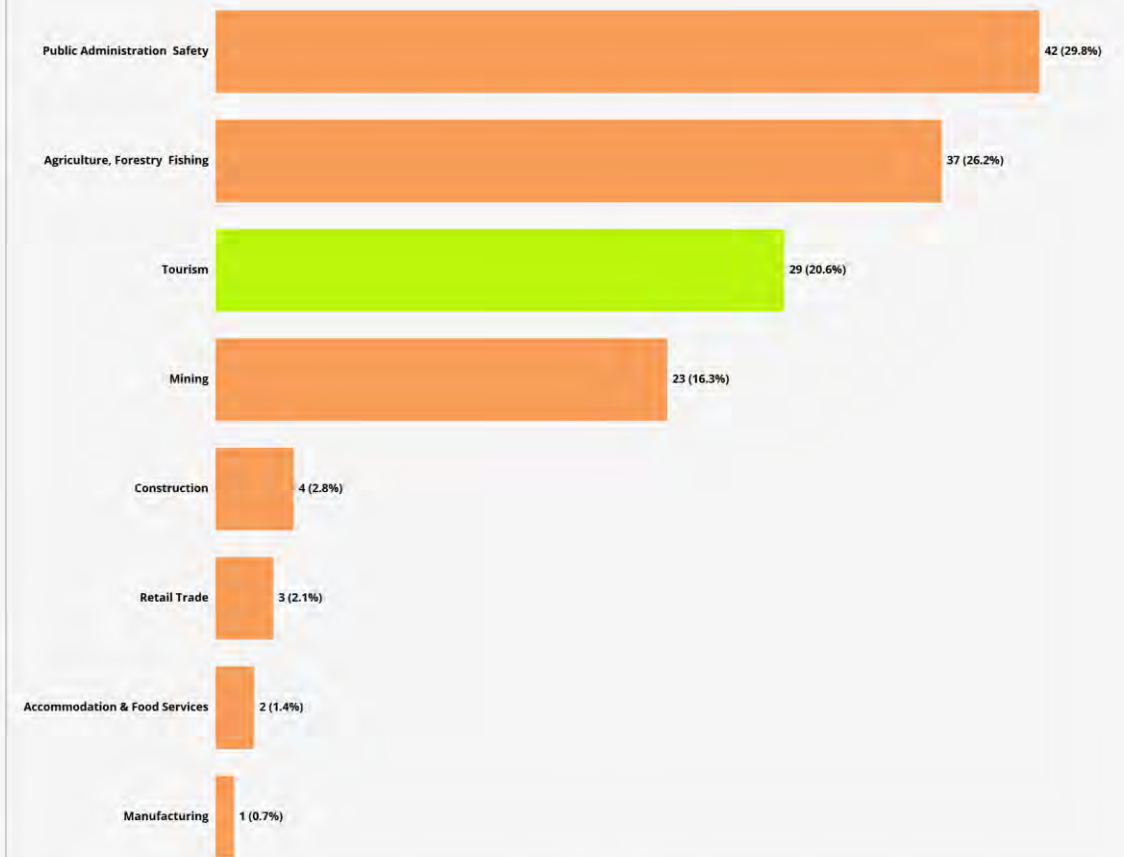
Change the following filter to modify the dashboard.

Select LGA >
Diamantina

Output by Sector, including Tourism (2019)



Employment by Sector, including Tourism (2019)



Tourism Dashboard, Economic Profile (2019): Longreach LGA

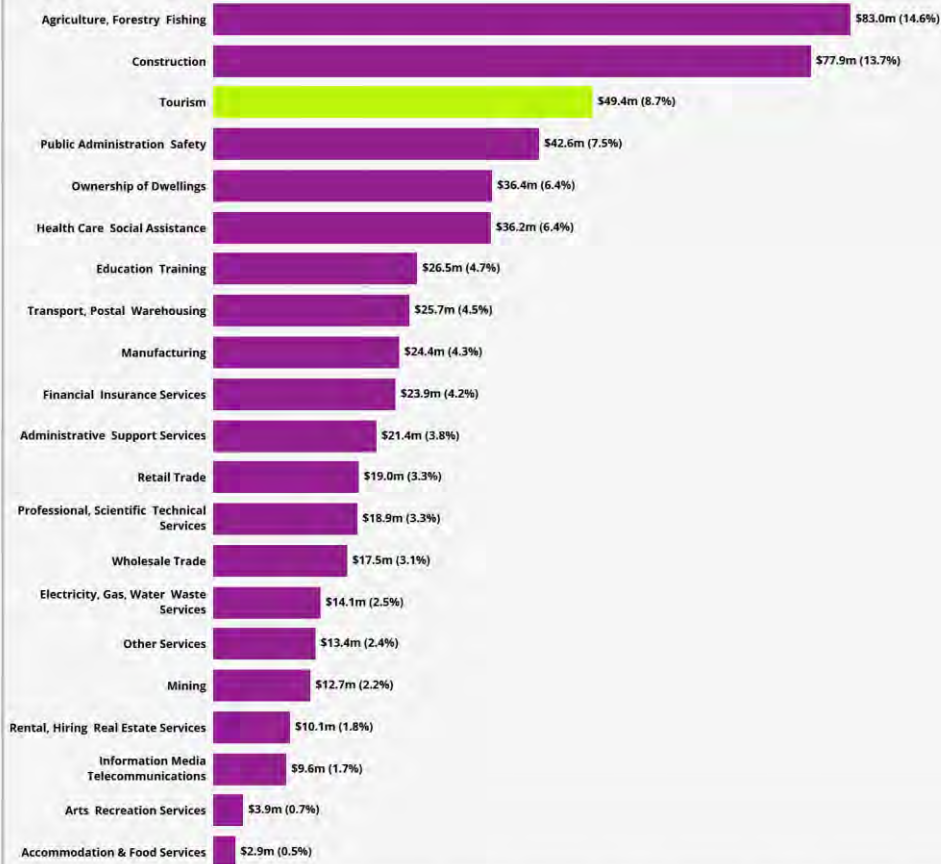
Based on 2019 data supplied by the Department of State Development, Tourism and Innovation

Change the following filter to modify the dashboard.

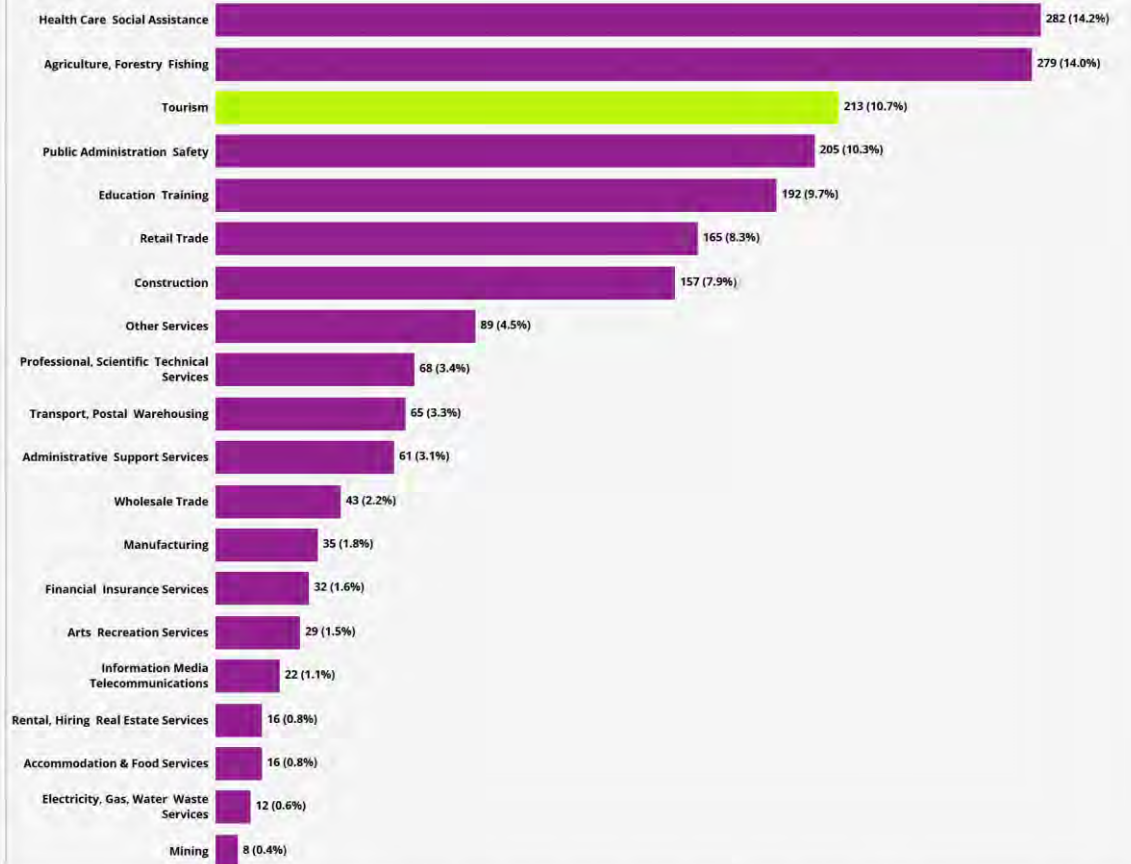
Select LGA >

Longreach

Output by Sector, including Tourism (2019)



Employment by Sector, including Tourism (2019)



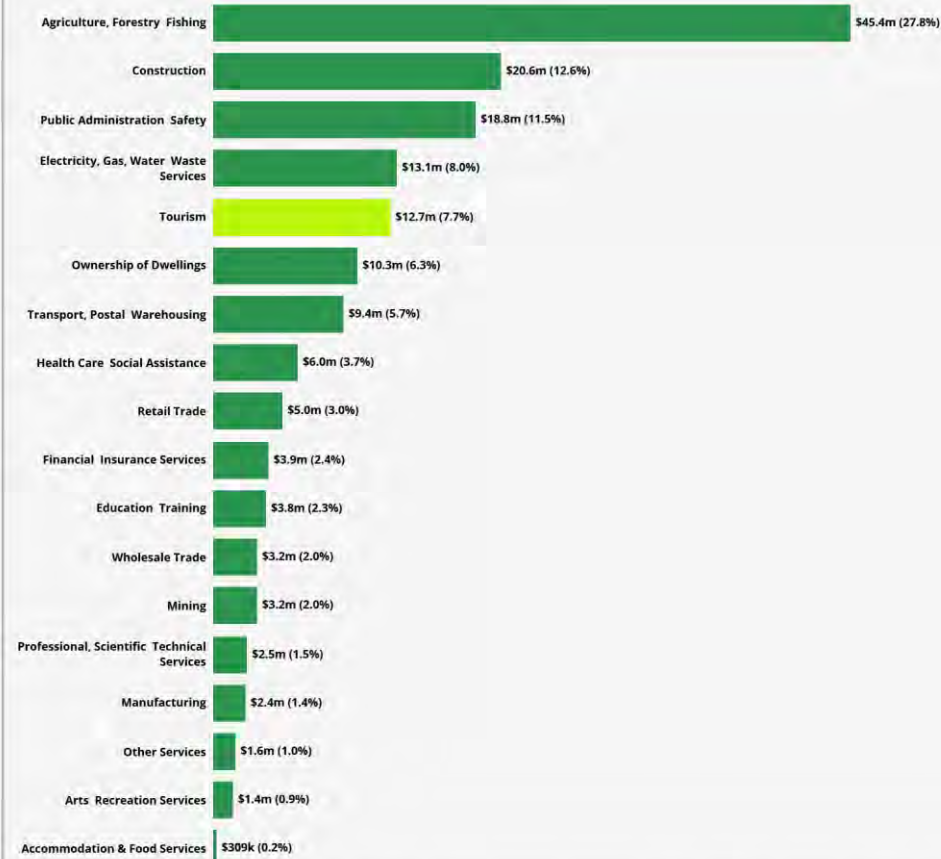
Tourism Dashboard, Economic Profile (2019): Winton LGA

Based on 2019 data supplied by the Department of State Development, Tourism and Innovation

