

CWQ DATA COLLECTION & ANALYSIS

MARCH 2020

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





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INTRODUCTION & CONTEXT



Introduction

Stafford Strategy (Stafford) was commissioned by the Central Western Queensland Remote Area Planning and Development Board (RAPAD) to undertake the develop a tourism data model for the Central West Queensland (CWQ) region.

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

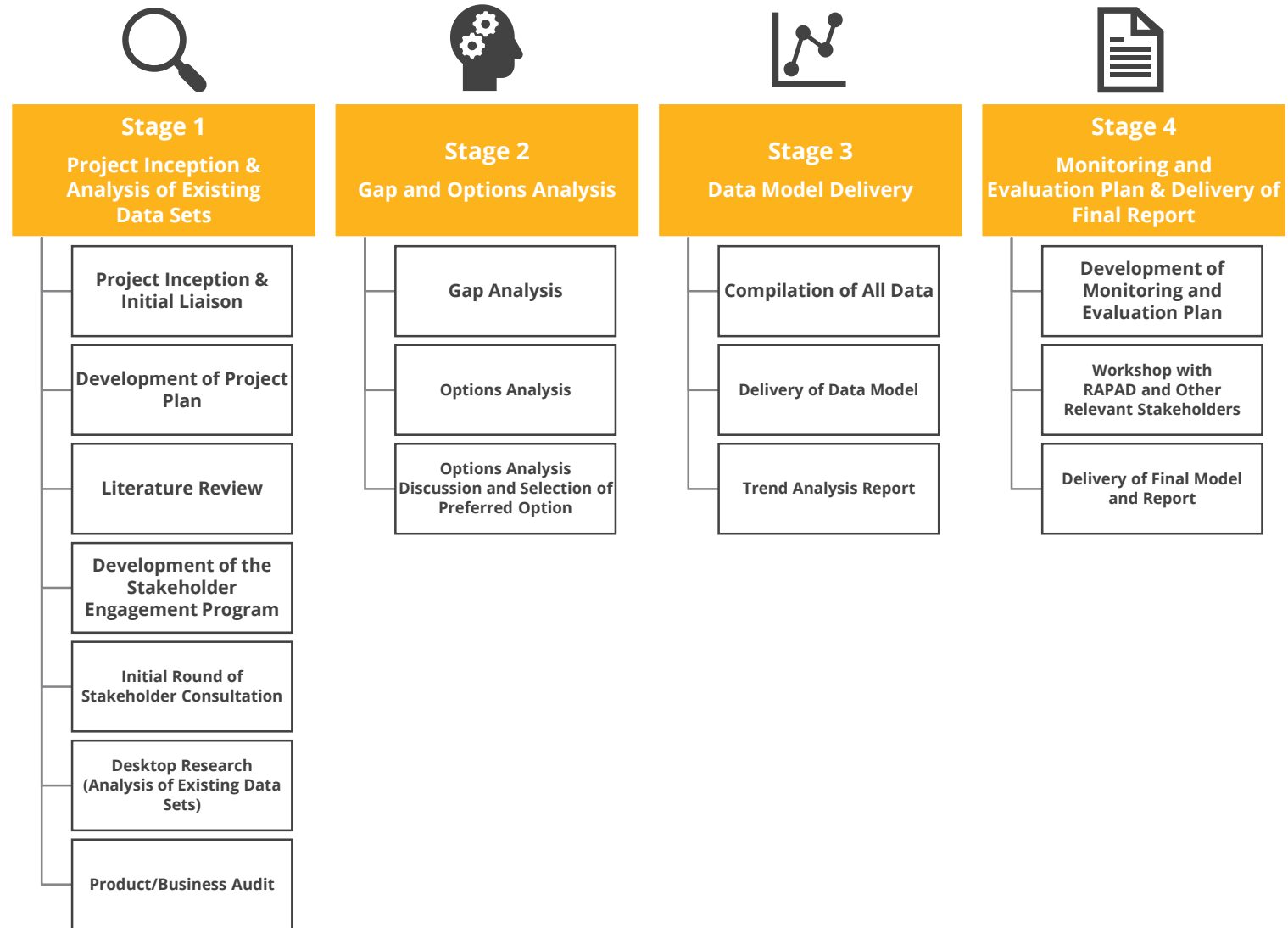
Scope

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.

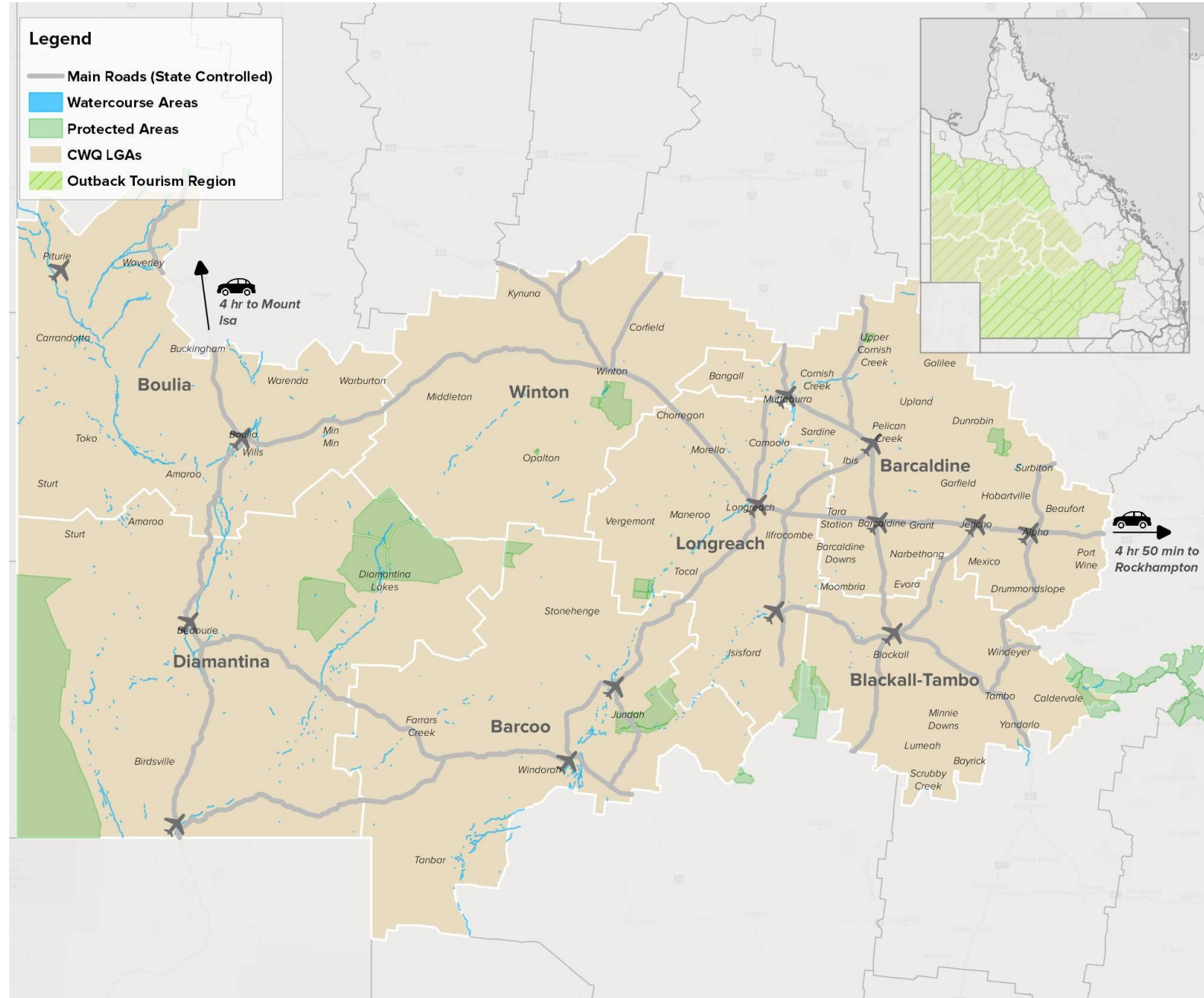
While being a geographically larger area (comprising almost 23% of the land area of Queensland), it is also one of the most sparsely populated and remote regions.

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.

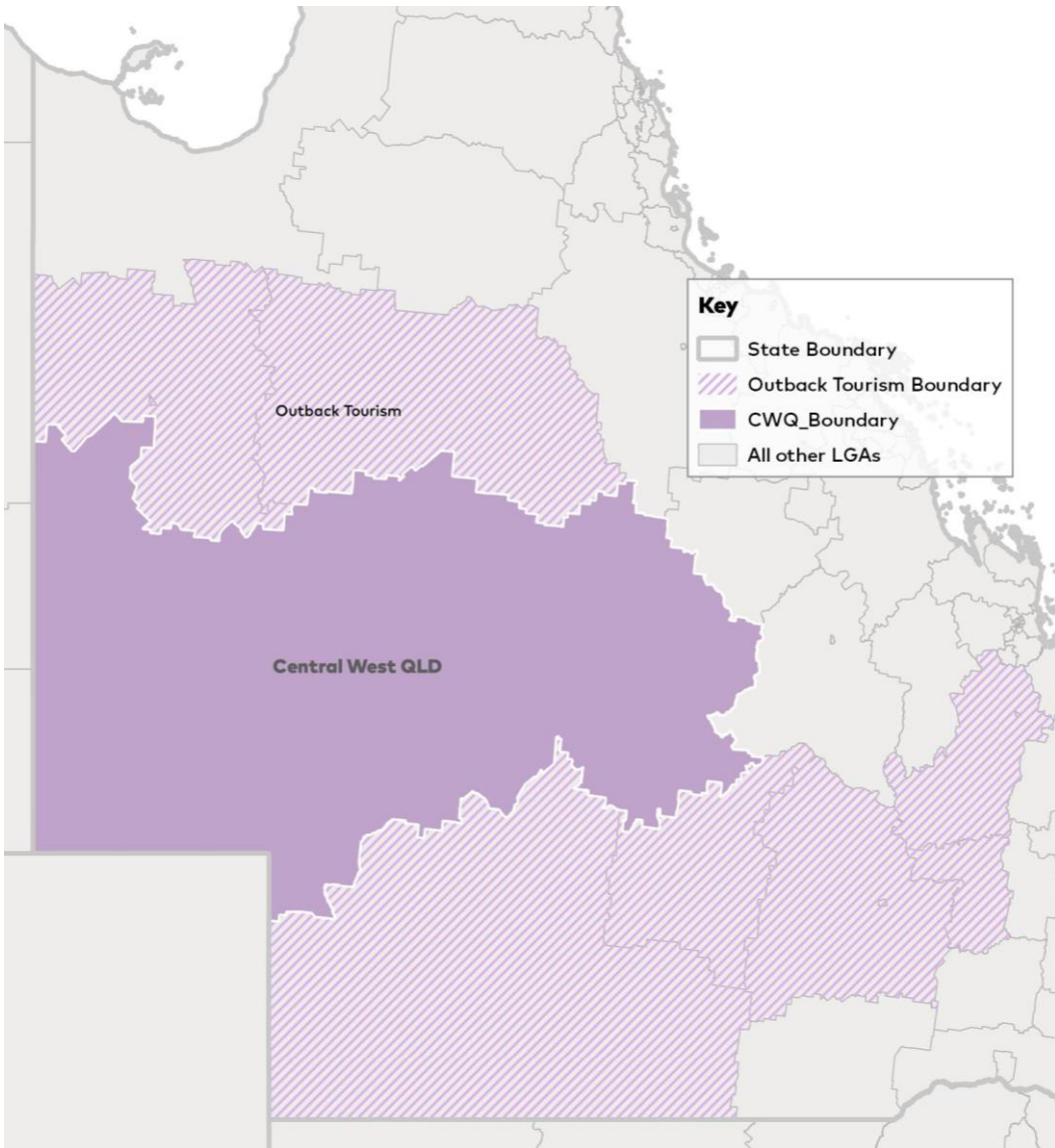
Queensland Rail's Spirit of the Outback also travels through Barcaldine and Longreach, with connecting bus services through to Winton.

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).

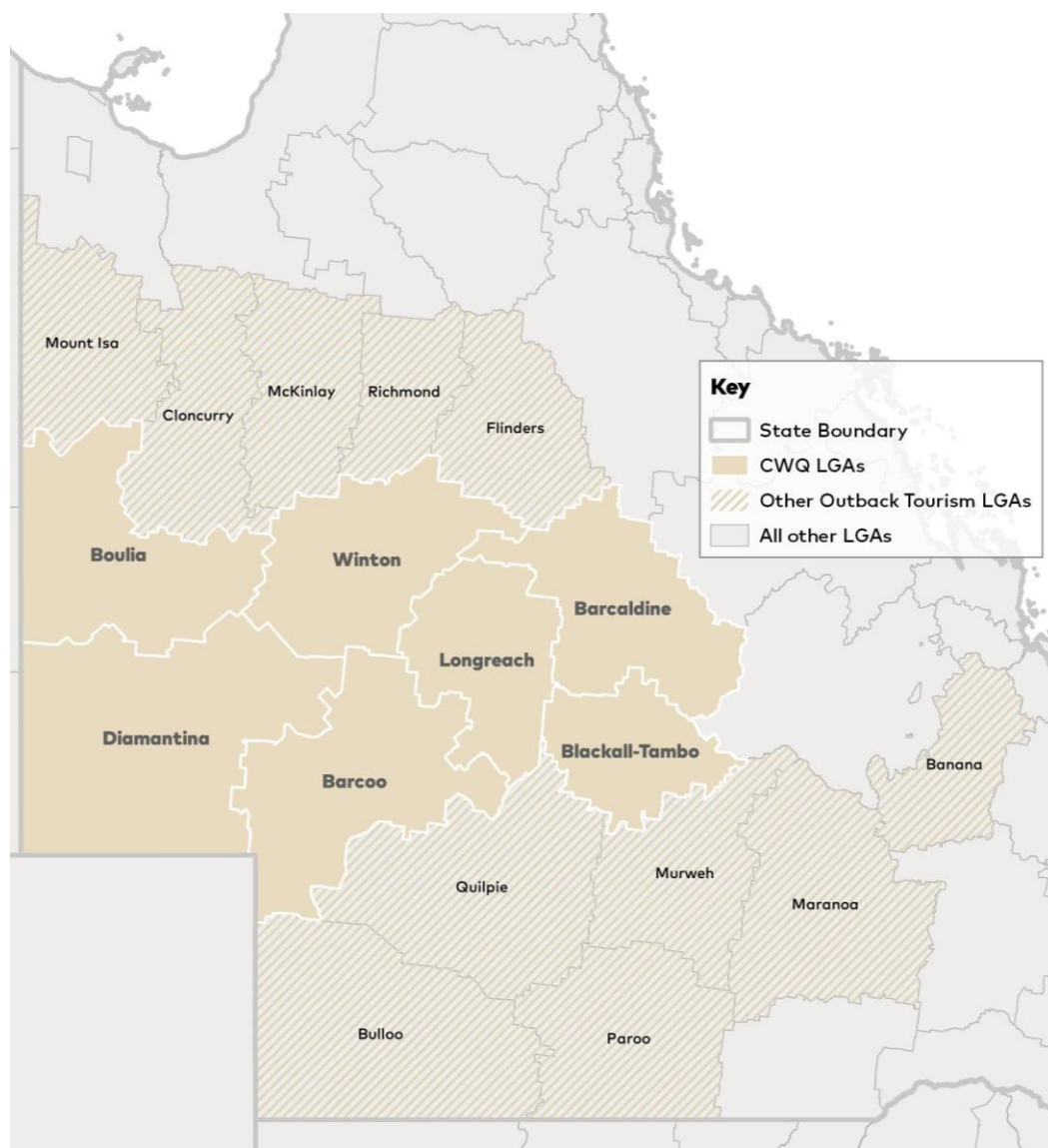
The Outback Queensland region is divided into five sub-regions and CWQ falls within the Far West (Boulia, Barcoo and Diamantina) and Central West (Winton, Longreach, Blackall-Tambo and Barcaldine) sub-regions.