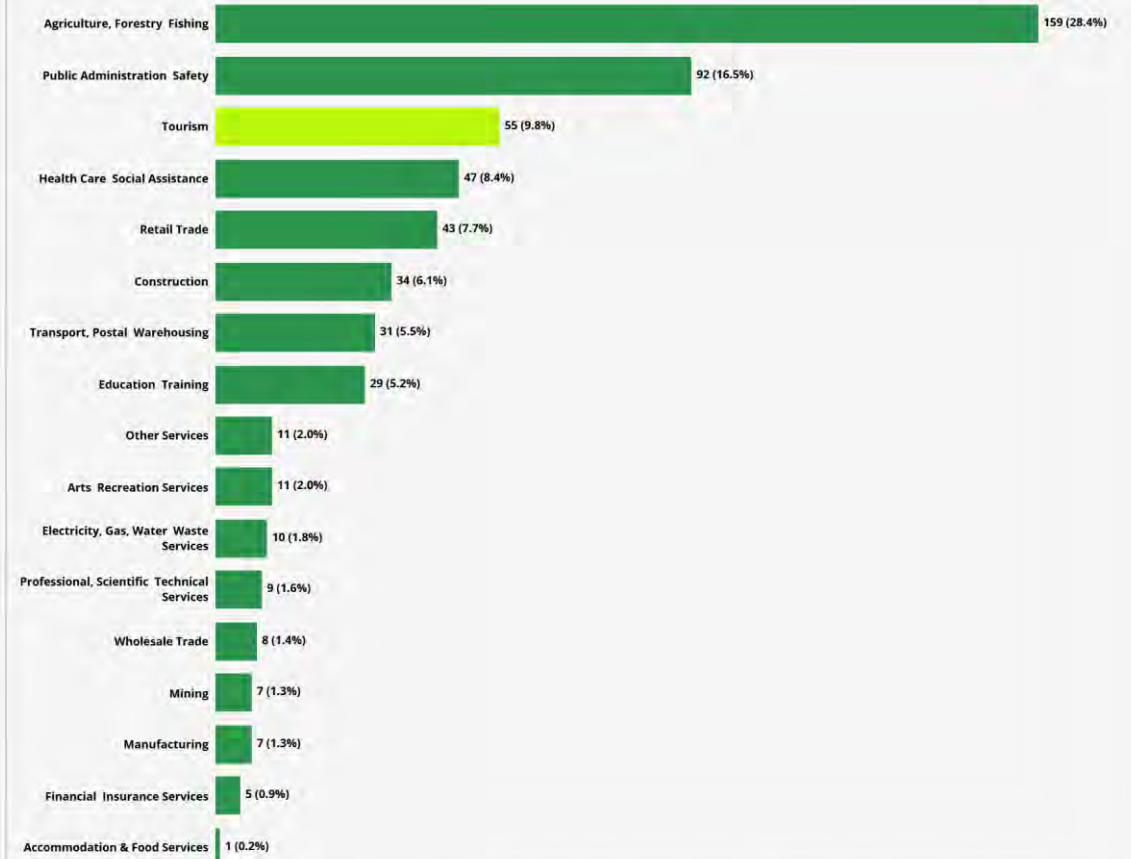
Change the following filter to modify the dashboard.

Select LGA >
Winton

Output by Sector, including Tourism (2019)



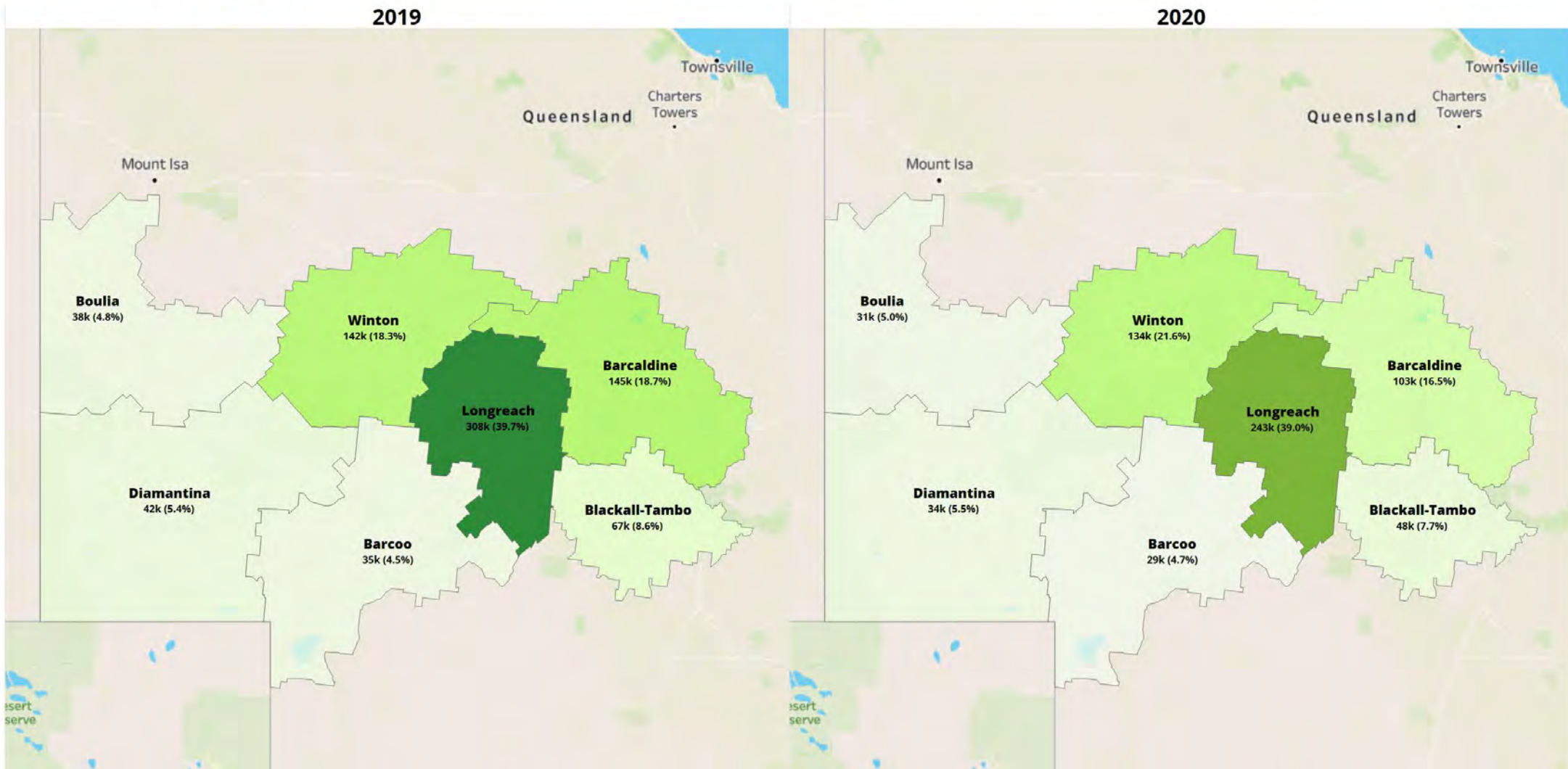
Employment by Sector, including Tourism (2019)



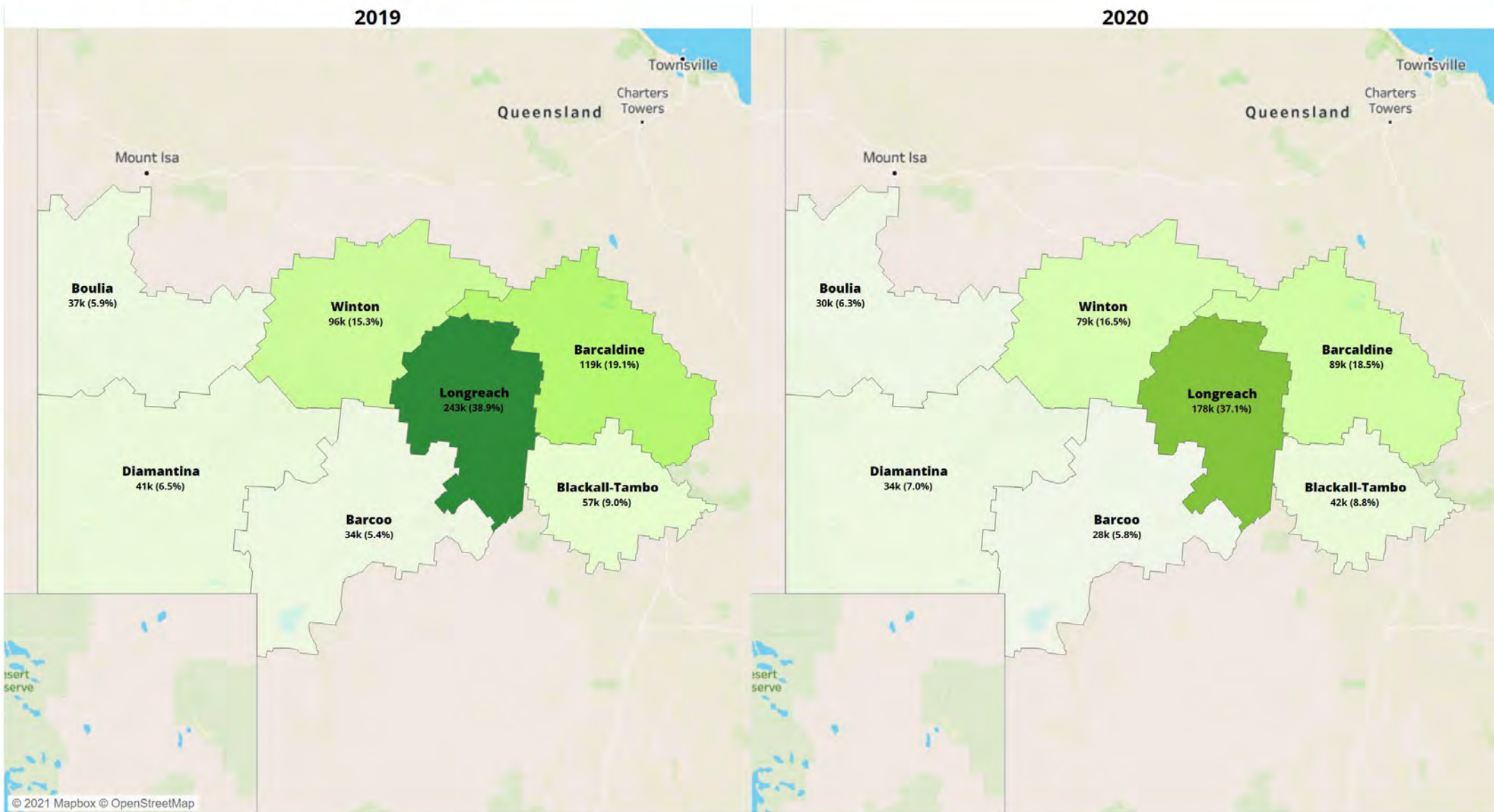
Overview

In addition to the dashboards created for each LGA, a variety of heat maps and charts have also been created to allow for comparison within the CWQ region.

All Visitation to CWQ LGAs



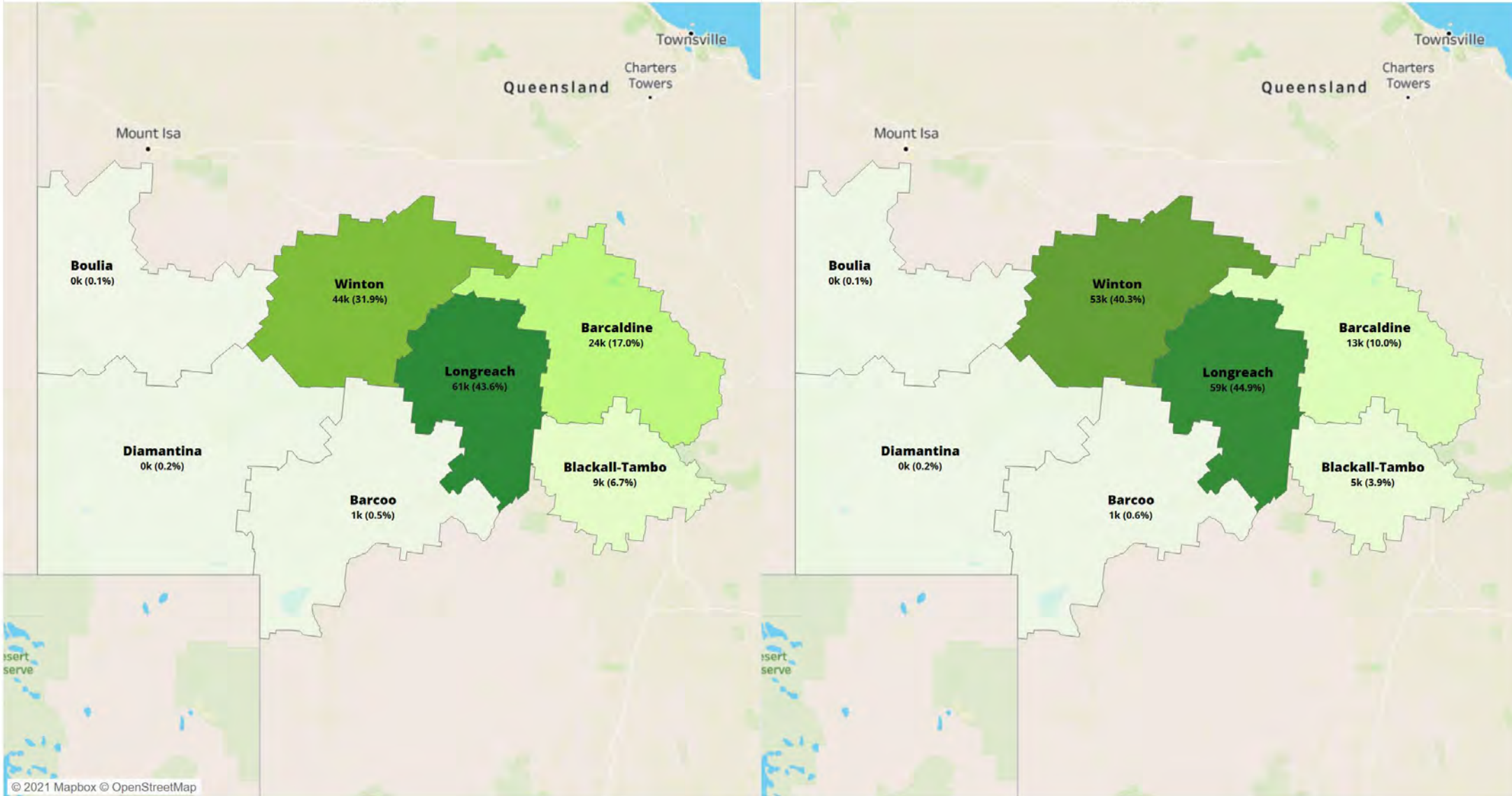
Domestic Overnight Visitation to CWQ LGAs