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.

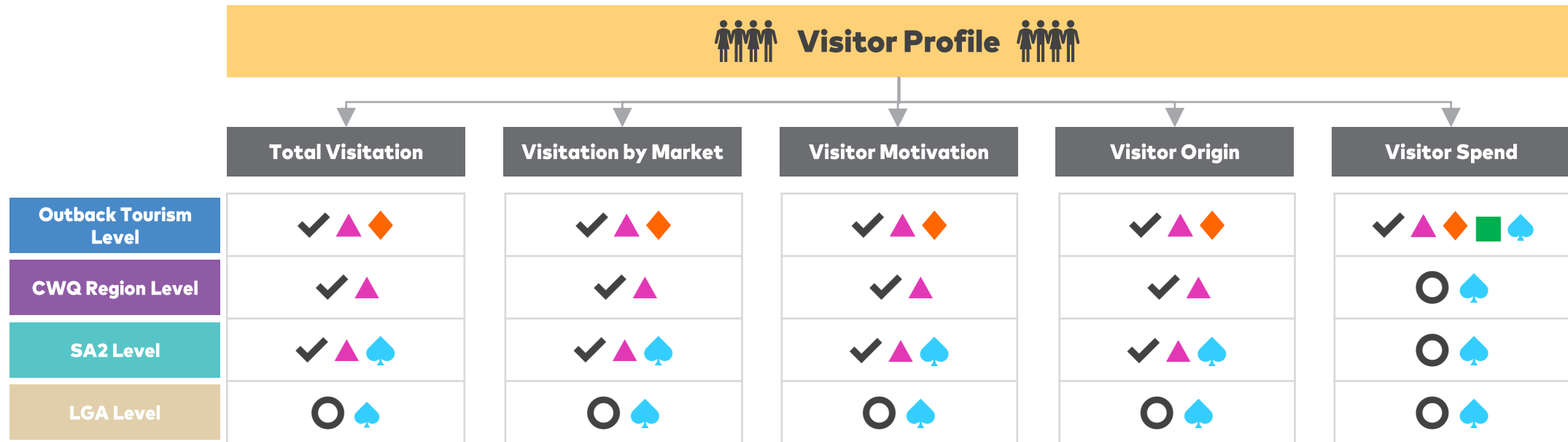
The following figure demonstrates what data has been collected and how the data was collated.

- 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.

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.

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.



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:

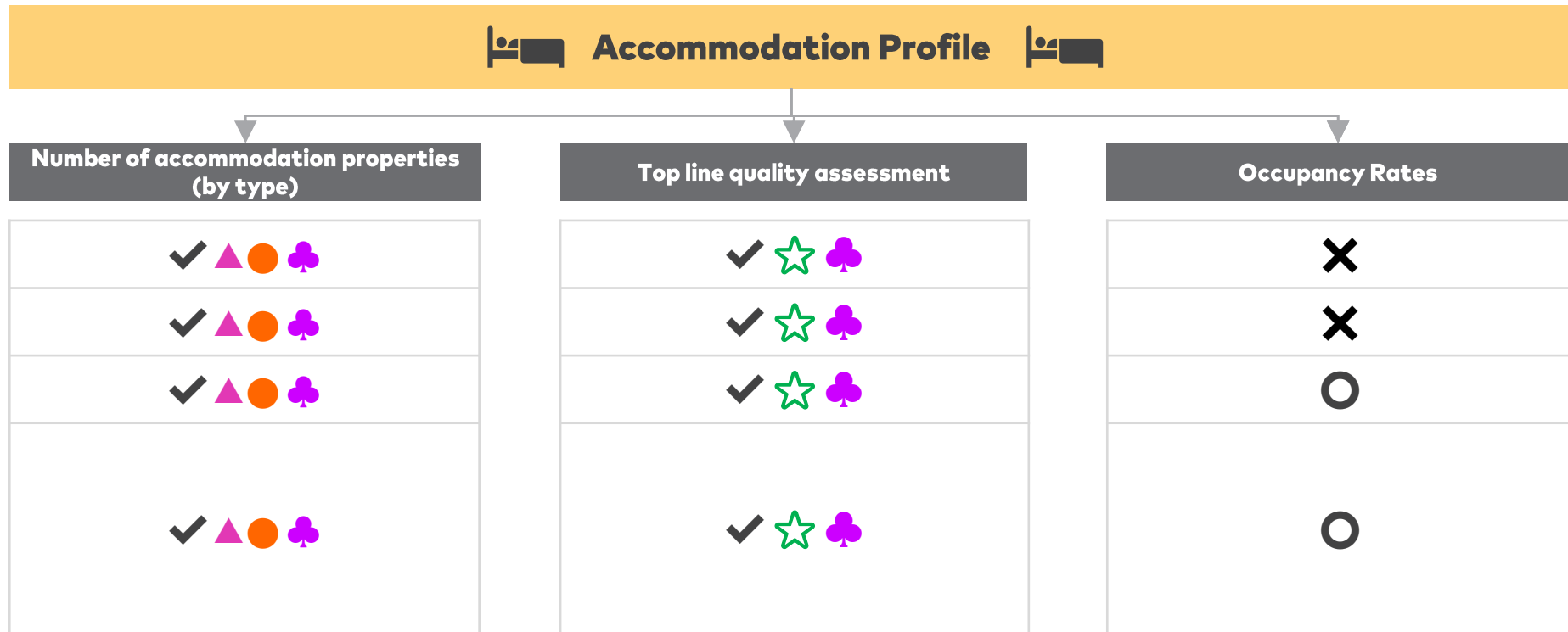
- ✓ Data currently available with suitable sample sizes ○ Data developed through in region consultation and modelling

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

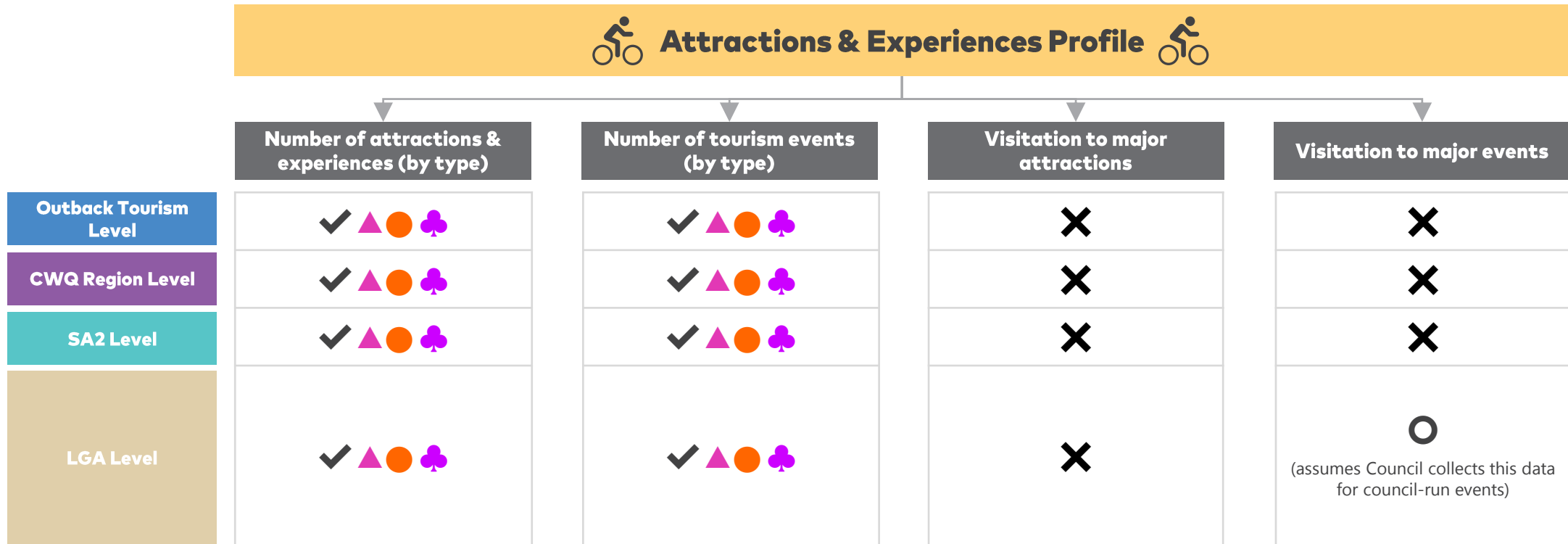
Attractions & Experiences Profile

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:

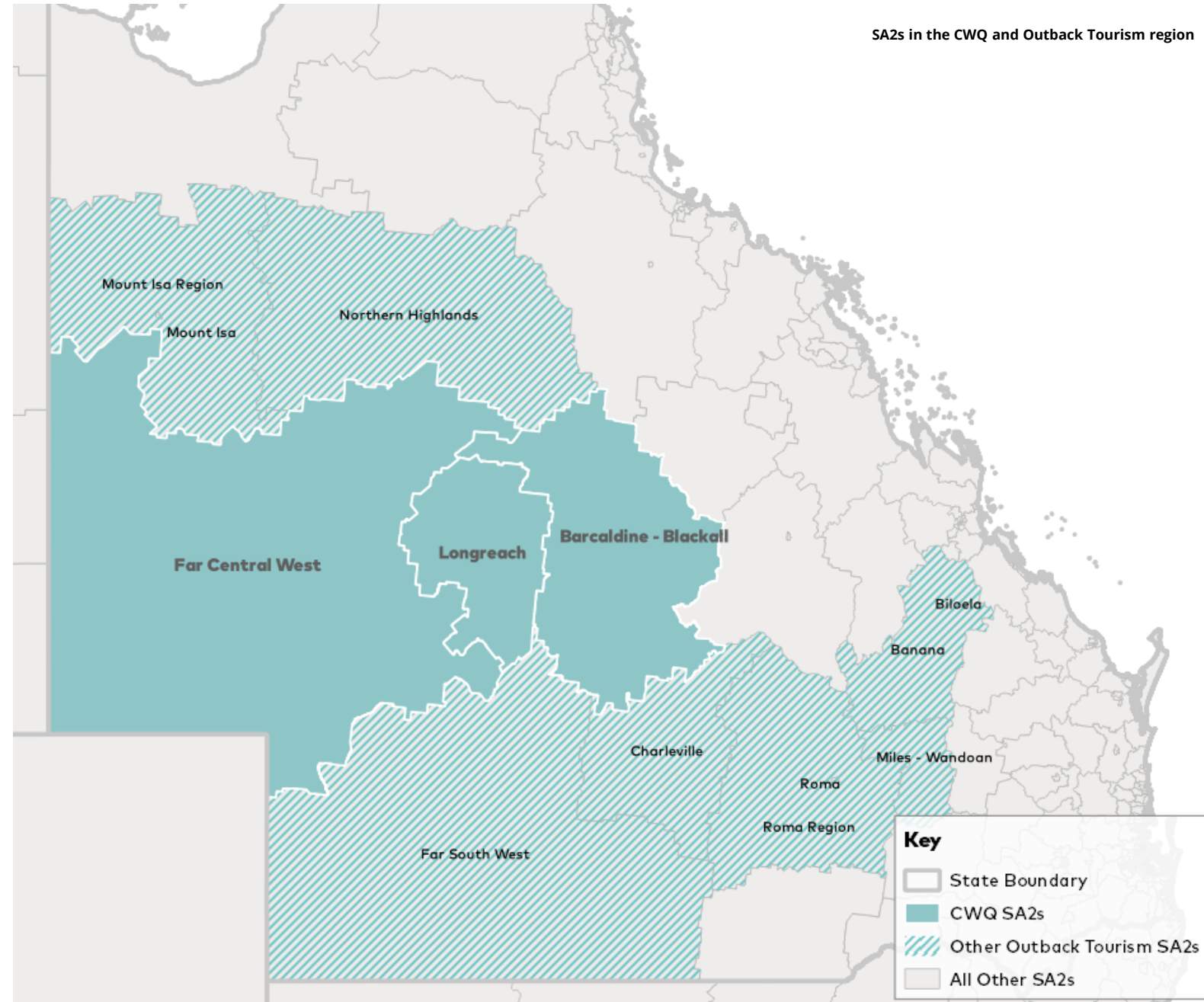
- Far Central West SA2: which includes the LGAs of Barcoo, Boulia, Diamantina and Winton;
- Longreach: which includes only Longreach LGA because of its larger population base; and
- Barcaldine-Blackall: which comprises both Barcaldine and Blackall-Tambo LGAs.

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. 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

Destinati..	Visitor Ty..	Summati..	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Barcaldine - Blackall	Domestic Day	Sample	5	11	9	6	2	4	4	1	4	2	4	3	2	2	5
		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
	Domestic Overnight	Sample	31	38	19	28	24	27	25	28	30	26	27	41	50	51	43
		Visits	87,415	118,575	61,810	84,157	76,137	56,965	68,601	81,628	64,841	59,667	76,747	74,137	122,097	99,126	107,352
	Internati..	Sample	24	24	30	33	35	27	28	20	11	8	10	15	16	14	9
		Visits	2,519	2,519	6,782	6,647	4,716	4,610	3,394	2,768	1,433	1,051	1,925	3,584	3,824	2,562	2,130
Far Central West	Domestic Day	Sample	1	6	4		1	1		2	1	2	2	3	4	4	1
		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
	Domestic Overnight	Sample	35	34	32	27	31	39	34	39	51	27	36	53	53	60	63
		Visits	53,872	104,733	55,410	63,086	85,566	81,176	62,350	97,264	73,061	47,200	74,055	121,496	115,133	125,786	138,657
	Internati..	Sample	30	30	27	34	37	32	32	15	21	23	28	11	20	18	16
		Visits	3,409	3,409	3,006	5,847	4,851	4,509	3,353	1,901	2,920	3,104	5,306	2,152	3,622	4,487	3,814
Longreac..	Domestic Day	Sample	3	3	3	3	2	2	5	3		1		1	5	7	3
		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
	Domestic Overnight	Sample	35	39	24	38	29	50	47	42	49	42	39	58	56	74	51
		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
	Internati..	Sample	14	14	16	27	30	24	25	14	16	26	14	16	13	15	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

Visits to SA2s (5 year averages)

Destination (.	Summation ..	Domestic Day			Domestic Overnight			International		
		2005-2009	2010-2014	2015-2019	2005-2009	2010-2014	2015-2019	2005-2009	2010-2014	2015-2019
Barcaldine - Blackall	Sample	33	15	16	140	136	212	146	94	64
	Visits	92,586	44,280	43,818	85,619	66,341	95,892	4,637	2,651	2,805
Far Central West	Sample	12	6	14	159	190	265	158	123	93
	Visits	27,864	7,575	34,712	72,533	72,210	115,025	4,104	3,158	3,876
Longreach	Sample	14	11	16	165	230	278	101	105	72
	Visits	43,742	35,166	36,652	79,019	112,098	118,961	3,221	3,252	3,051