Domestic Day Visitation to CWQ LGAs

2019

2020

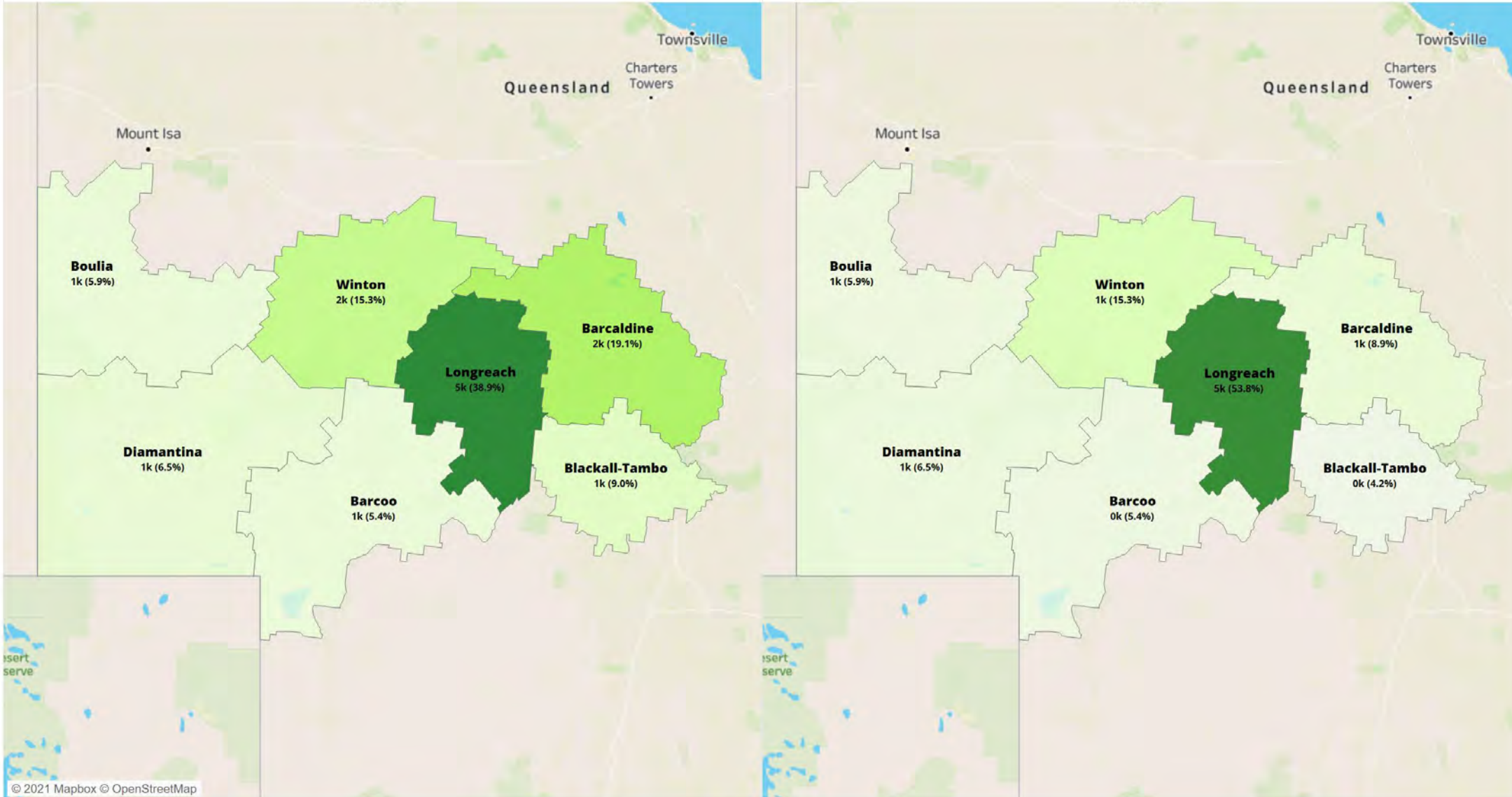


© 2021 Mapbox © OpenStreetMap

International Visitation to CWQ LGAs

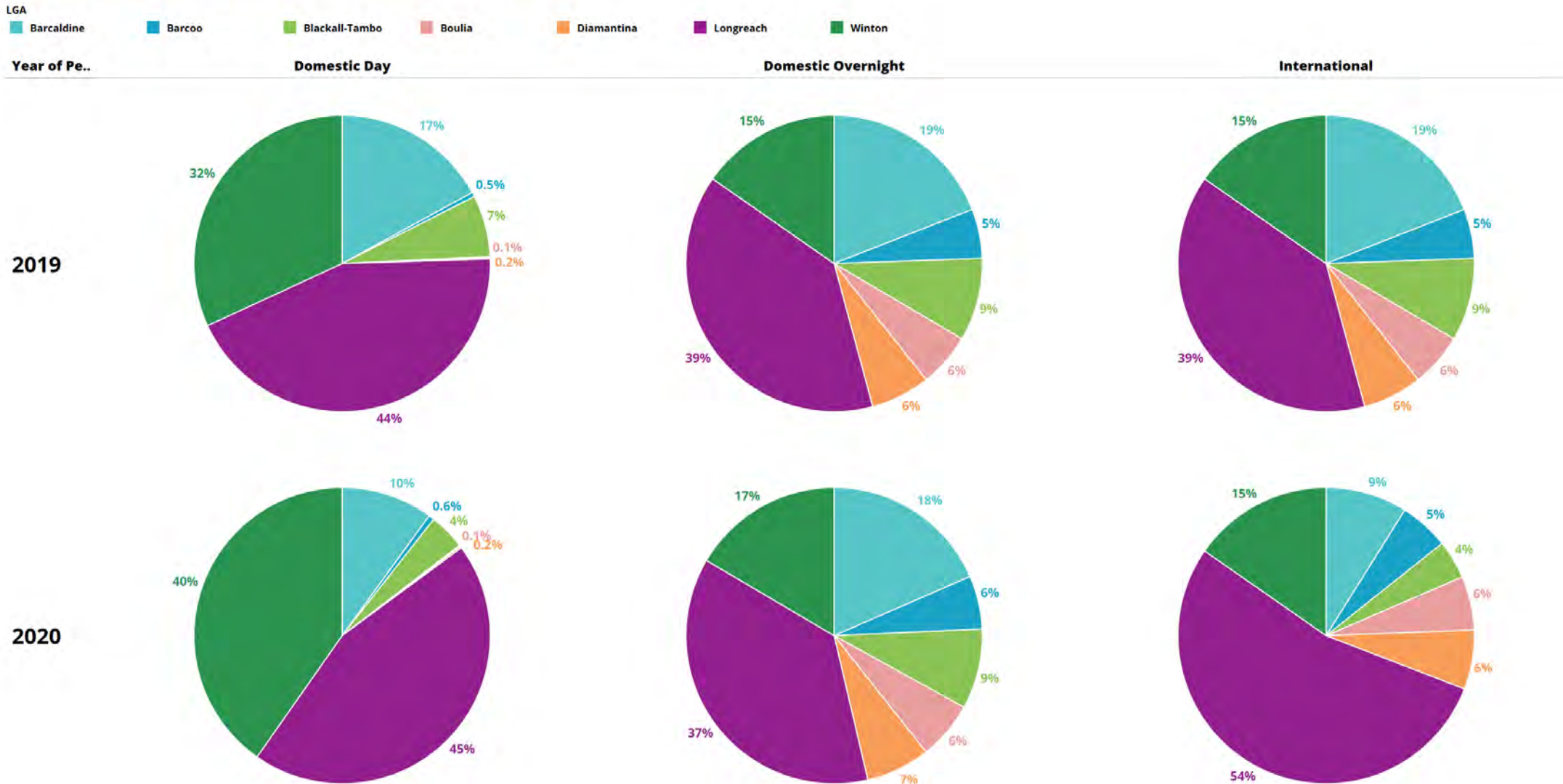
2019

2020

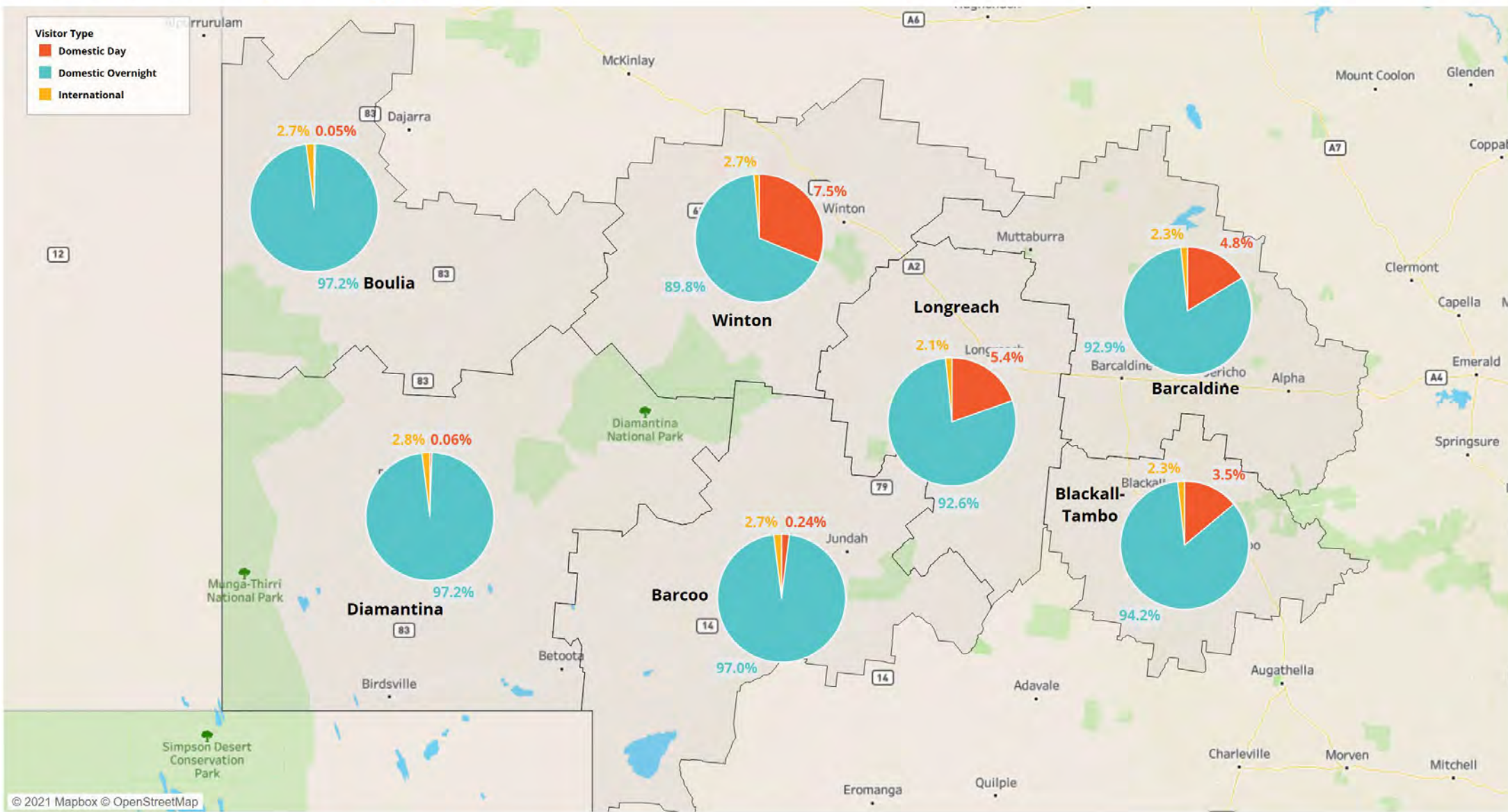


© 2021 Mapbox © OpenStreetMap

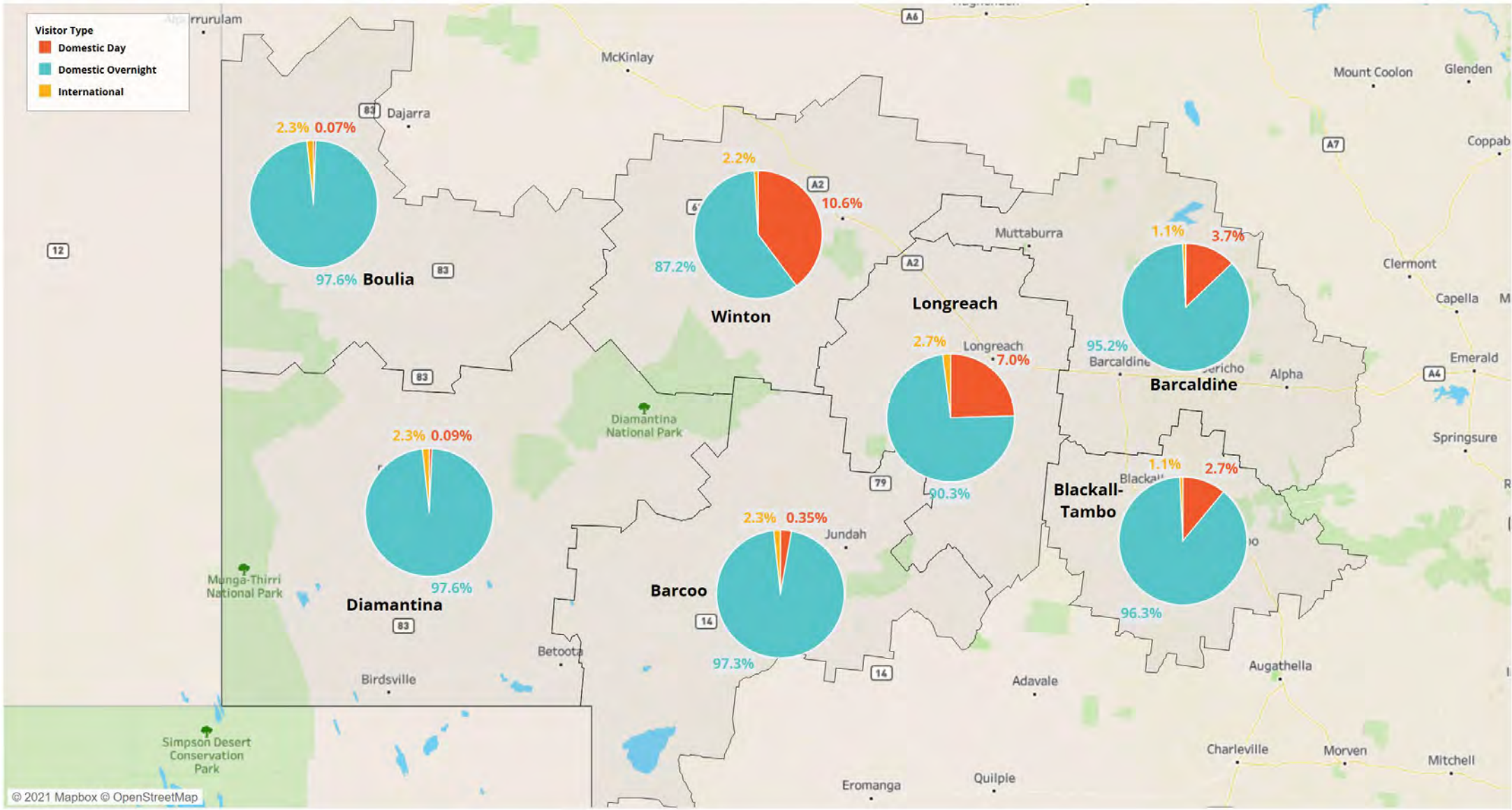
Total Visitation to CWQ LGAs by Visitor Type Share



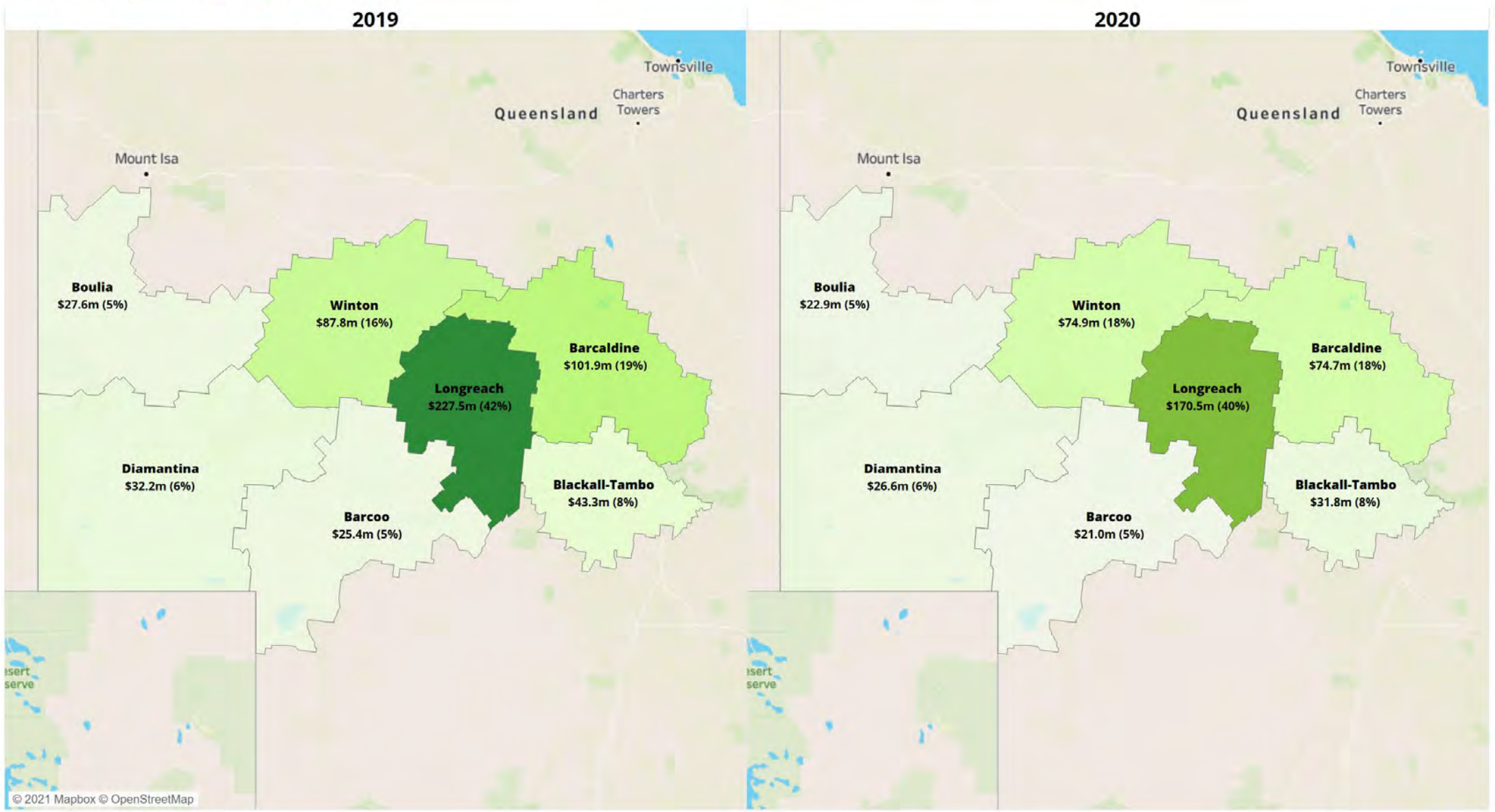
Visitation to each LGA by Visitor Type (2019)



Visitation to each LGA by Visitor Type (2020)

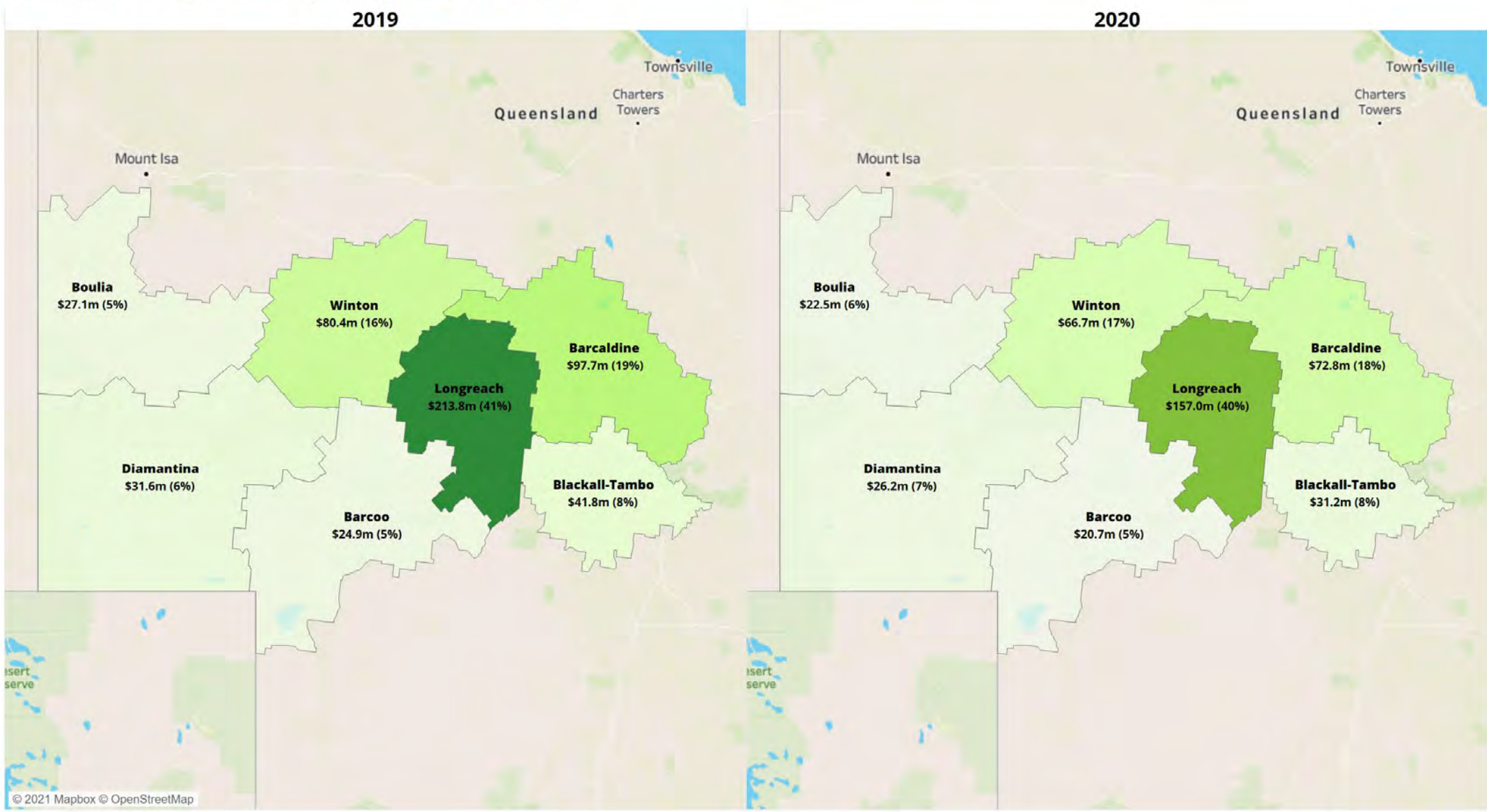


All Visitor Spend by LGA (2019 & 2020)



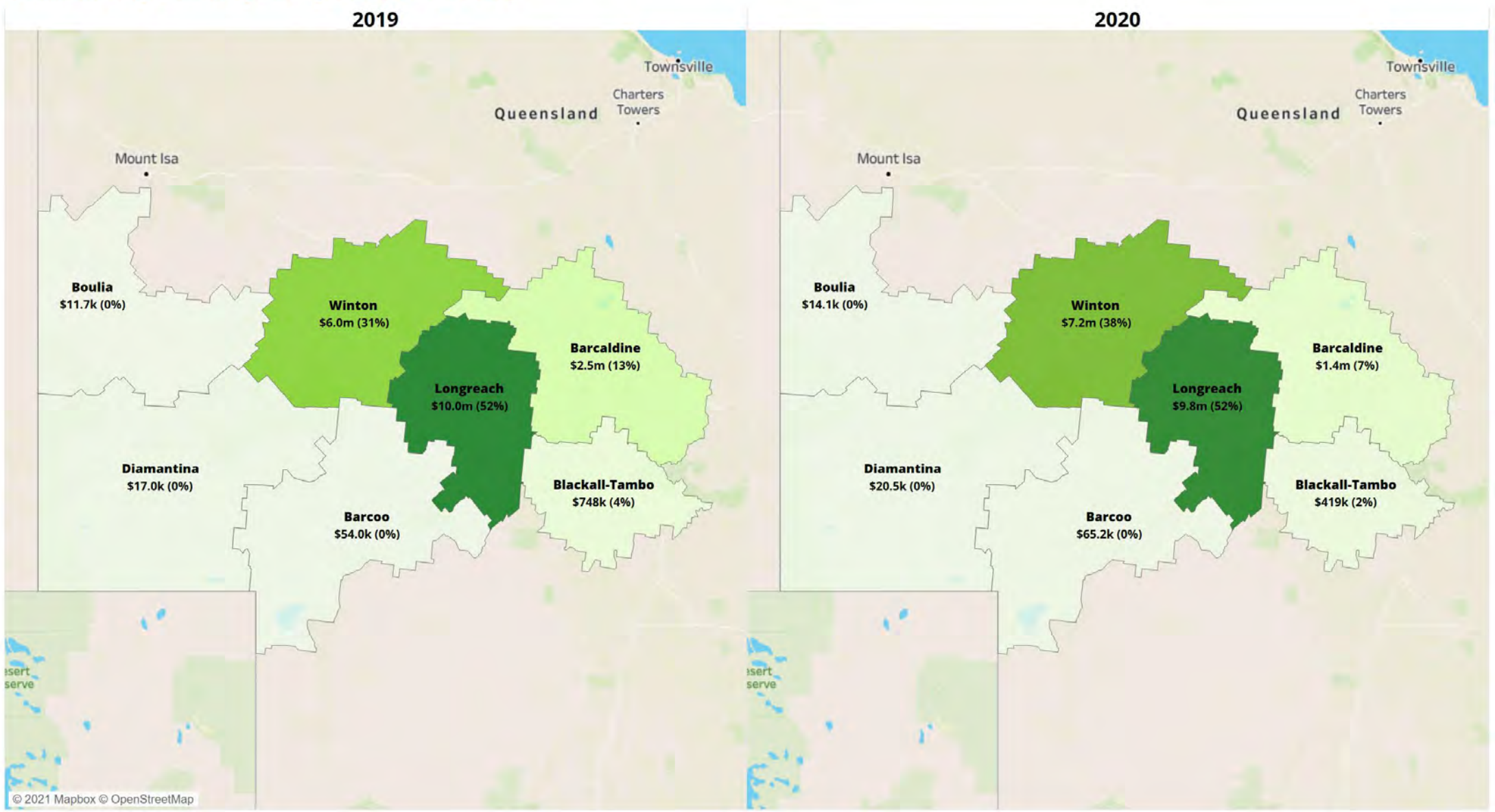
© 2021 Mapbox © OpenStreetMap

Domestic Overnight Visitor Spend by LGA (2019 & 2020)



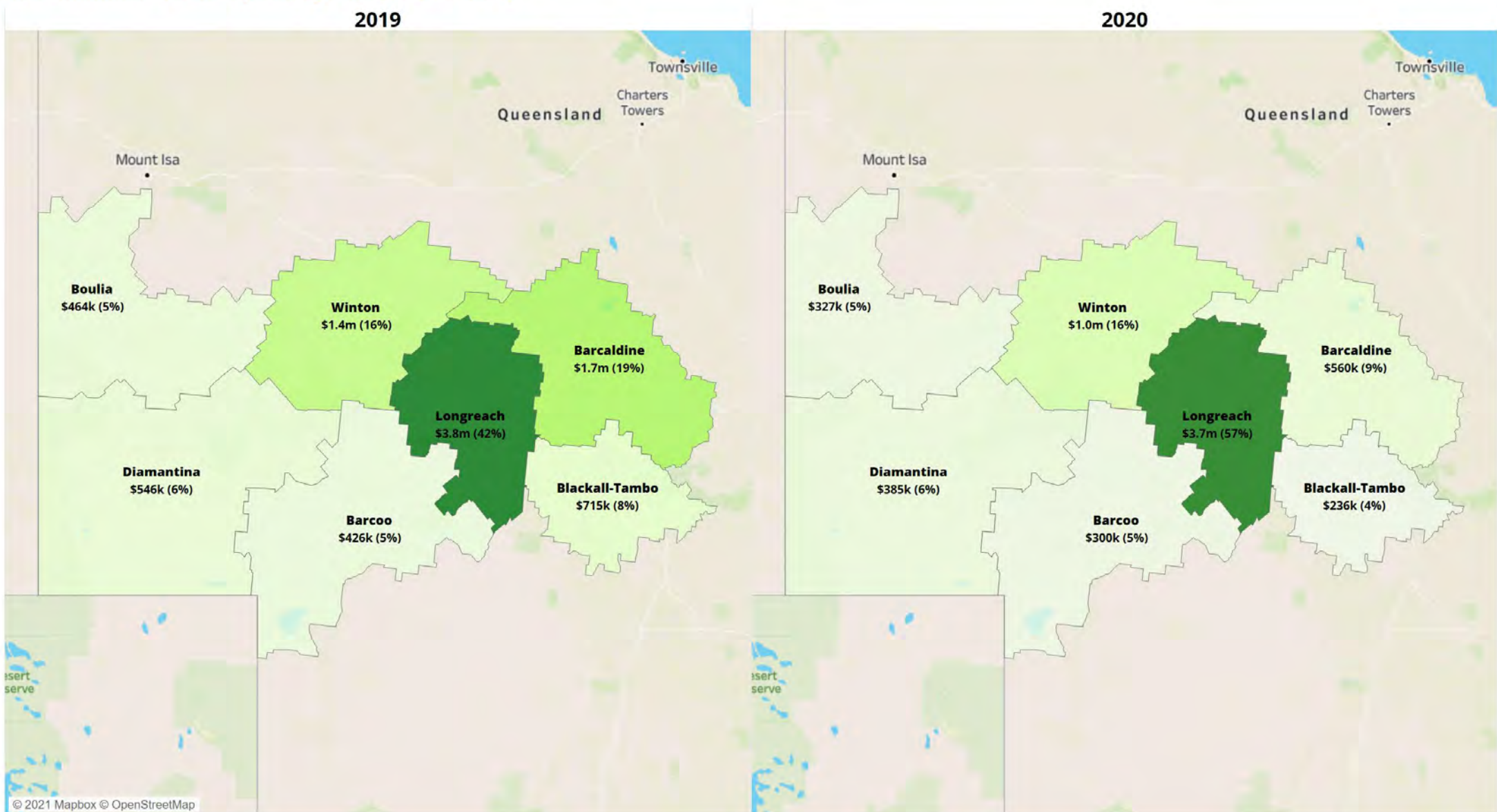
© 2021 Mapbox © OpenStreetMap

Domestic Day Visitor Spend by LGA (2019 & 2020)