Sample Check

- Null
- Sample okay
- Sample too small

Overcoming the data deficiencies

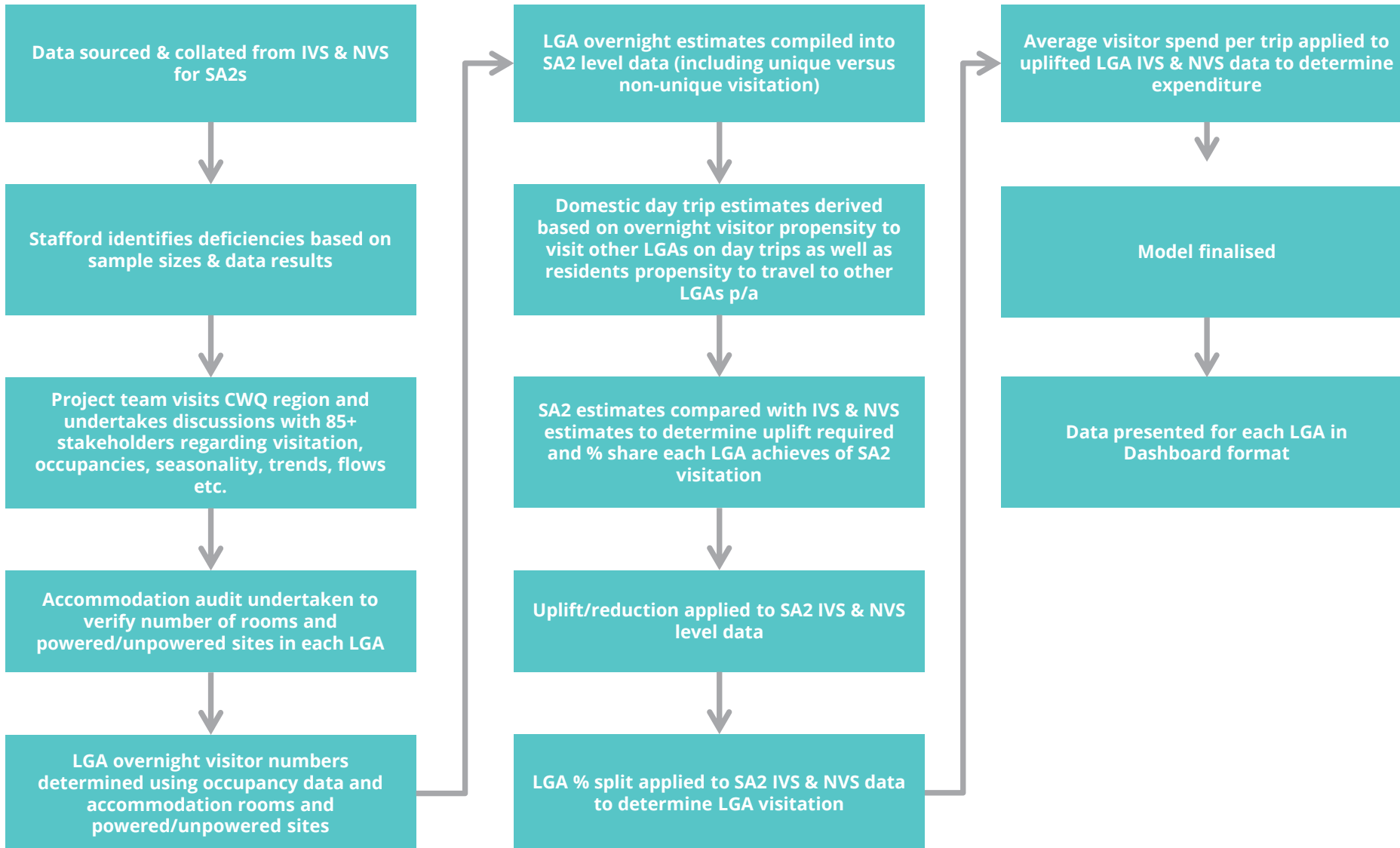
The following table provides a summary of some of the data deficiencies identified and the resolution that was applied to ensure a robust dataset was able to be created.

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:

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

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 over a number of days.

Average Spend per visitor per trip	Barcaldine	Blackall-Tambo	Barcoo	Boulia	Diamantina	Winton	Longreach
Domestic Day	\$105	\$80	\$80	\$80	\$80	\$135	\$165
Domestic Overnight	\$820	\$740	\$740	\$740	\$780	\$840	\$880
International	\$700	\$620	\$620	\$620	\$660	\$740	\$760

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.

Other points

The model has been designed to enable RAPAD (or other selected individuals/organisations) to input into and update the model on an annual basis. As such, the methodology applied has had to be far more detailed.

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	Redacted because of commercial sensitivities						
Avg Annual Occupancy Rate - Off Peak	Redacted because of commercial sensitivities						
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	Redacted because of commercial sensitivities						
Avg Annual Occupancy Rate - Off Peak	Redacted because of commercial sensitivities						
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%

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.

Because there is a desire for this visitor model created for the CWQ region to be updated annually, there is a need to be able to feed in IVS/NVS data and uplift/decrease this data to reflect a more accurate picture of both SA2 and LGA visitor data on an ongoing basis.

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

- 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.

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%	

VISITATION DATA DASHBOARDS

Overview

In order to make the visitation data easy to access and understand, Dashboards have been created for each LGA in the CWQ region. The Dashboards display:

- 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 Dashboards are able to be manipulated with the following filters:

1. Year
Select year. Applies to all but Chart 2.
Note: Select only one year

2009
2014
2019

2. Visitor Type
Select visitor type. To display all visitor types click clear filter button. Applies to charts 1 and 4 only.

Domestic Day
Domestic Overnight
International

3. Visitor Motivation
Select a motivation type to filter data. To display all motivations (i.e. all visitor data) click clear filter button. Applicable to charts 1, 2, 3, 5, 6 and 8.

Business
Holiday
Other
VFR

When new data for 2020 on is loaded into the database and the applicable steps followed, the Dashboards will automatically display new data.

The Dashboards also contain an inbuilt macro which enables the data coordinator/contractor to save the Dashboard as a PDF to enable any updated data to be provided to each Council and its relevant stakeholders.

Barcaldine LGA Dashboard

Barcaldine LGA
> TOURISM DASHBOARD

Filters

Purple shading indicates filter is selected.

1. Year
Select year. Applies to all charts.
Note: Select only one year

2009
2014
2019

2. Visitor Type
Select visitor type. To display all visitor types click clear filter button. Applies to charts 1 and 4 only.

Domestic Day
Domestic Overnight
International

3. Visitor Motivation
Select a motivation type to filter data. To display all motivations (i.e. all visitor data) click clear filter button. Applicable to charts 1, 2, 3, 5, 6 and 8.

Business
Holiday
Other
VFR

1. Total LGA Visitation to all LGAs (All Visitor Types)

LGA	2014	2019
Barcaldine LGA	145.2k	306.2k
Blackall-Tambo LGA	67.0k	
Barcoo LGA	36.3k	
Boulia LGA	37.6k	
Diamantina LGA	41.6k	
Winton LGA	119.2k	
Longreach LGA		306.2k

2. Visitation to Barcaldine

Visitor Type	2014	2019
Domestic Day	23.9k	23.7k
Domestic Overnight	82.4k	119.1k
International	2.3k	2.4k

3. Visitor type to Barcaldine (share of total visitation)

Visitor Type	Share
Domestic Day	16%
Domestic Overnight	82%
International	2%

4. Motivation of Visitation to Barcaldine

Motivation	Share
Business	47%
Holiday	26%
Other	10%
VFR	17%

5. State of Origin of Domestic Overnight Visitors

State	Count
Queensland	509
Western Australia	486
South Australia	4k
Victoria	78k
Tasmania	11k
ACT	167

7. Visitor Spend in Barcaldine (spend p/visitor p/trip)

Visitor Type	Average Spend
International	\$700
Domestic Overnight	\$820
Domestic Day	\$105

8. Visitor Spend in Barcaldine (total visitor spend)

Visitor Type	Total Spend
Domestic Day	\$2.5m
Domestic Overnight	\$97.7m
International	\$1.7m
Total Visitor Spend in Barcaldine	\$101.9m

6. Country of origin of international visitors

Country	Count
All Asia (ex China)	826
All Europe	660
China	330
North America	264
NZ	170
Other Asia	138
UK	42

Blackall-Tambo LGA

> TOURISM DASHBOARD



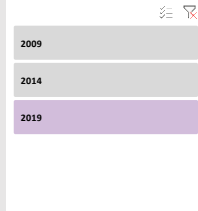
Filters

Purple shading indicates filter is selected.

1. Year

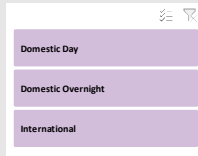
Select year. Applies to all charts.

Note: Select only one year



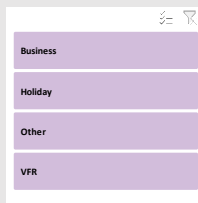
2. Visitor Type

Select visitor type. To display all visitor types click clear filter button. Applies to charts 1 and 4 only.

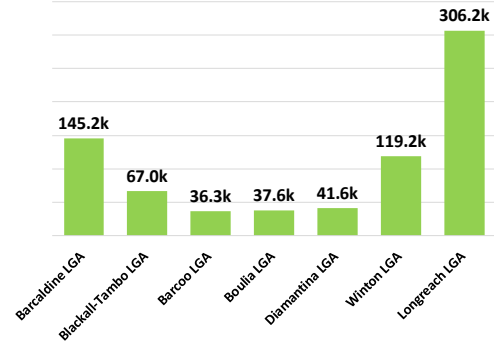


3. Visitor Motivation

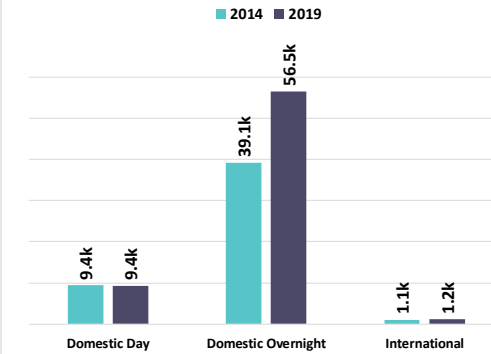
Select a motivation type to filter data. To display all motivations (i.e. all visitor data) click clear filter button. Applicable to charts 1, 2, 3, 5, 6 and 8.



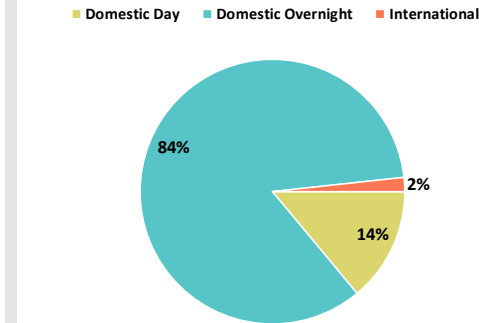
1. Total LGA Visitation to all LGAs (All Visitor Types)



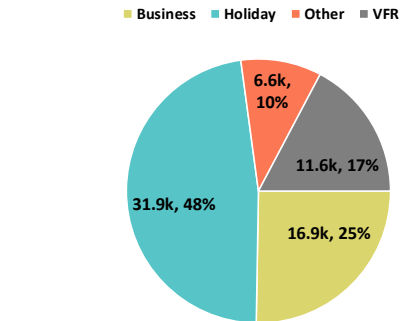
2. Visitation to Blackall-Tambo



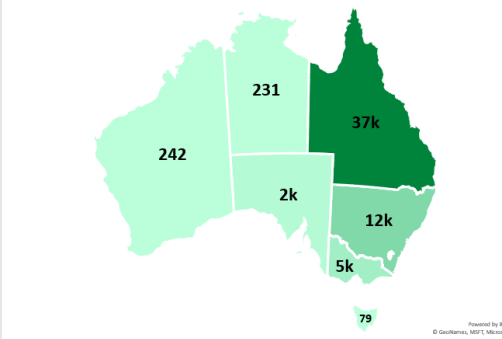
3. Visitor type to Blackall-Tambo (share of total visitation)



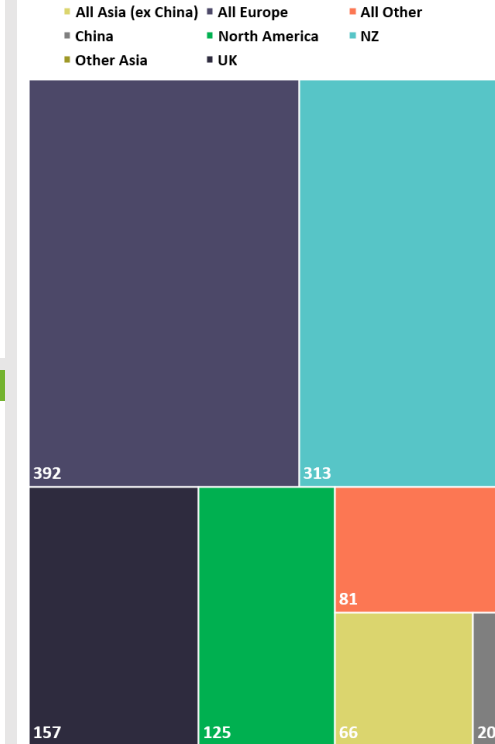
4. Motivation of Visitation to Blackall-Tambo



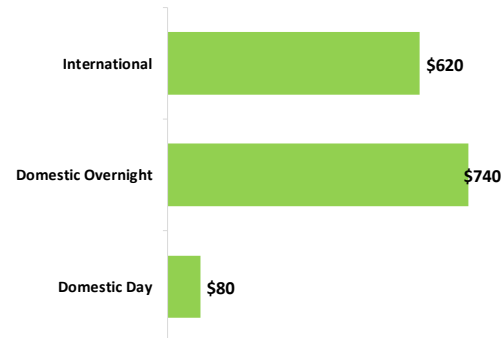
5. State of Origin of Domestic Overnight Visitors



6. Country of origin of international visitors



7. Visitor Spend in Blackall-Tambo (spend p/visitor p/trip)



8. Visitor Spend in Blackall-Tambo (total visitor spend)



Barcoo LGA

> TOURISM DASHBOARD



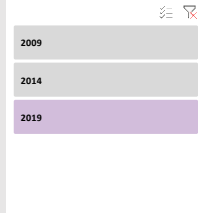
Filters

Purple shading indicates filter is selected.

1. Year

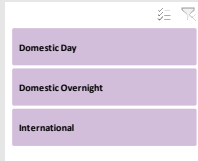
Select year. Applies to all charts.

Note: Select only one year



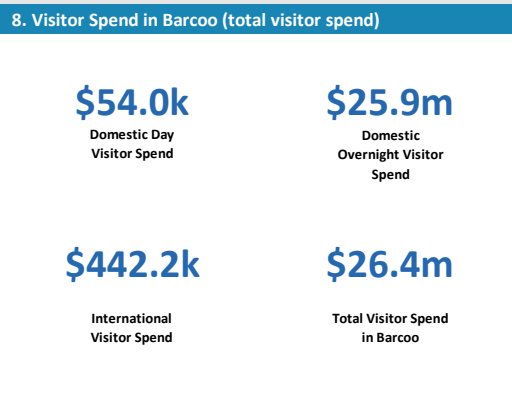
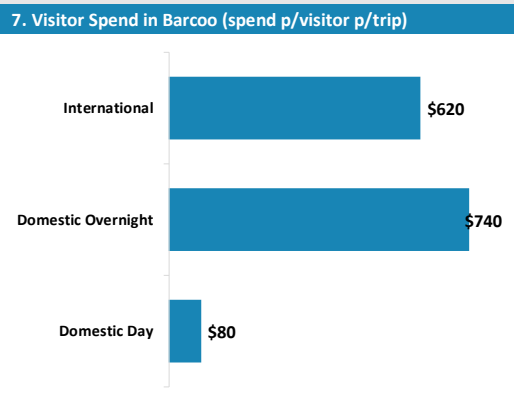
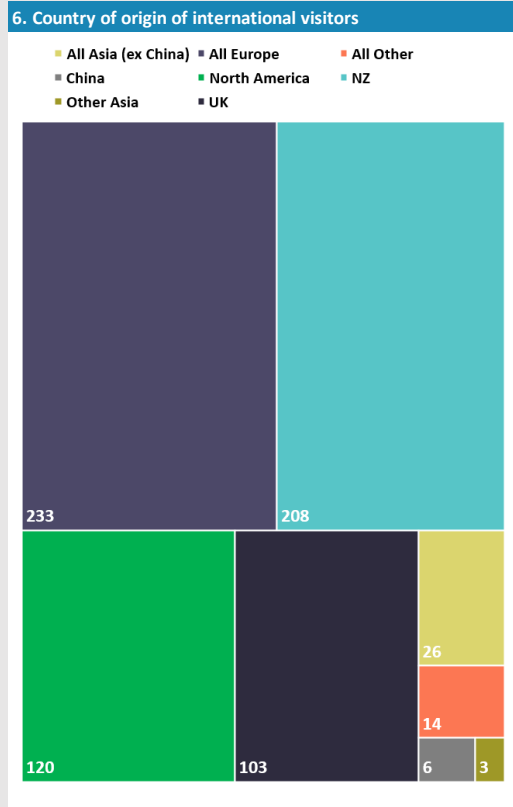
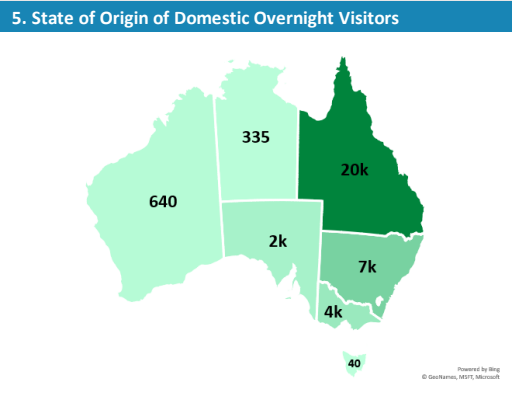
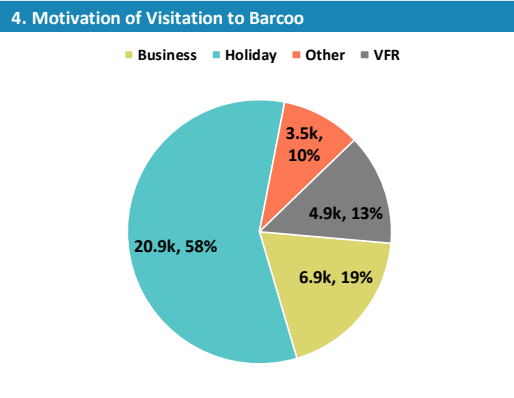
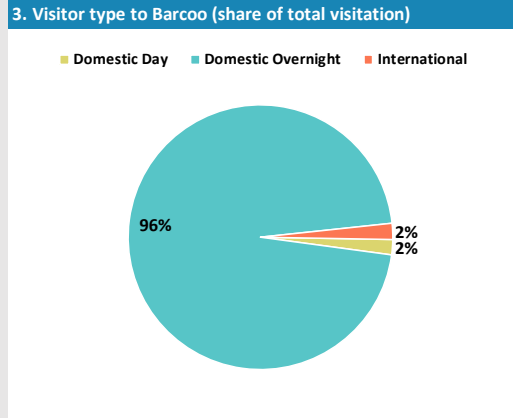
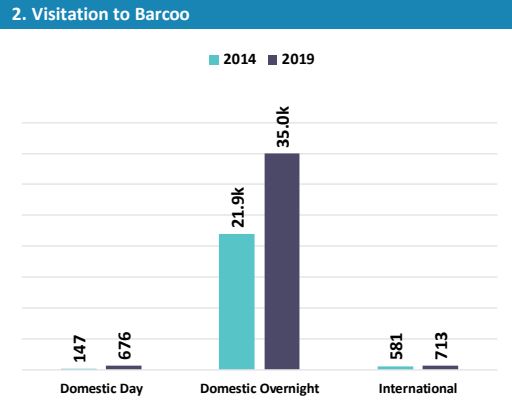
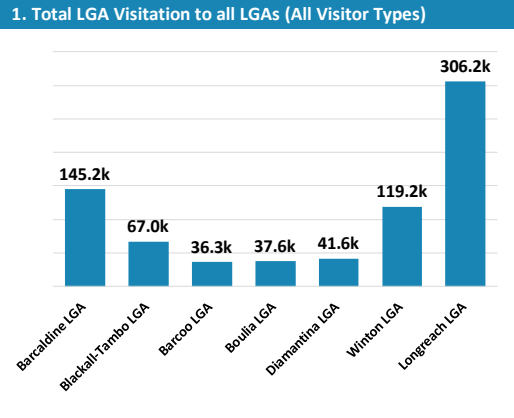
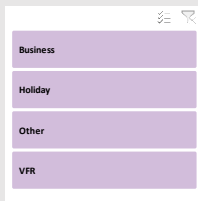
2. Visitor Type

Select visitor type. To display all visitor types click clear filter button. Applies to charts 1 and 4 only.



3. Visitor Motivation

Select a motivation type to filter data. To display all motivations (i.e. all visitor data) click clear filter button. Applicable to charts 1, 2, 3, 5, 6 and 8.



Boulia LGA

> TOURISM DASHBOARD



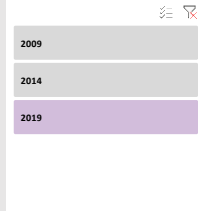
Filters

Purple shading indicates filter is selected.

1. Year

Select year. Applies to all charts.

Note: Select only one year



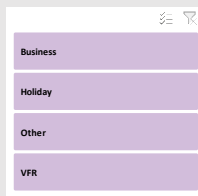
2. Visitor Type

Select visitor type. To display all visitor types click clear filter button. Applies to charts 1 and 4 only.

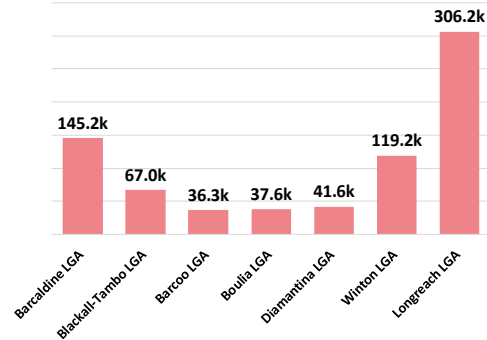


3. Visitor Motivation

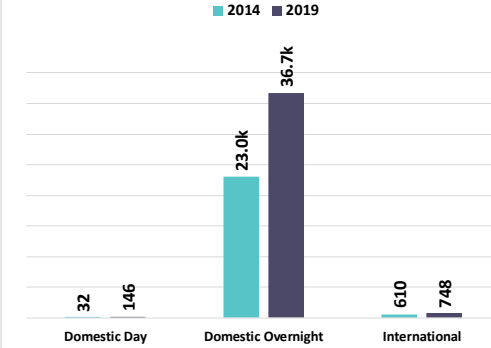
Select a motivation type to filter data. To display all motivations (i.e. all visitor data) click clear filter button. Applicable to charts 1, 2, 3, 5, 6 and 8.



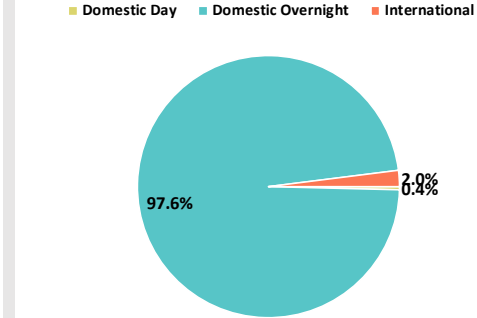
1. Total LGA Visitation to all LGAs (All Visitor Types)



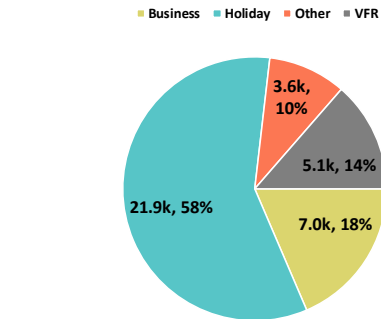
2. Visitation to Boulia



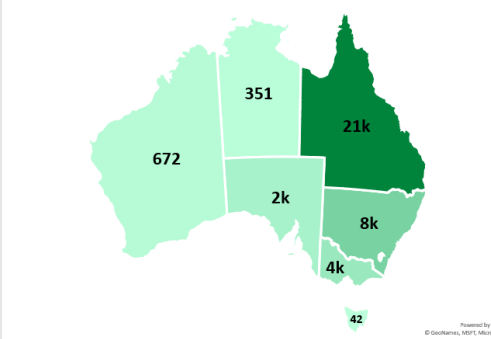
3. Visitor type to Boulia (share of total visitation)



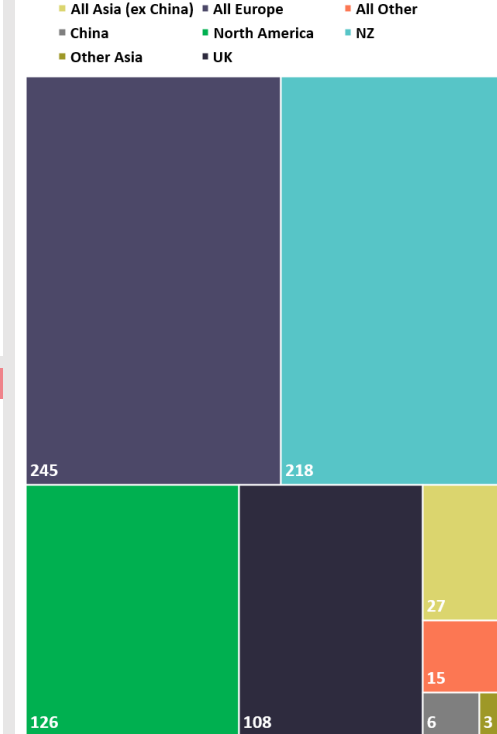
4. Motivation of Visitation to Boulia



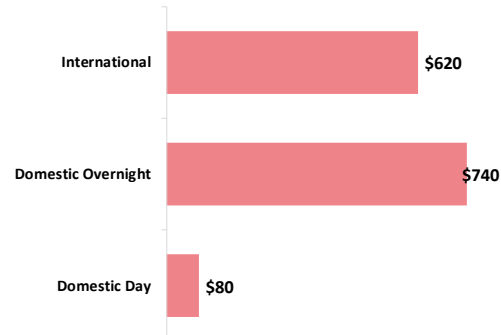
5. State of Origin of Domestic Overnight Visitors



6. Country of origin of international visitors



7. Visitor Spend in Boulia (spend p/visitor p/trip)



8. Visitor Spend in Boulia (total visitor spend)



Diamantina LGA

> TOURISM DASHBOARD



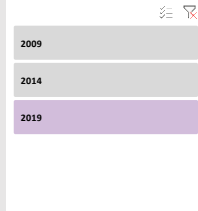
Filters

Purple shading indicates filter is selected.

1. Year

Select year. Applies to all charts.

Note: Select only one year



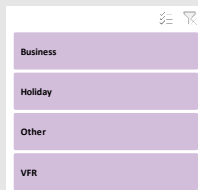
2. Visitor Type

Select visitor type. To display all visitor types click clear filter button. Applies to charts 1 and 4 only.

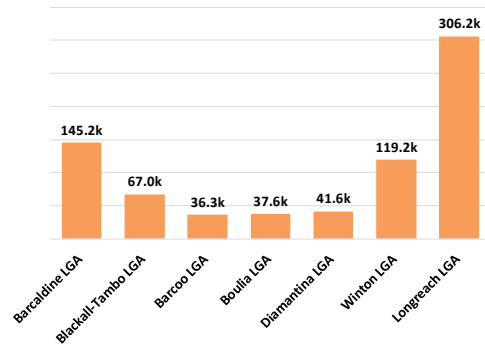


3. Visitor Motivation

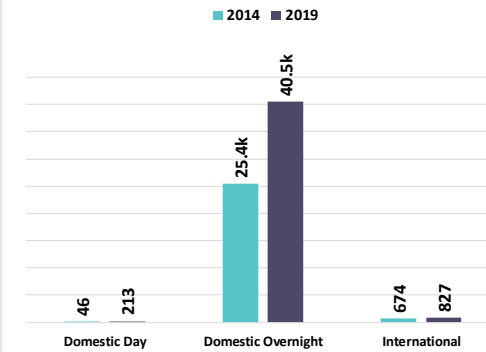
Select a motivation type to filter data. To display all motivations (i.e. all visitor data) click clear filter button. Applicable to charts 1, 2, 3, 5, 6 and 8.



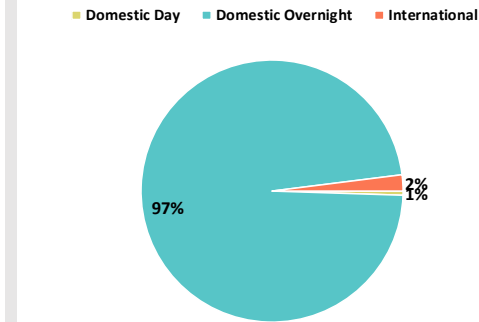
1. Total LGA Visitation to all LGAs (All Visitor Types)



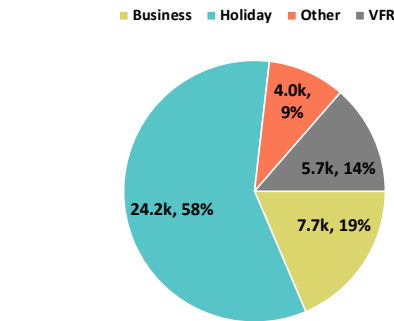
2. Visitation to Diamantina



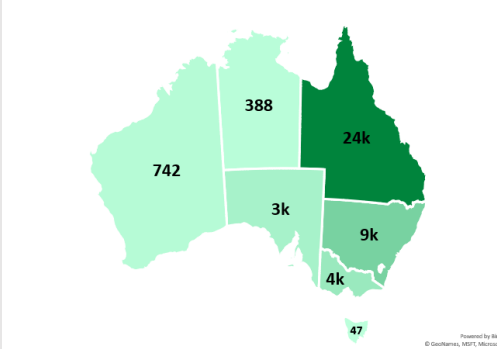
3. Visitor type to Diamantina (share of total visitation)



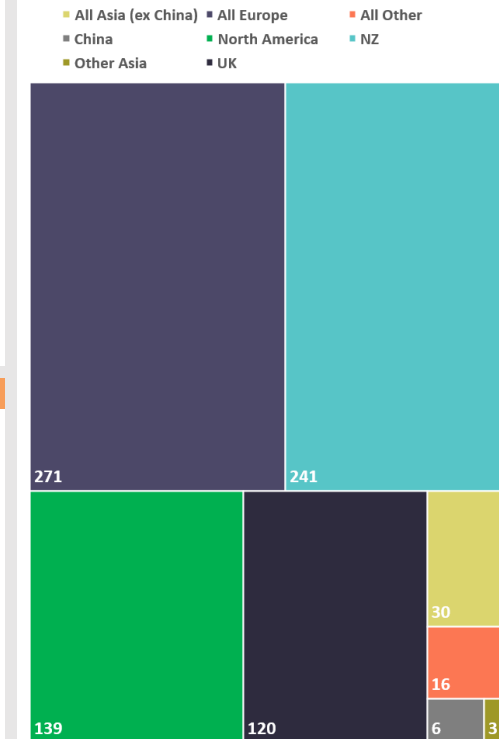
4. Motivation of Visitation to Diamantina



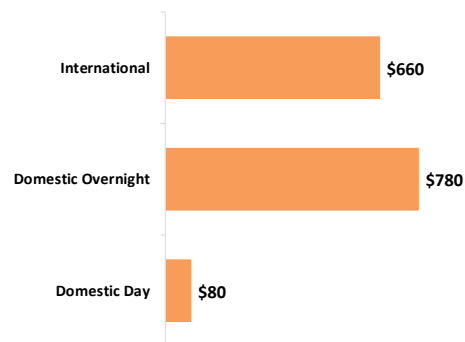
5. State of Origin of Domestic Overnight Visitors



6. Country of origin of international visitors



7. Visitor Spend in Diamantina (spend p/visitor p/trip)



8. Visitor Spend in Diamantina (total visitor spend)



Winton LGA

> TOURISM DASHBOARD



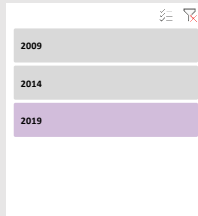
Filters

Purple shading indicates filter is selected.