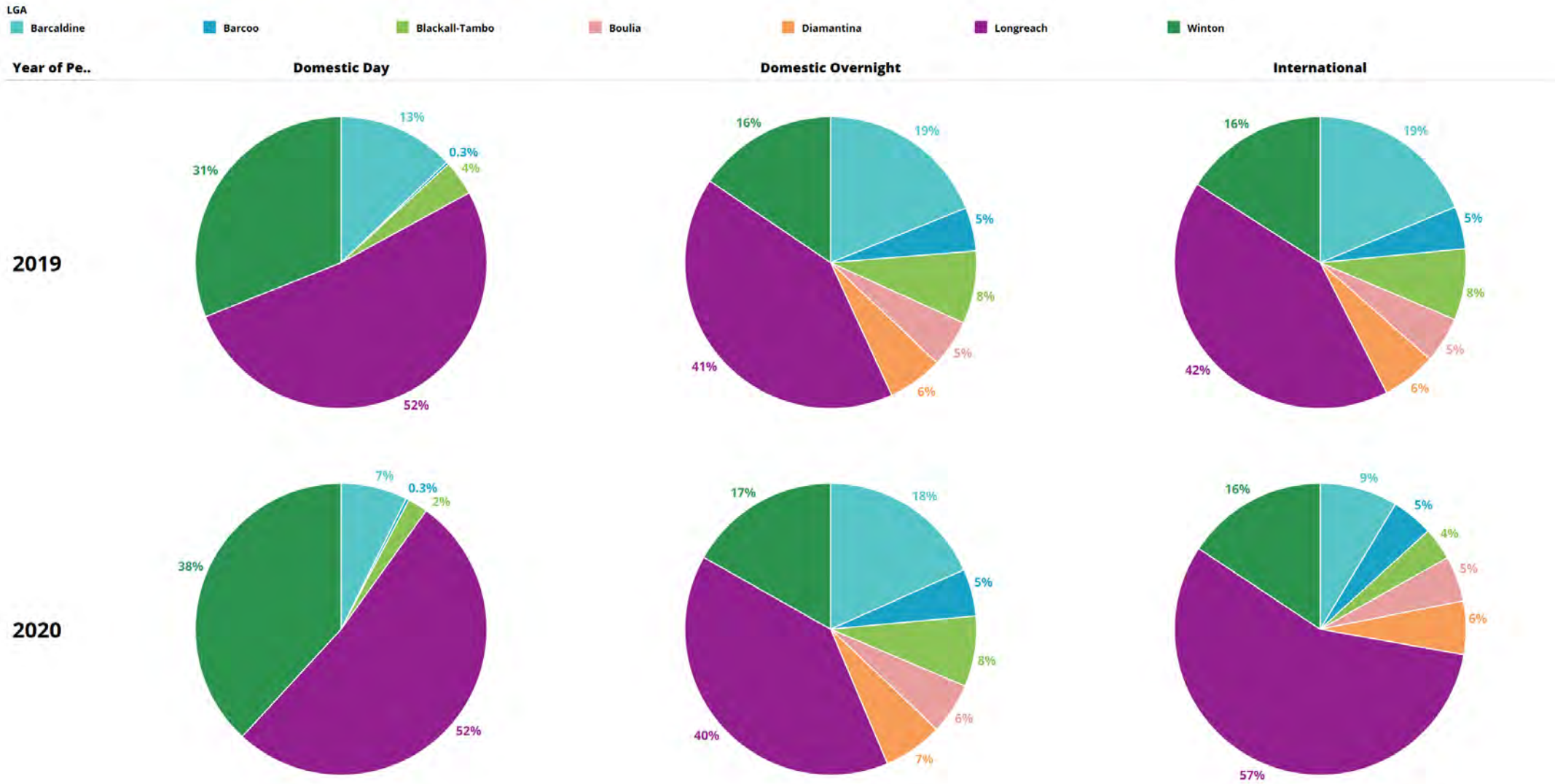


© 2021 Mapbox © OpenStreetMap

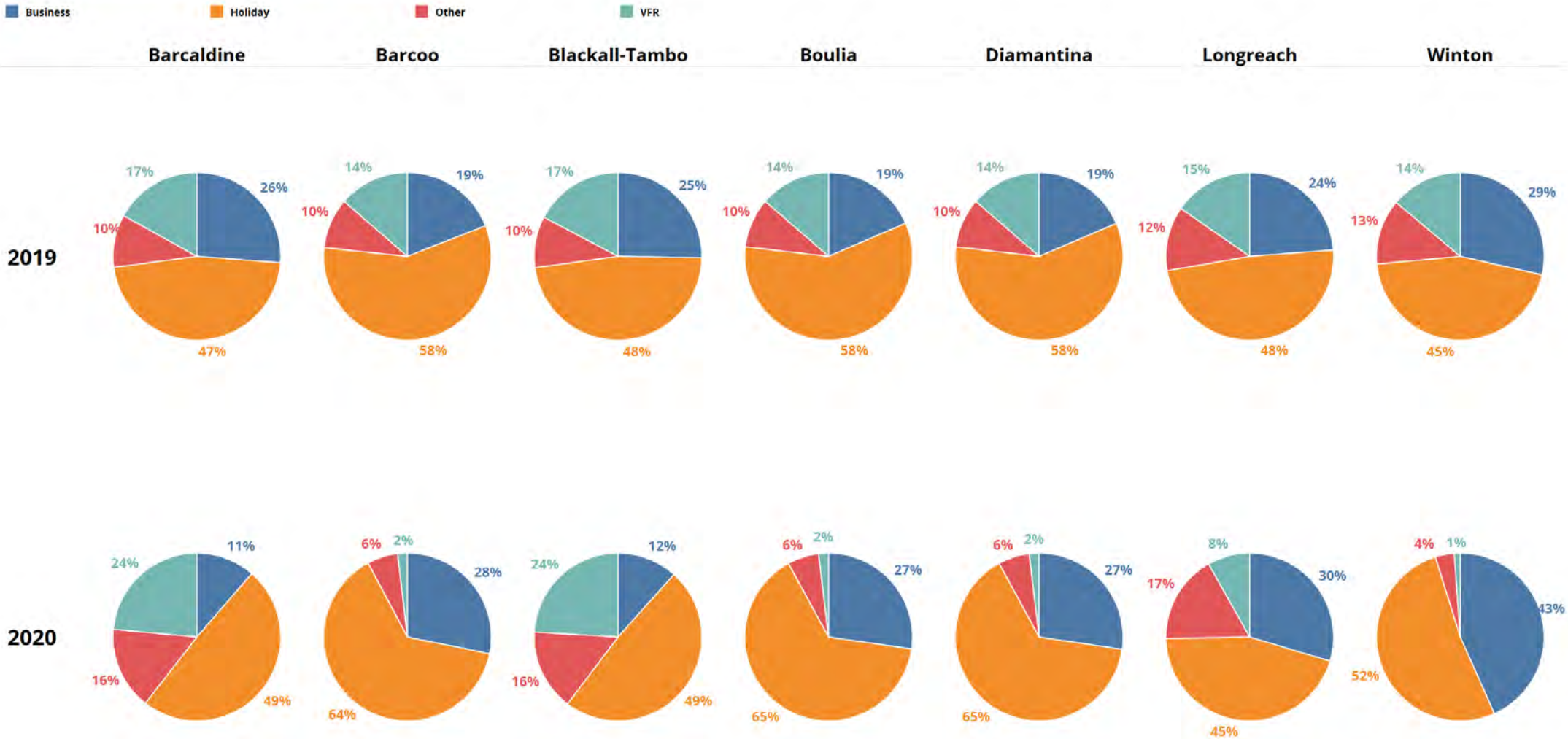
International Visitor Spend by LGA (2019 & 2020)



Total Visitor Spend to CWQ LGAs by Visitor Type Share



All Visitation by Motivation by LGA





PRODUCT AUDIT

About the audit

The following sections provide a tourism product audit for the CWQ region. This includes an assessment of accommodation and attractions within each LGA. The purpose is to ascertain where tourism product is spatially clustered and to identify where product gaps may exist in the tourism product mix.

How the audit was developed

The audit is primarily based on the Australian Tourism Data Warehouse's (ATDW) product database and supplemented with an extensive desktop research exercise from brochures and information collected in VICs throughout the region as well as a review of tourism review websites.

It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online.

The audit has revealed that there is a need to work with operators, particularly micro-smaller operators to ensure they are aware of the need and many benefits of being listed on the ATDW. Many currently are not. The ATDW's ultimate function is to support Australian tourism operators with digital marketing to help extend their exposure and attract more business online. **Through a single listing, an operator's details will then appear on Australia.com and over 50 other websites such as about-australia.com.au and planbooktravel.com.au.**



Accommodation & Attractions

The accommodation dashboard displays:

- a breakdown of the number of accommodation properties, the number of rooms and the number of caravan/camping sites in each LGA; and
- a breakdown, based on the accommodation type category, of the number of properties, rooms and sites available throughout the CWQ region.

The Dashboards are able to be manipulated with filters pertaining to the LGA or the type of accommodation.

The attractions/product dashboard displays:

- a summary of the number of tourism products available in each LGA; and
- a breakdown of the products available in each LGA.

A note on destination events

Destination events differ from community events because of the types of patrons they attract: destination events attract a larger proportion of visitors from outside the region in which they are held.

Tourism and Events Queensland release a Queensland Events Calendar (<https://www.queensland.com/en-au/events>) which summarises the major destination events held in each region each year.

The calendar lists the following destination events which are situated within the CWQ region:

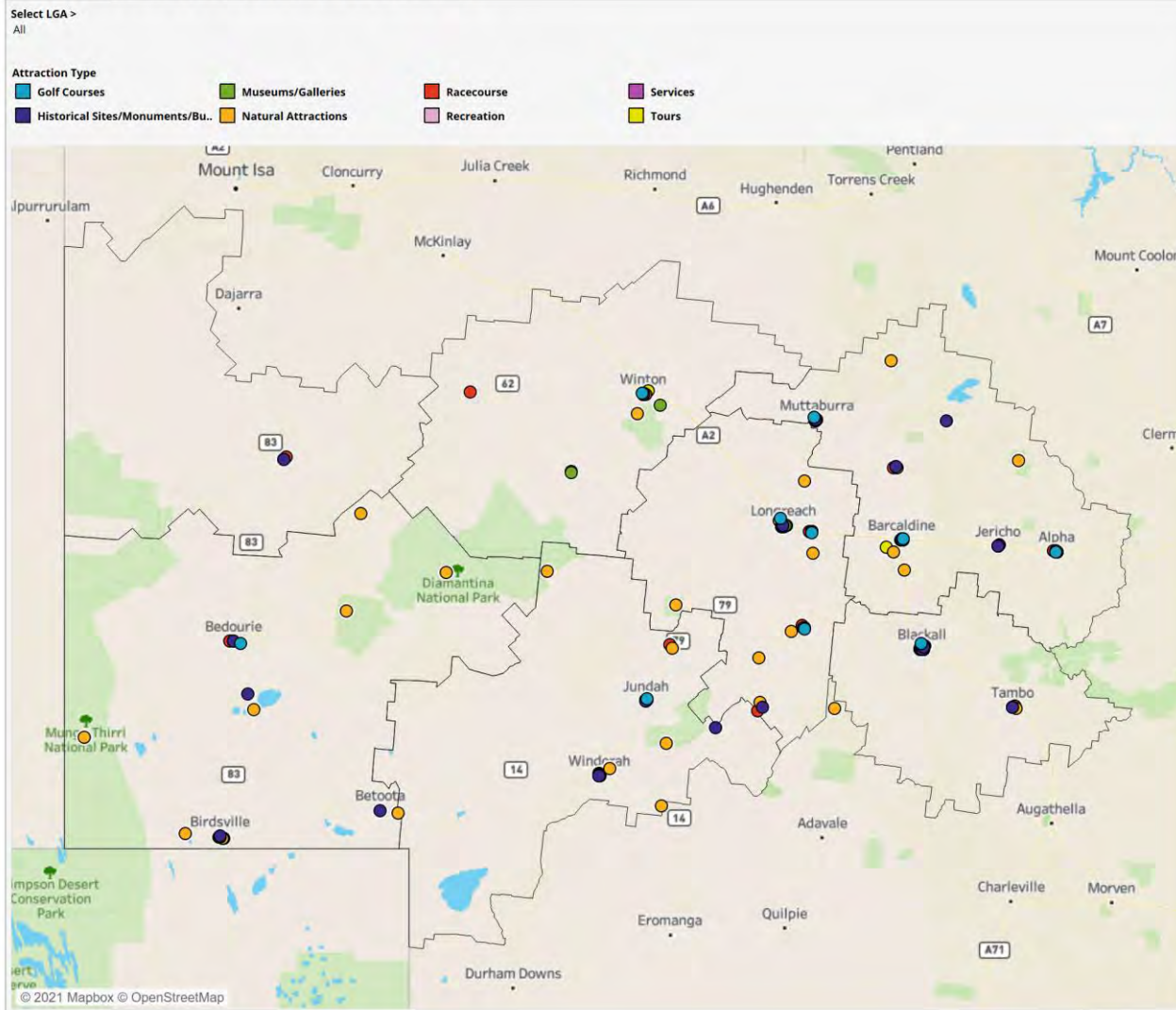
- Vision Splendid Outback Film Festival;
- Birdsville Big Red Bash; and
- Birdsville Races.

Based on in-region consultation, the following events were also identified as being potential destination events: The Outback Food, Wine and Music Festival; Boulia Camel Races; Winton Outback Festival; and Better In Blackall Festival.