1. Year

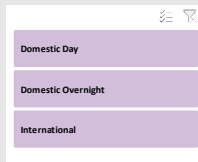
Select year. Applies to all charts.

Note: Select only one year



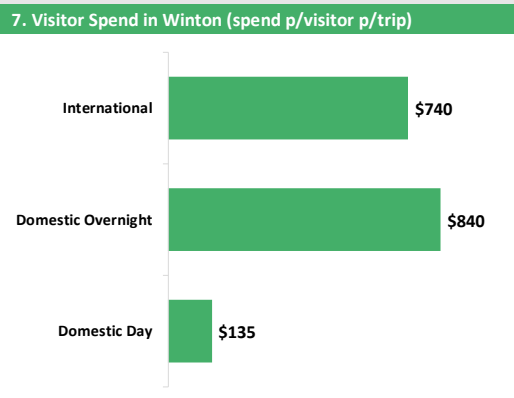
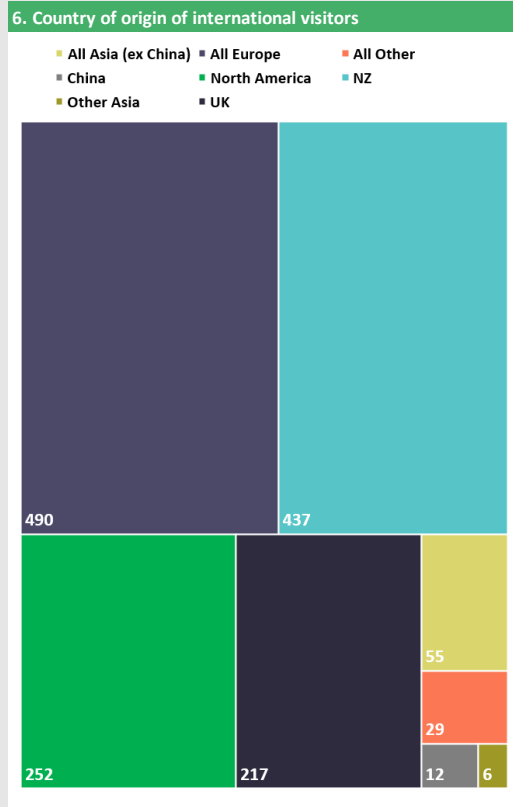
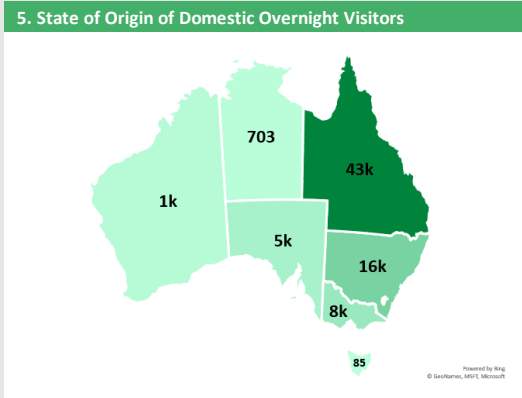
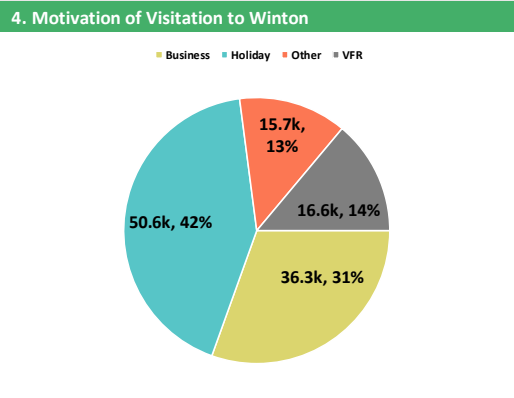
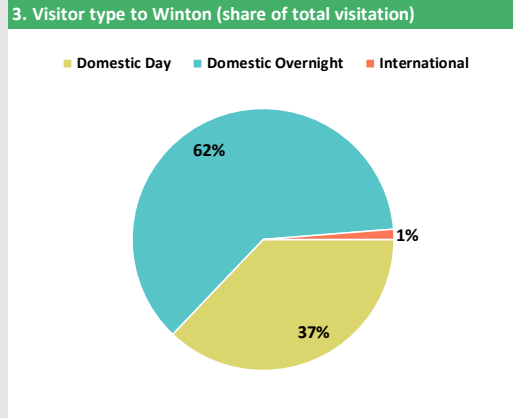
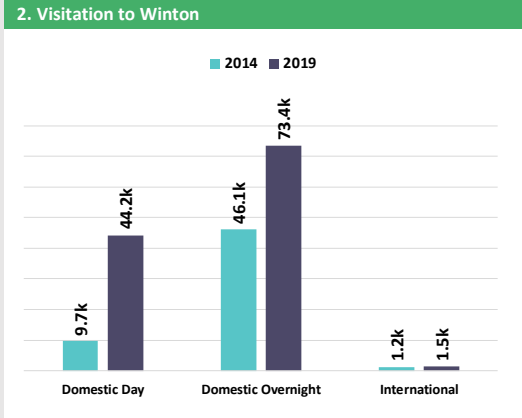
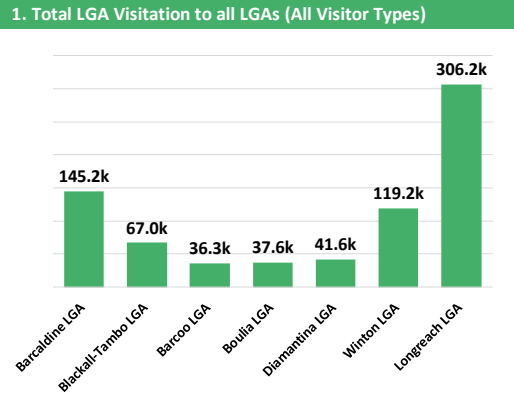
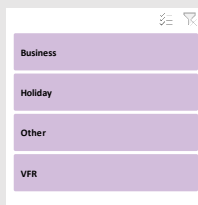
2. Visitor Type

Select visitor type. To display all visitor types click clear filter button. Applies to charts 1 and 4 only.



3. Visitor Motivation

Select a motivation type to filter data. To display all motivations (i.e. all visitor data) click clear filter button. Applicable to charts 1, 2, 3, 5, 6 and 8.



Longreach LGA

> TOURISM DASHBOARD



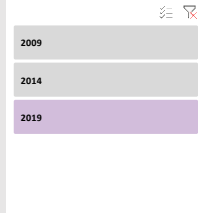
Filters

Purple shading indicates filter is selected.

1. Year

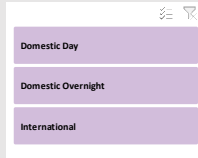
Select year. Applies to all charts.

Note: Select only one year



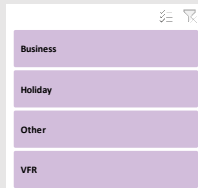
2. Visitor Type

Select visitor type. To display all visitor types click clear filter button. Applies to charts 1 and 4 only.

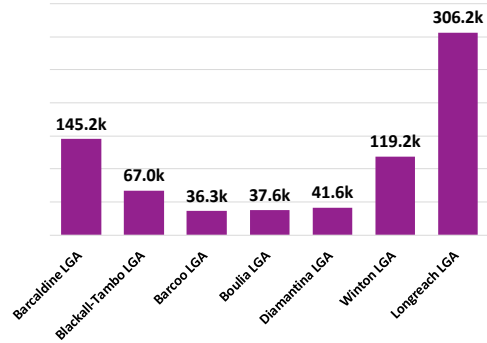


3. Visitor Motivation

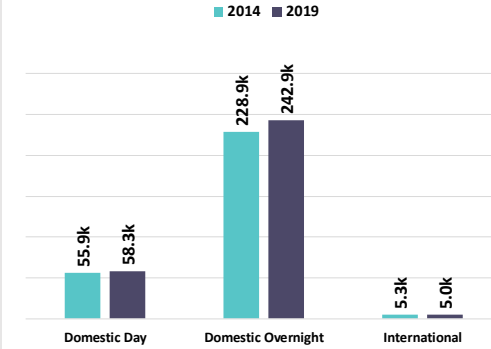
Select a motivation type to filter data. To display all motivations (i.e. all visitor data) click clear filter button. Applicable to charts 1, 2, 3, 5, 6 and 8.



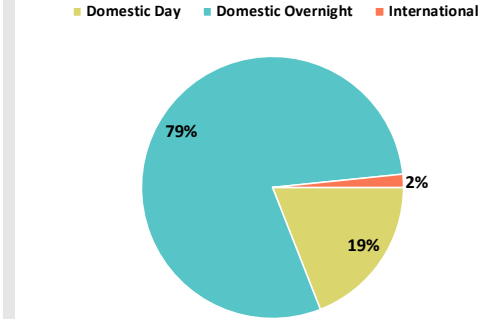
1. Total LGA Visitation to all LGAs (All Visitor Types)



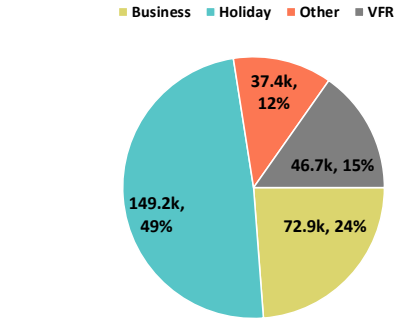
2. Visitation to Longreach



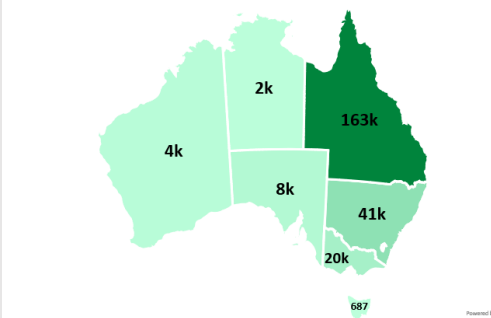
3. Visitor type to Longreach (share of total visitation)



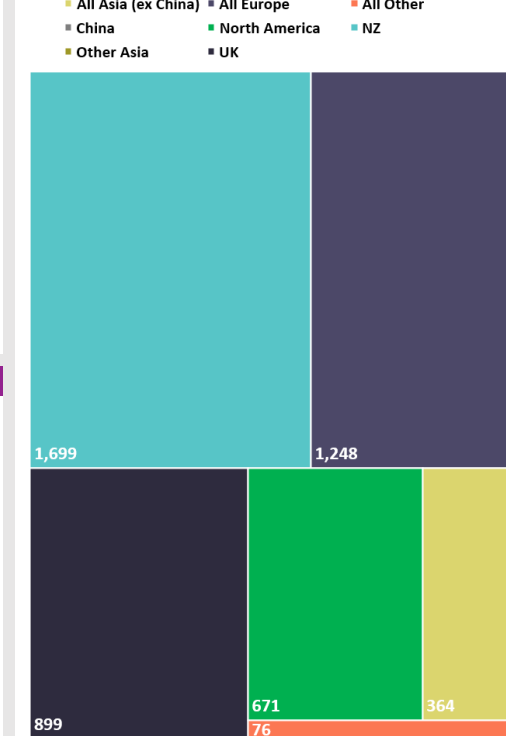
4. Motivation of Visitation to Longreach



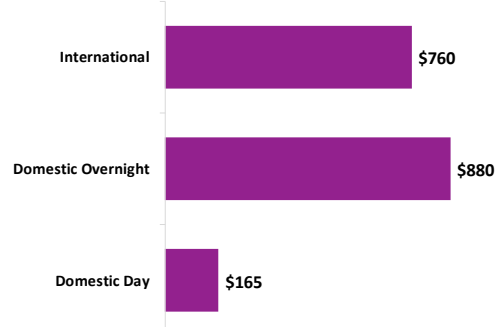
5. State of Origin of Domestic Overnight Visitors



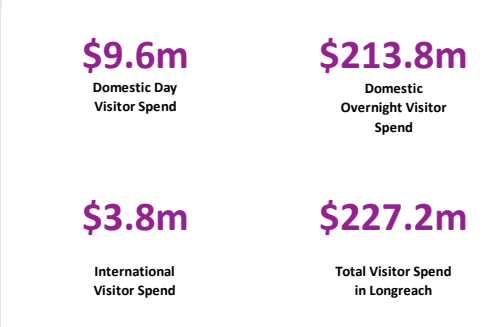
6. Country of origin of international visitors