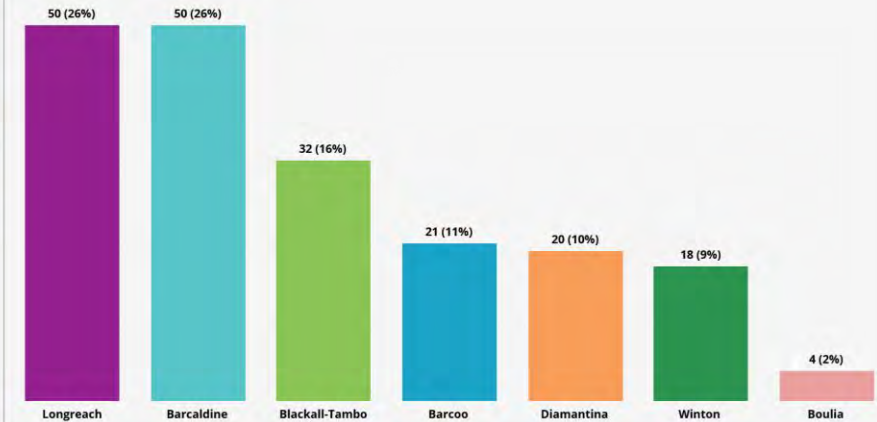


Attractions/Services Audit by Type

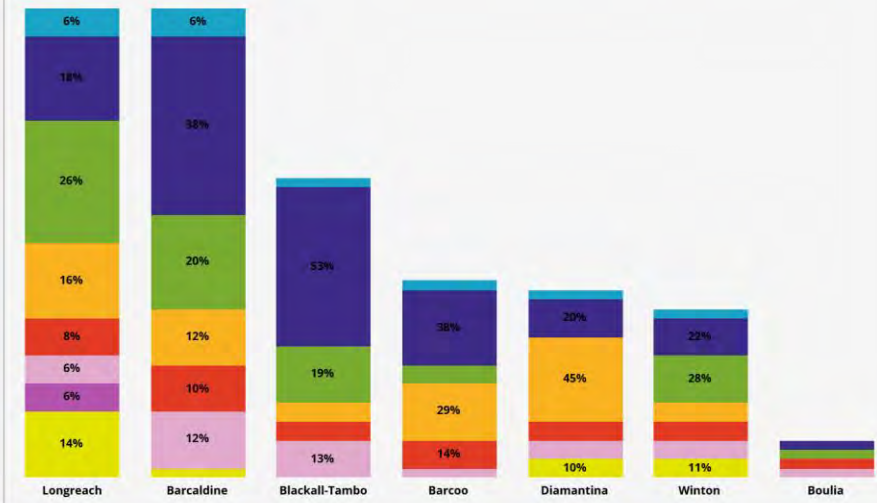
Attraction Audit Dashboard



Attractions by LGA, All LGAs

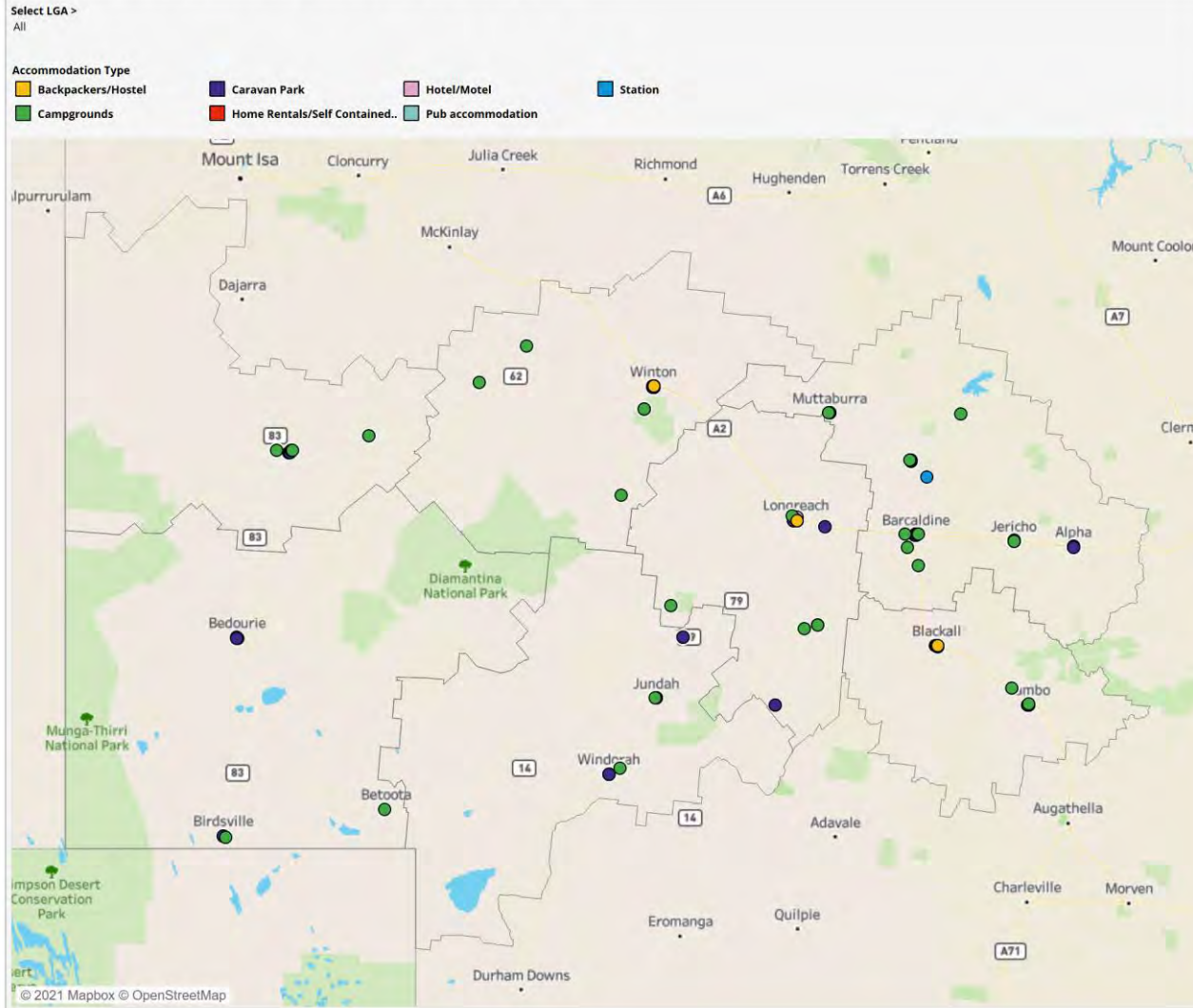


Attractions by LGA & Type, All LGAs

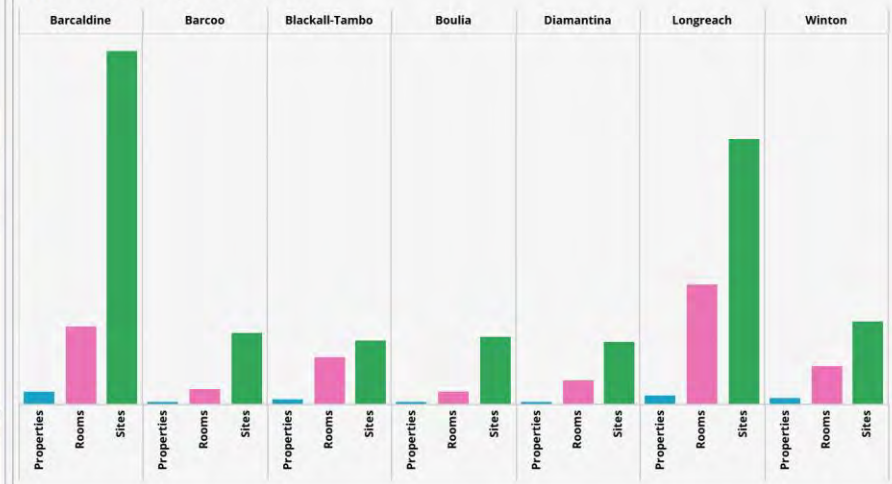


Accommodation Audit by Type

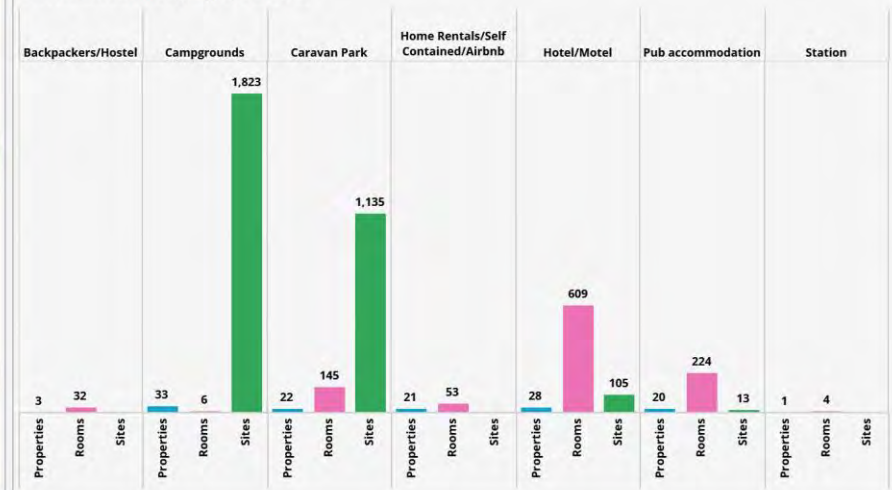
Accommodation Audit Dashboard



Accommodation by LGA, All LGAs



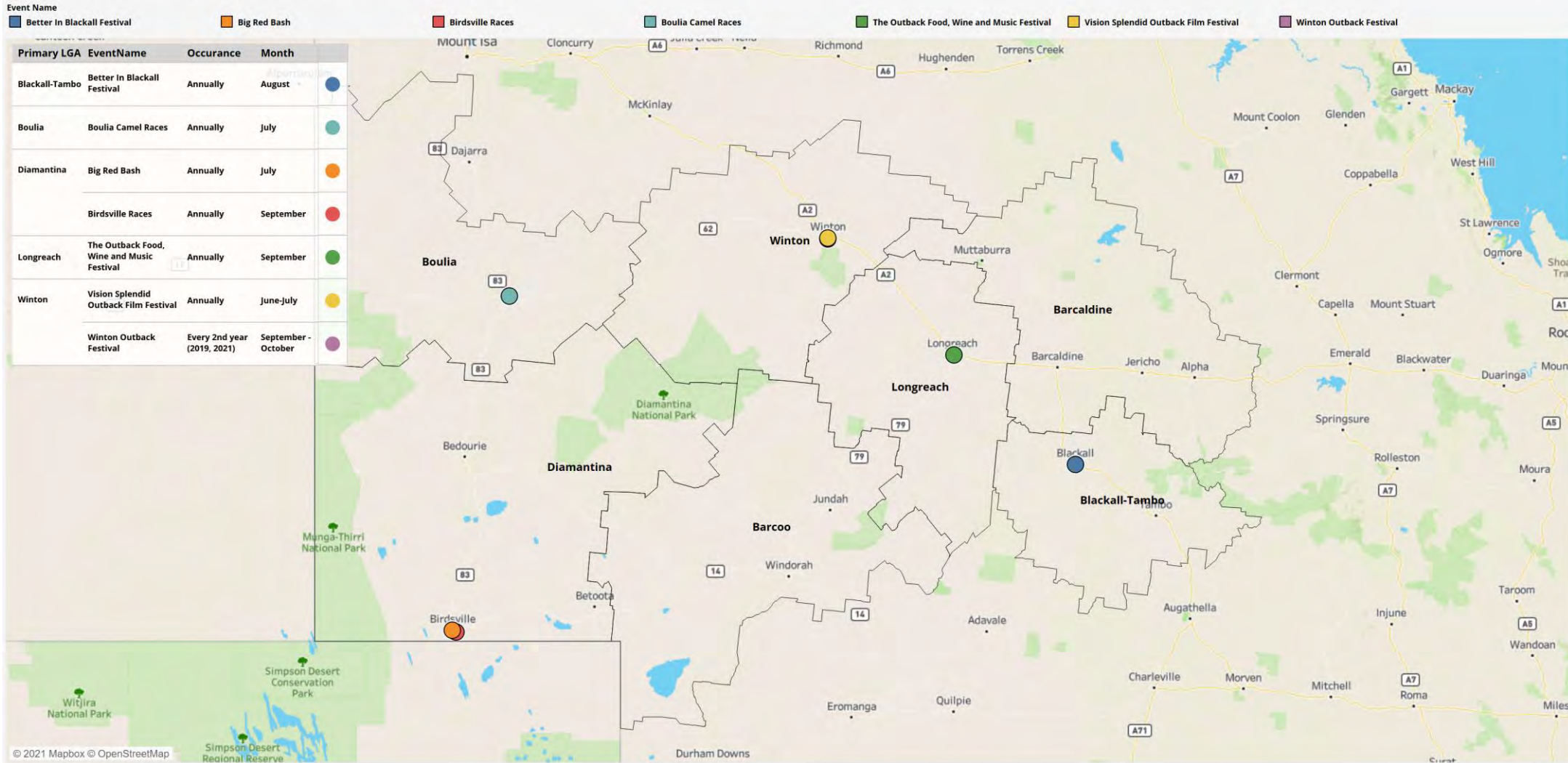
Accommodation by Type, All LGAs



Event Audit by LGA

Destination Event Audit

Note, this audit is only focused on destination events. It excludes community and civic-based events.



One of the major challenges for visitors with respect to tourism product Australia-wide is obtaining a realistic assessment of the true quality of product. Many of the ratings supplied and being advertised are self-regulated and do not always align with consumer expectations and what is available internationally. As a result, many consumers turn to product review websites such as TripAdvisor to see what other visitors rate product as. This is particularly the case for accommodation product.

As part of this project, the project team completed a top-line quality assessment of accommodation product within the CWQ region.

It is important to note that the ratings applied have been based on a desktop review only and has not involved in-person visits to properties (as this was out of the scope of the exercise). The desktop review, however, has incorporated online reviews of properties as well as research through imagery and the project team's experience within the sector.

Because of the sensitivity of the quality assessment, the project team considers that the actual results not be provided within this report, but, the following observations are offered.

- There is limited supply of commercial accommodation product throughout the CWQ region. As a result, during peak seasons, properties are achieving close-to-full occupancy rates and rates charged are high (when comparing the quality/style of product offered to that in other destinations). Because of this, there is quite a lot of online feedback relating to the need to update product to better align with prices being charged.
- Some of the photos offered for accommodation product does not truly reflect what is on offer. This results in a misalignment of consumer expectation and what is provided.

- There is very limited "higher-end" accommodation product on offer in the CWQ region, with only two properties achieving what the project team considers as internationally comparative 4-star ratings.
- There are no branded properties available in the CWQ region. A branded property is more likely to attract a market (particularly international visitors) who are more comfortable in using branded properties because of the standard they offer in facilities and service. It is understandable, however, that there is not yet a branded property within the CWQ region because of seasonality, higher development costs and challenges in attracting and retaining skilled staff etc. However, it would make the region easier to market if there was a branded property because these larger companies bring with them significant marketing budgets along with the transfer of staff. To attract a fly-drive market, for example, there is a need to have branded accommodation product to support this type of market wanting to stay in commercial accommodation, and spend a bit more.
- There are also no branded holiday parks (e.g. BIG4, Discovery Parks, Top Parks etc.) available in the region either despite the large number of caravan parks available and freedom camping that takes place. With the region attracting a larger number of families (based on anecdotal feedback from industry) there may be an opportunity to investigate attracting one of these players.
- If new product and attractions are going to be encouraged within the region, there is a corresponding need to ensure that accommodation facilities are able to match. This does make it more challenging for many of the LGAs in the CWQ region with seasonality especially, making it more difficult to support the level of investment required for both enhancing and upgrading existing accommodation, as well as introducing new accommodation facilities.



Accommodation

The following figure demonstrates that while the CWQ has a number of accommodation options within the basic 1-star – mid-range 3-star properties, there is a limited number of higher quality properties, particularly those of a larger scale and/or branded nature.

Opportunities exist to consider encouraging :

- higher-quality, boutique eco-chalets and/or glamping which could be operated on a seasonal basis and to supplement existing accommodation sites;
- a higher-quality branded, destination holiday park to encourage further growth in the family market and higher visitor spend; and
- a medium-size, higher quality hotel or motel property which could potentially be branded to help attract a fly-drive market.

Whilst seasonality is well recognised as a challenge to attracting new investment, it was noted that the traditional holiday season is growing, with earlier start dates in late March and extending longer into late October and even early November. Over time, these shoulder periods may continue to strengthen till eventually, the low season is a three month period (December – February).

Whilst much spare market demand is soaked up by freedom camping sites which the LGAs all offer, the economic benefit from most freedom campers is far lower than from commercial accommodation facilities offered.

And local evidence suggests that many freedom campers are also looking for motel/hotel and related commercial accommodation options for nights where they want to use a proper bathroom, bedroom etc. and break the routine of staying in the motorhome, caravan or tent.

KEY

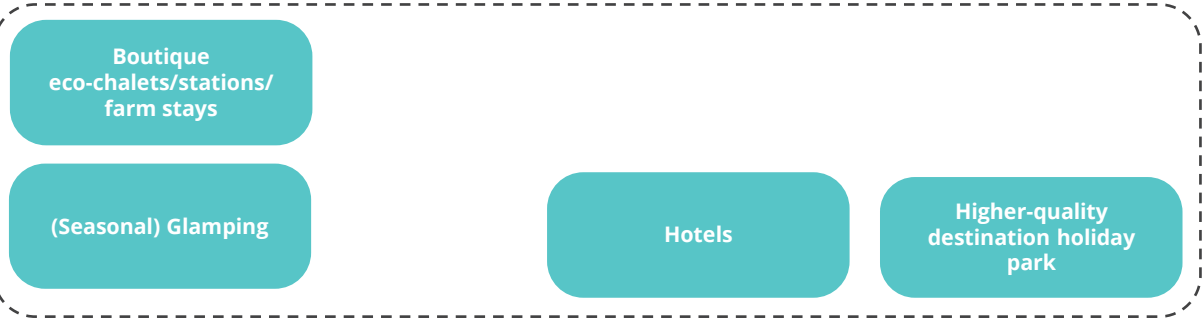


Current Stock



Opportunity gap to be filled

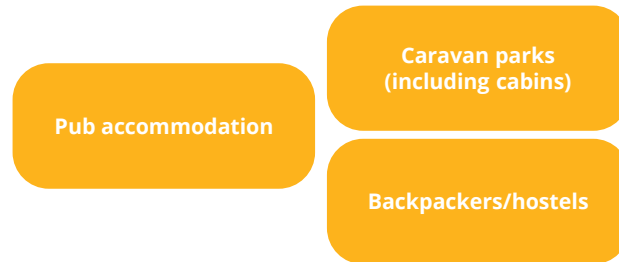
Luxury 5-star



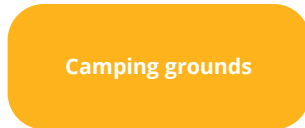
Mid-range 3-star



Basic-mid 2-star



Basic 1-2-star



Boutique

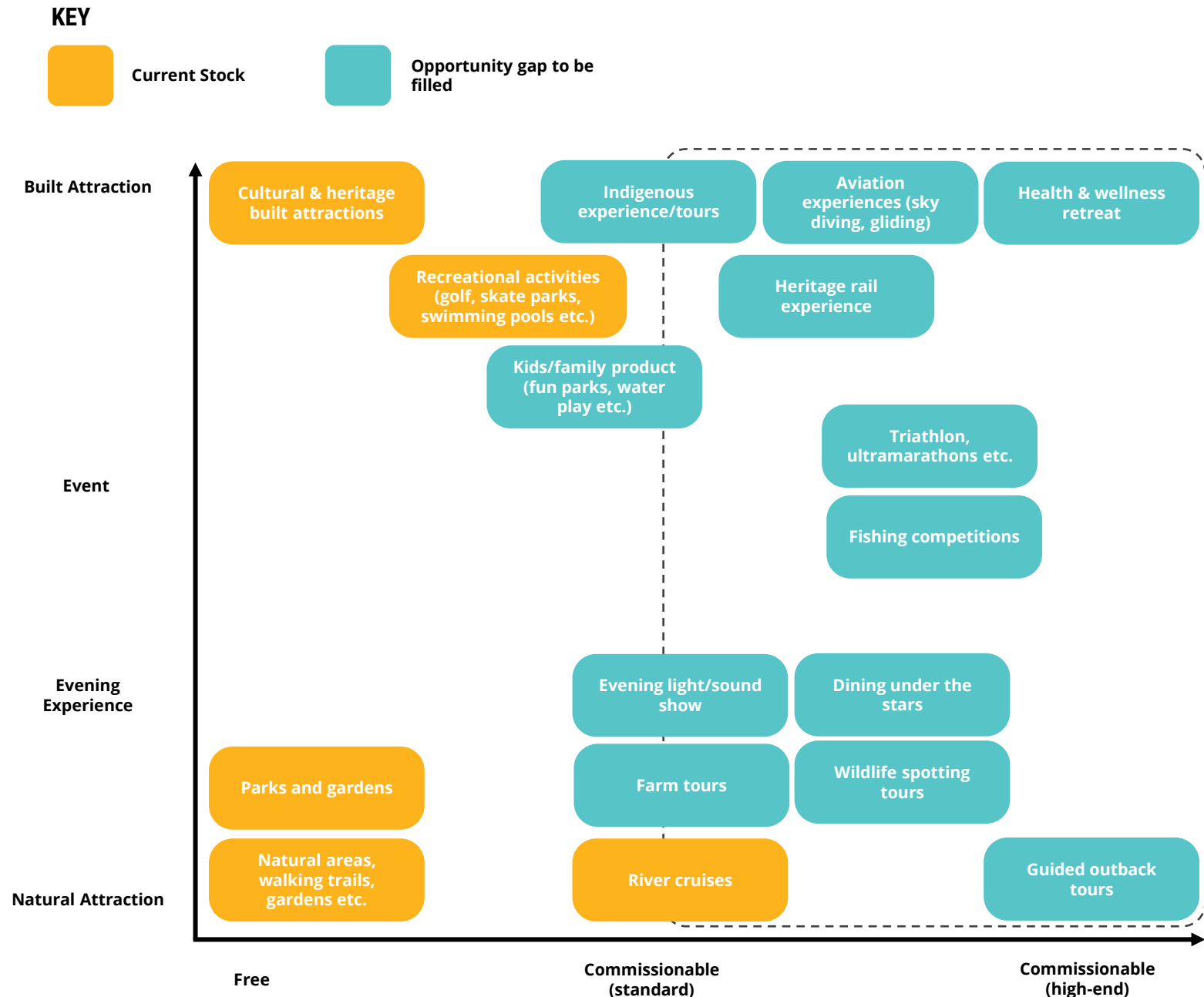
Mid-size

Large-size

Attractions

The following figure provides a gap assessment of the attractions/experiences sector in the CWQ. It demonstrates that:

- the region is fortunate to have a variety of larger-scale, high-quality, all-weather, built attractions including (but not limited to) Qantas Founders Museum, Australian Stockman's Hall of Fame & Outback Heritage Centre, Australian Age of Dinosaurs and the Waltzing Matilda Centre;
- there is a large amount of free and self-guided product (including trails) focused on the region's natural and cultural assets;
- there are few attractions which are focused primarily on families and children such as fun parks;
- there are limited evening-based experiences to encourage a longer length of visitor stay and to provide experiences which locals can enjoy rather than having to travel out of the region to undertake evening-based activities;
- there is limited active (as opposed to passive) eco and adventure tourism product, despite a significant proportion of the region being natural areas;
- Repeat visitors are always looking for the new attraction or refreshed and expanded current attraction to visit.; and
- Outback, regional and more remote areas are often a haven for wildlife spotting, whether they be birds, reptiles or mammals, though limited viewing experiences would appear to exist in most LGAs.





MOVING FORWARD

While the tourism data collection exercise has been extensive and many gaps have been filled and challenges resolved, there still remain some gaps to be filled and data to be verified.

Freedom camping

One of the unique characteristics of the CWQ (and broader Outback Queensland) region is the number of freedom campers who stay, particularly during the peak tourism period.

While every effort has been made to provide an accurate estimate of the number of freedom campers staying in each LGA through in depth consultation, there is a need for all Councils, on an ongoing basis, to collect data on the level of freedom camping occurring in their LGA.

An annual survey, completed during the peak tourism season, should be undertaken by each Council and submitted to the data coordinator/contractor. This will allow a more robust representation of freedom camping to be incorporated into the modelling. The suggested survey has been included as part of the Data Model Pack.

Accommodation survey

Although accommodation occupancy rates are commercially sensitive, all accommodation operators spoken with during this exercise were keen to better understand the visitor market and understood the need to supply occupancy data to achieve this.

There is a need for the data coordinator/contractor to complete an annual survey of accommodation operators to gather an understanding on how visitation may have increased or decreased in any given year going forward. The suggested survey has been included as part of the Data Model Pack.

It is important that all occupancy data is kept confidential and any data released is aggregated on an LGA basis or higher geographical area only to protect commercial sensitivity.

Holistic events database

Although the project team was able to collect some events data from individual event operators, there is a need to have a holistic events database which not only details which events are being held when but also how many visitors are coming and potentially a breakdown of where they are coming from.

This will require the data coordinator/contractor to gather data, assuming a proactive role in contacting event operators prior to and post events to collect data.

Product database

As indicated earlier, while some operators within the CWQ region are ATDW listed, many are not. Now that the CWQ region has a comprehensive product database, there is a need for the data coordinator/contractor to continue to ensure this is updated as new product is added or removed.

This information should also be fed into Outback Tourism's website, and, if possible, TEQ's website. The challenge is that many of these sites display product directly from the ATDW so an ATDW listing may be required.