7. Visitor Spend in Longreach (spend p/visitor p/trip)



8. Visitor Spend in Longreach (total visitor spend)

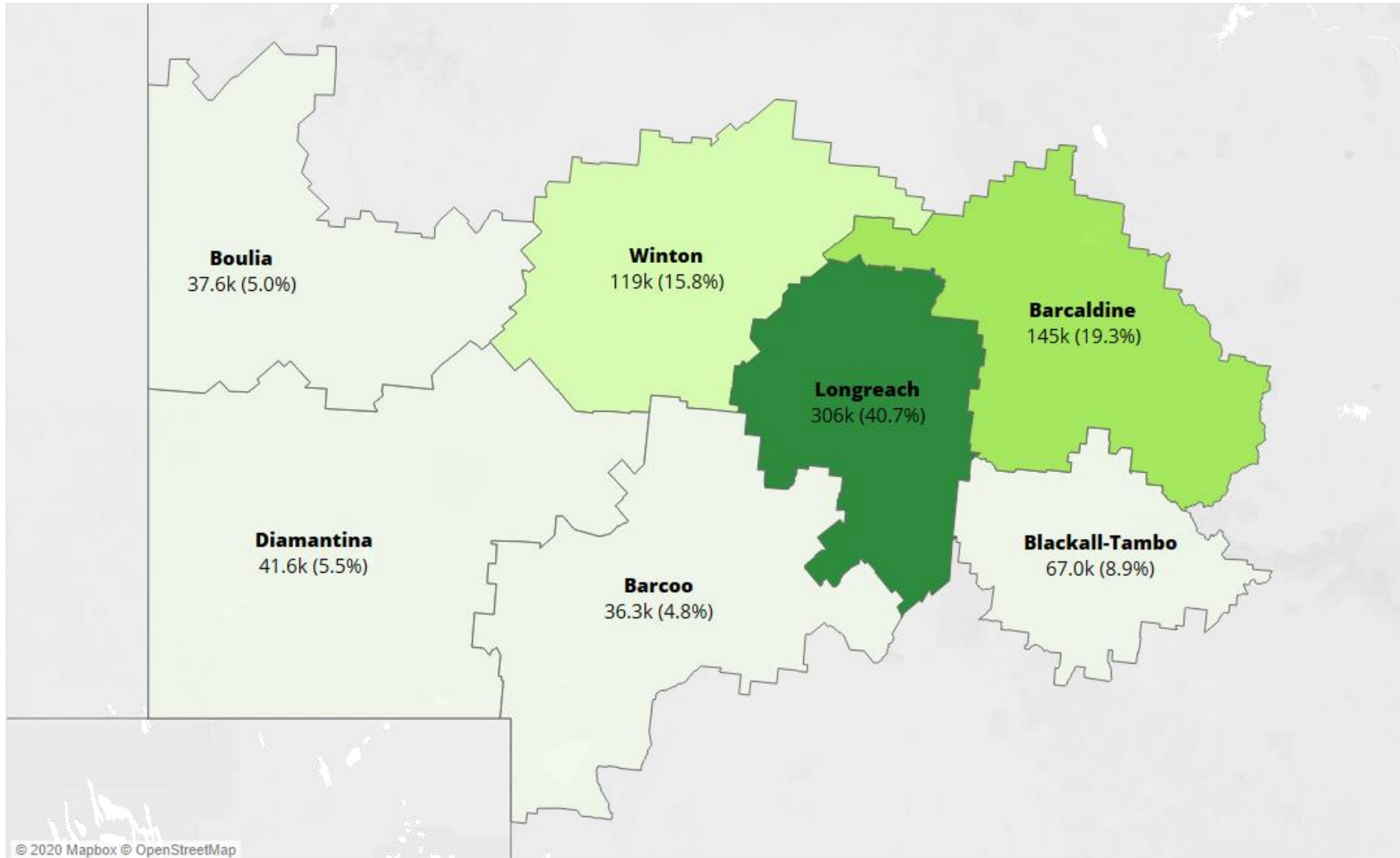


Overview

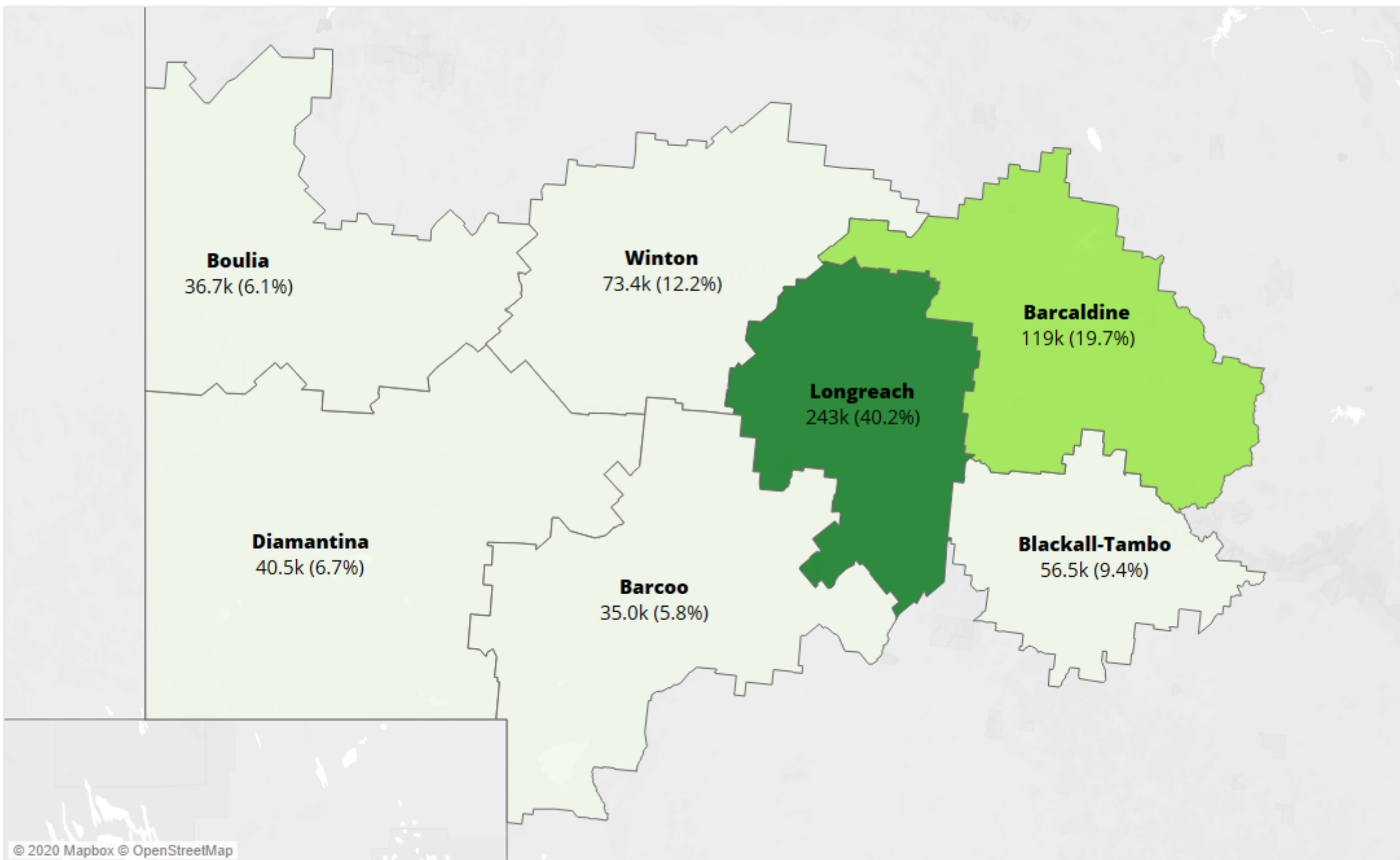
In addition to the dashboards created for each LGA, a variety of heat maps and charts have also been created to allow for comparison within the CWQ region.

It is important to note that these data-maps are produced in Tableau, software that focuses on big data. Should RAPAD wish to produce ongoing heat mapping with data from 2020 on, this will require specialist input to work closely with the selected data coordinator/contractor.

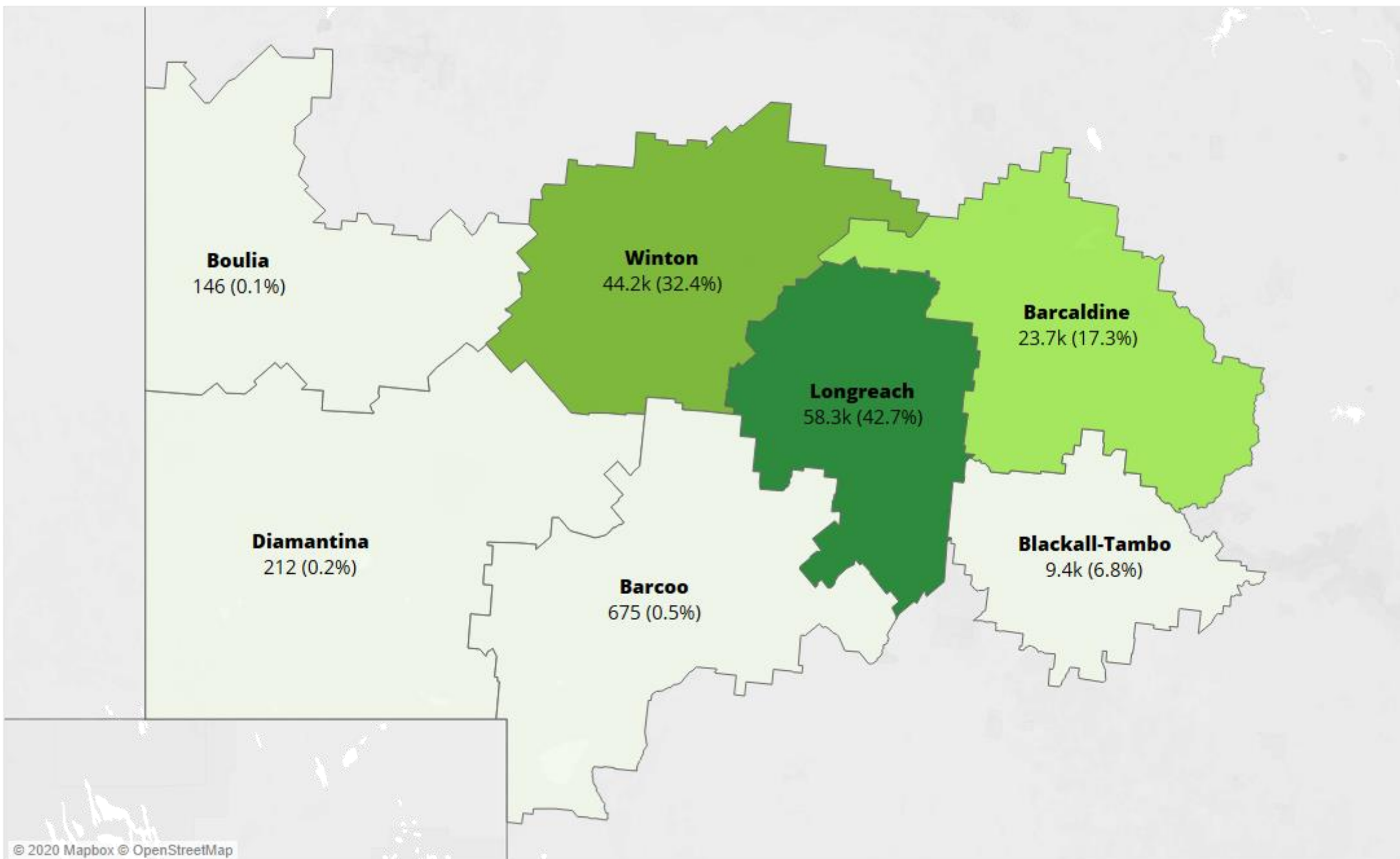
All Visitation to CWQ LGAs (2019)



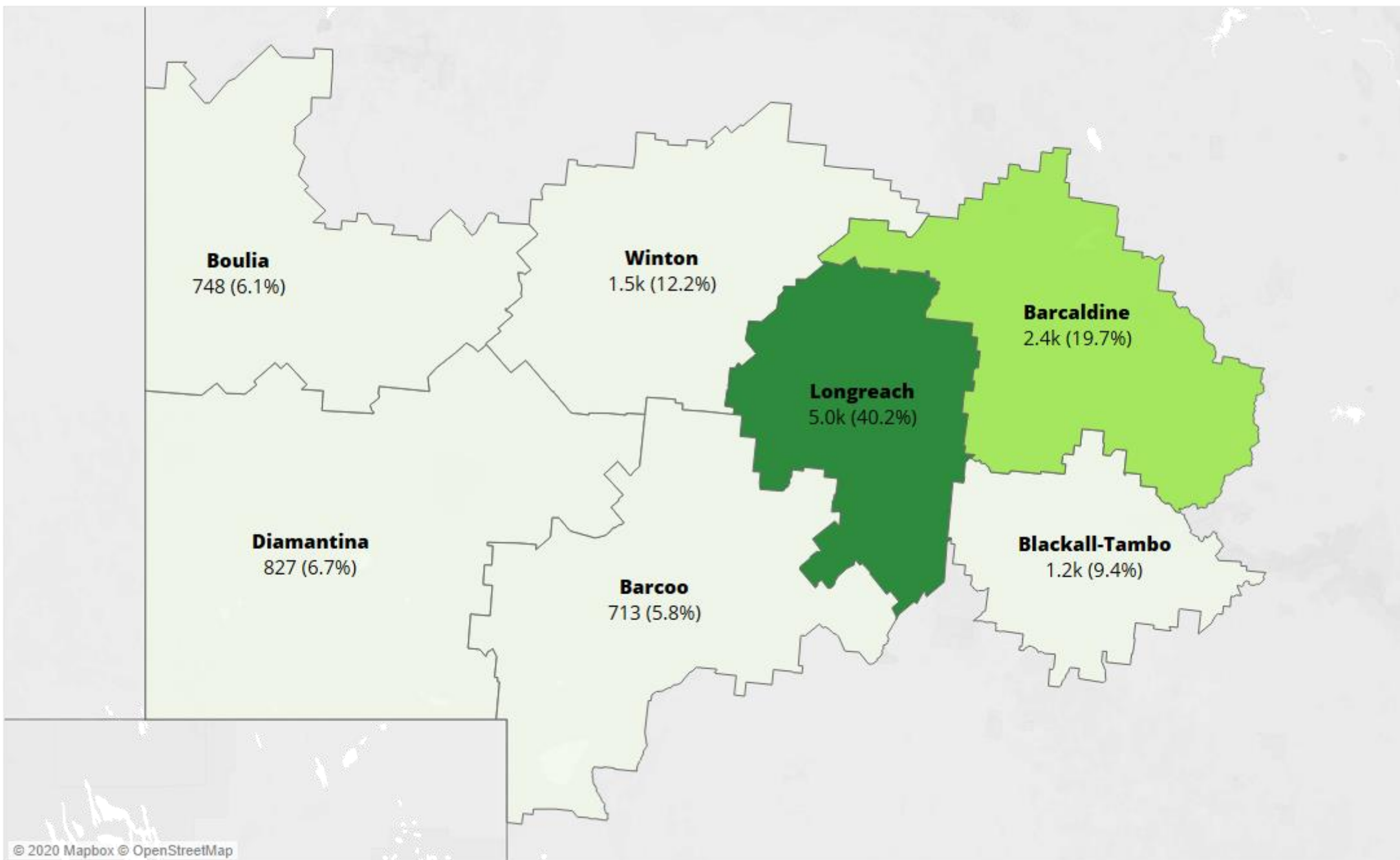
Domestic Overnight to CWQ LGAs (2019)



Domestic Day to CWQ LGAs (2019)



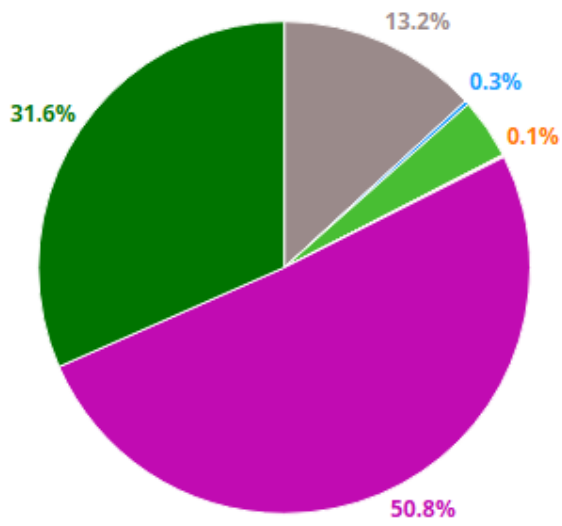
International to CWQ LGAs (2019)



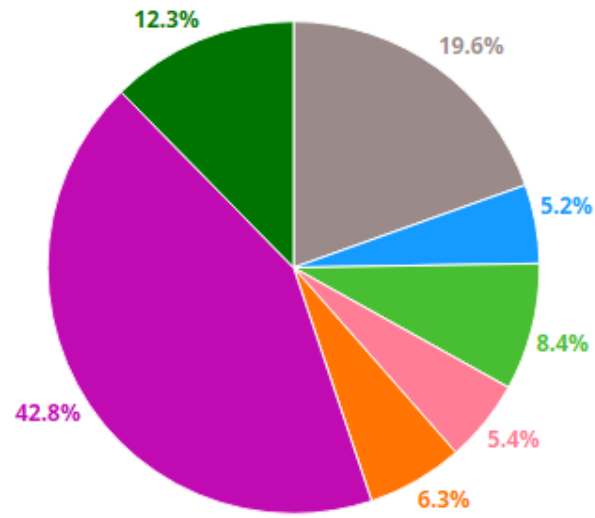
Total Visitation to CWQ LGAs by Visitor Type Share (2019)



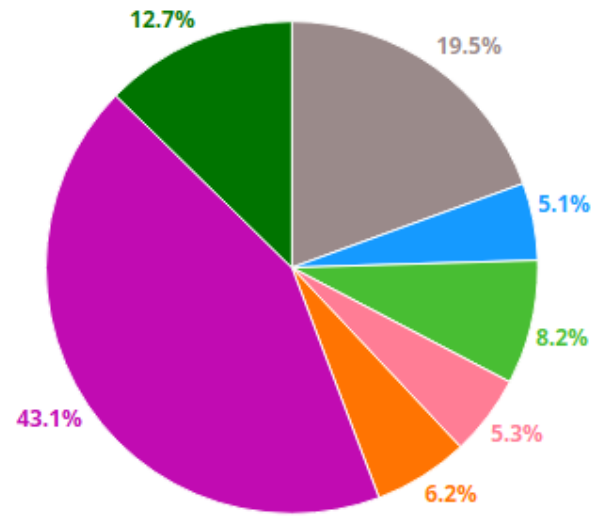
Domestic Day



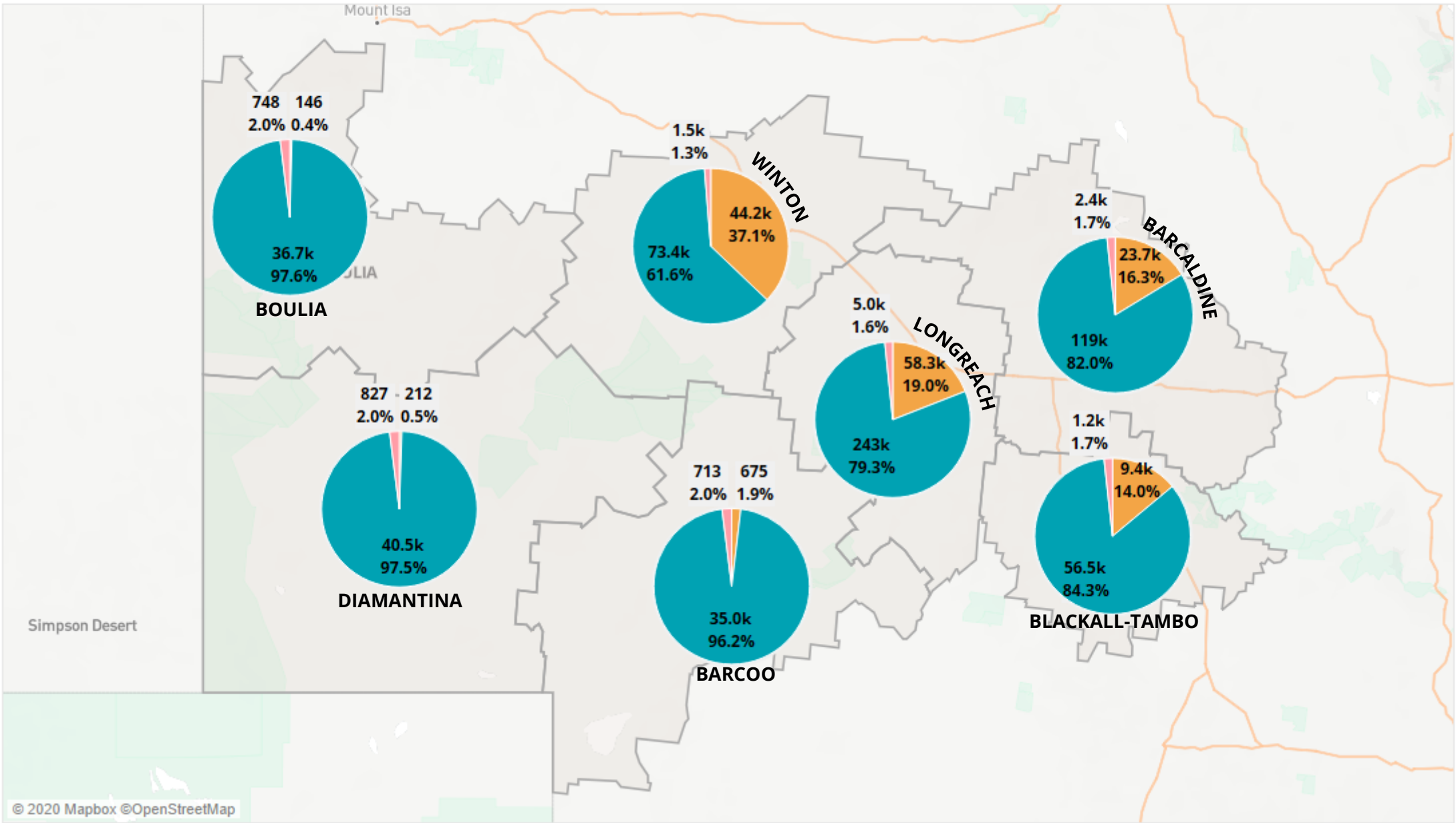
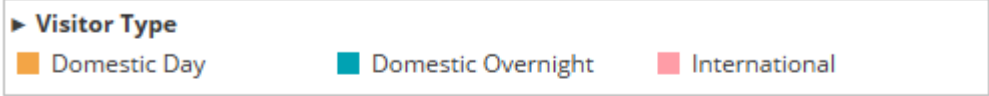
Domestic Overnight



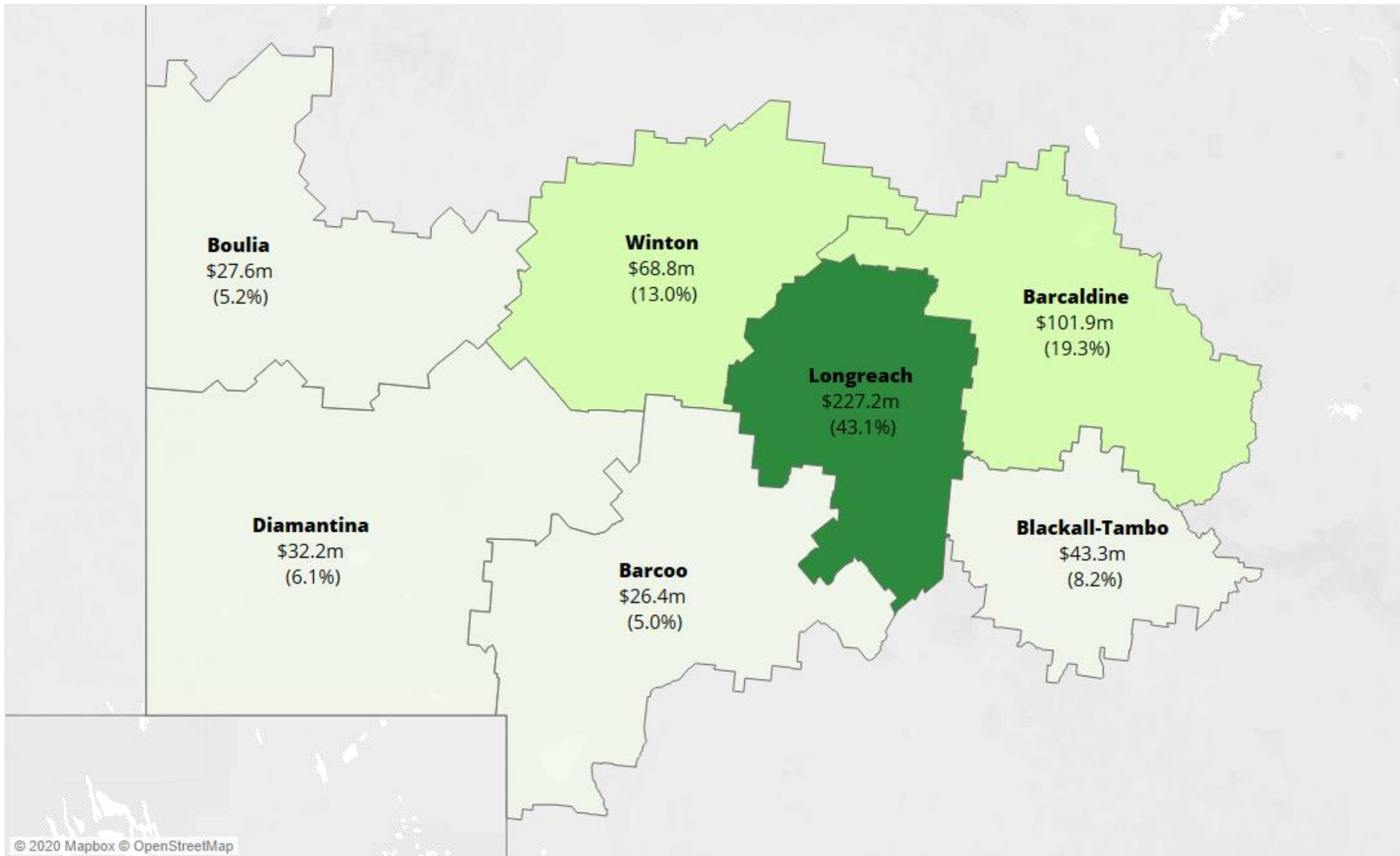
International



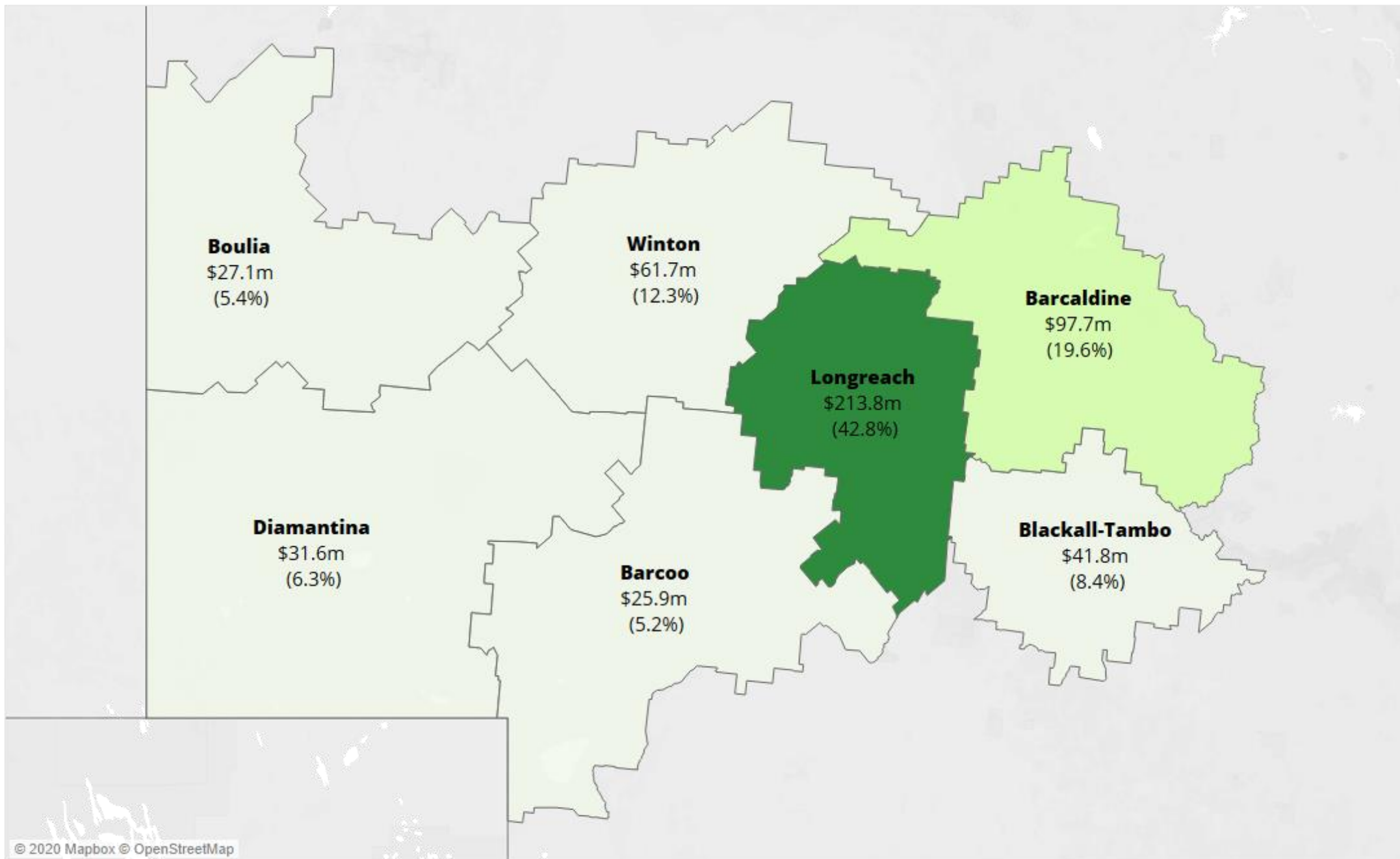
Visitation to each LGA by Visitor Type (2019)



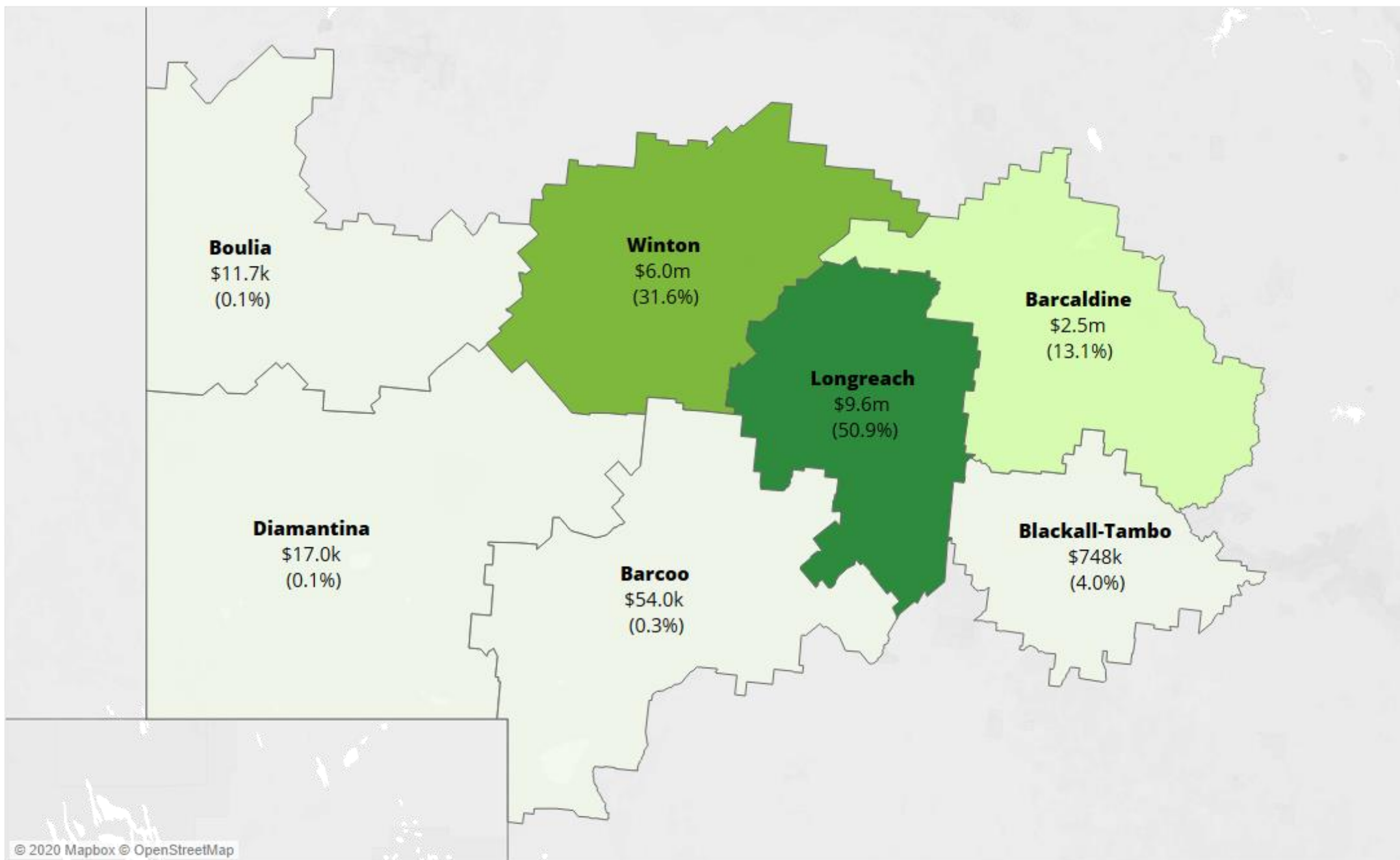
All Visitor Spend by LGA (2019)



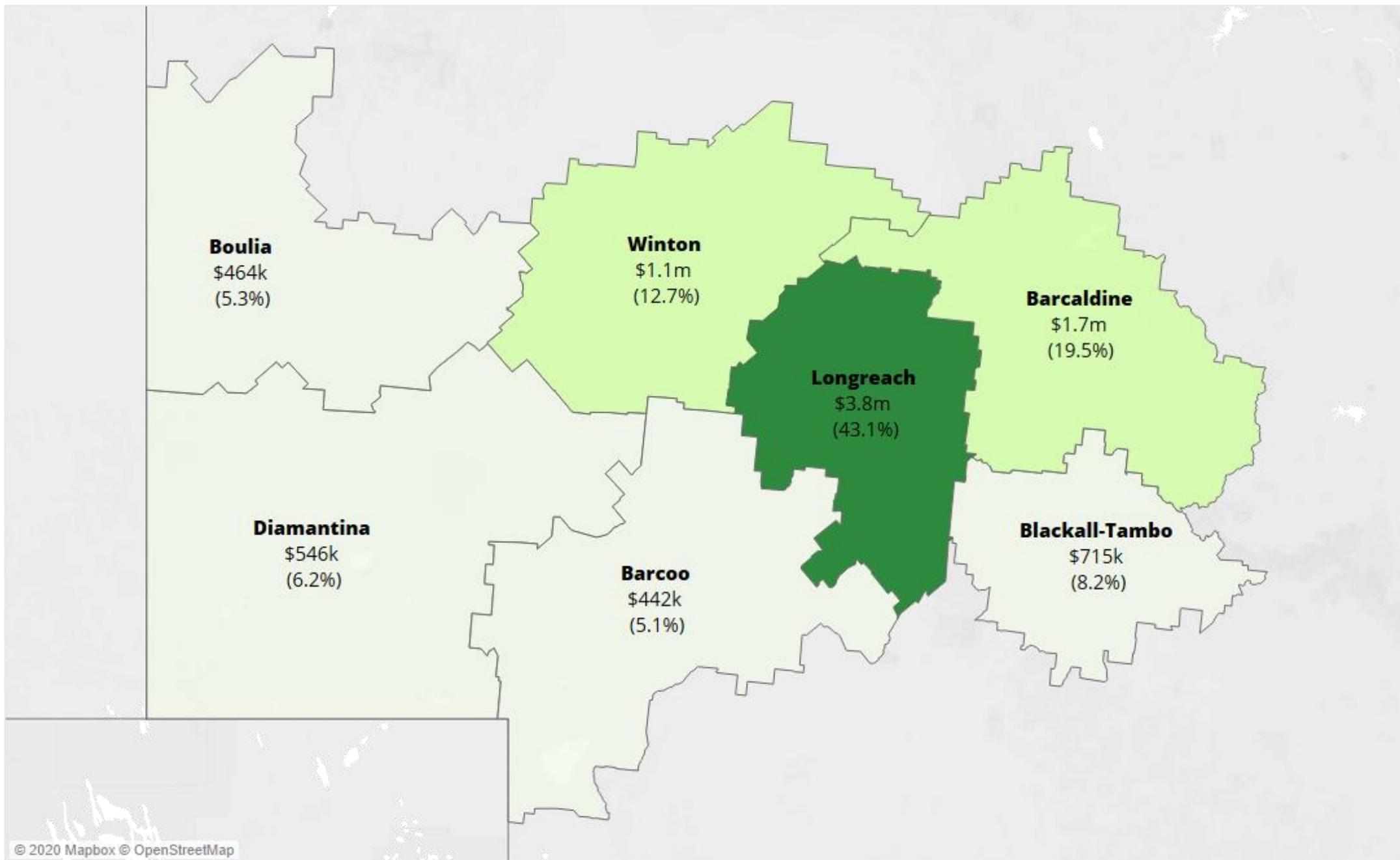
Domestic Overnight Visitor Spend by LGA (2019)



Domestic Day Visitor Spend by LGA (2019)



International Visitor Spend by LGA (2019)



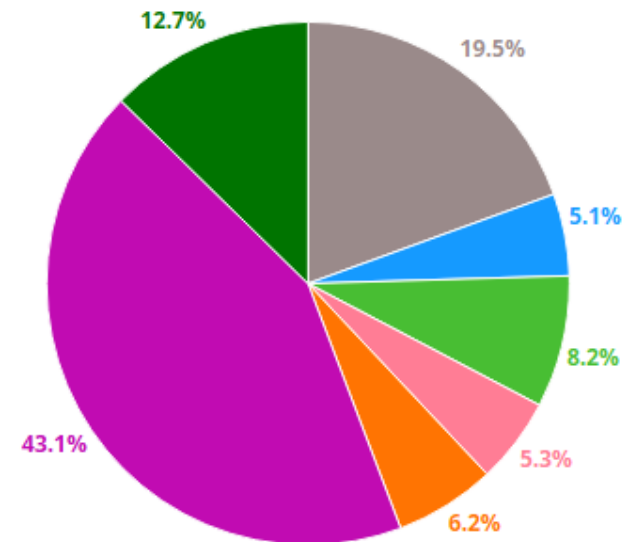
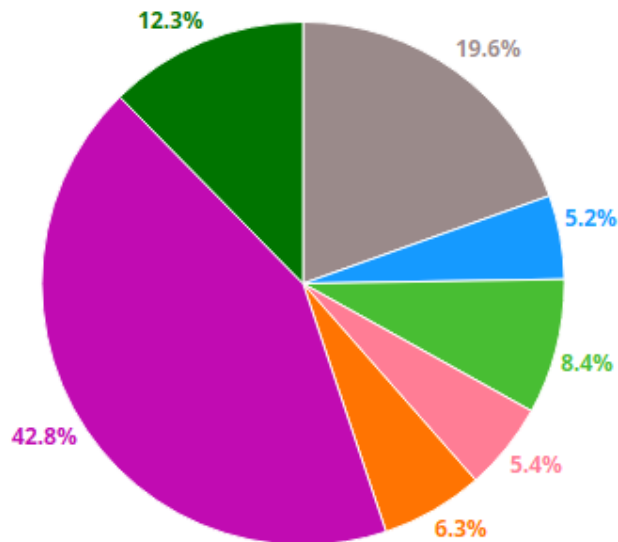
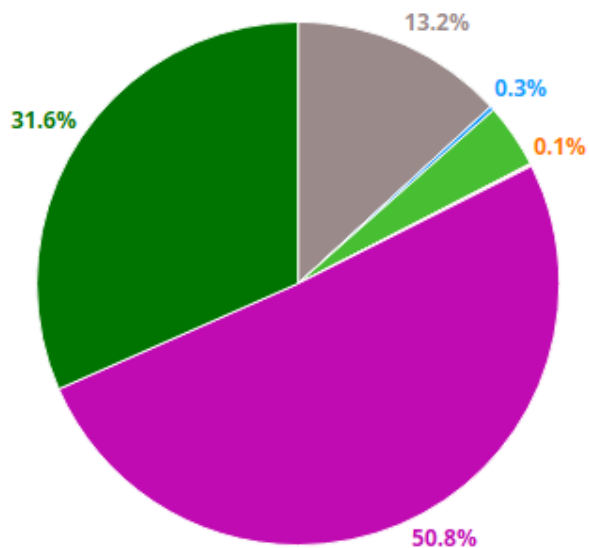
Total Visitor Spend in CWQ LGAs by Visitor Type Share (2019)



Domestic Day

Domestic Overnight

International



All Visitation by Motivation by LGA (2019)

Barcaldine

Barcoo

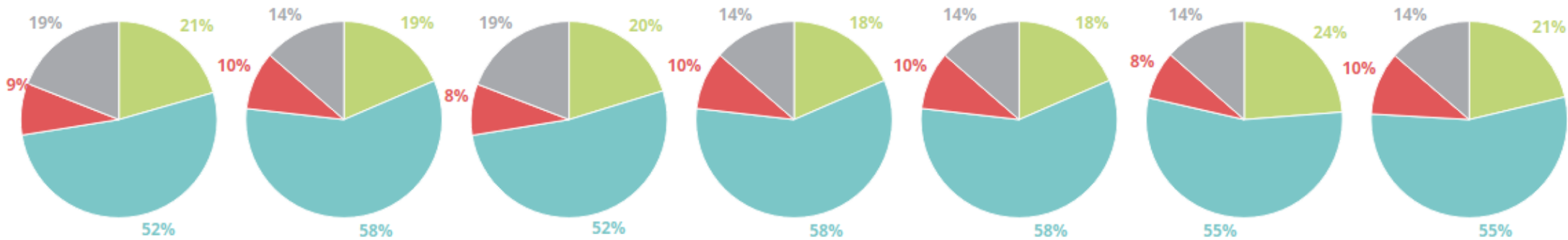
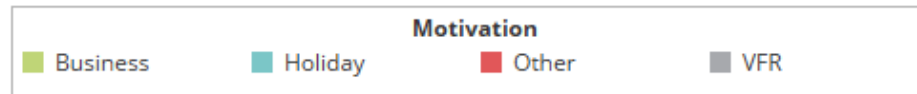
Blackall-Tambo

Boulia

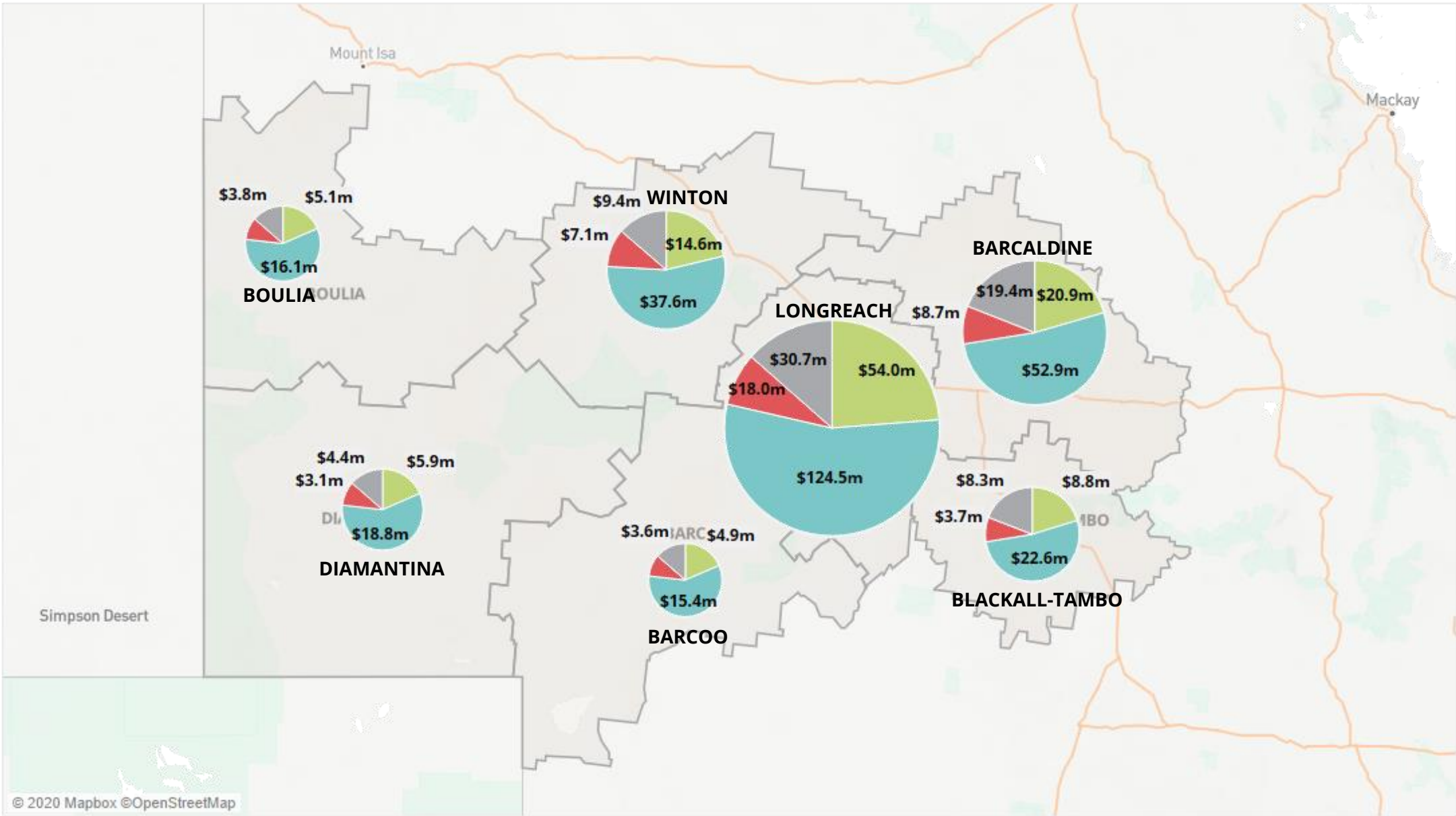
Diamantina

Longreach

Winton

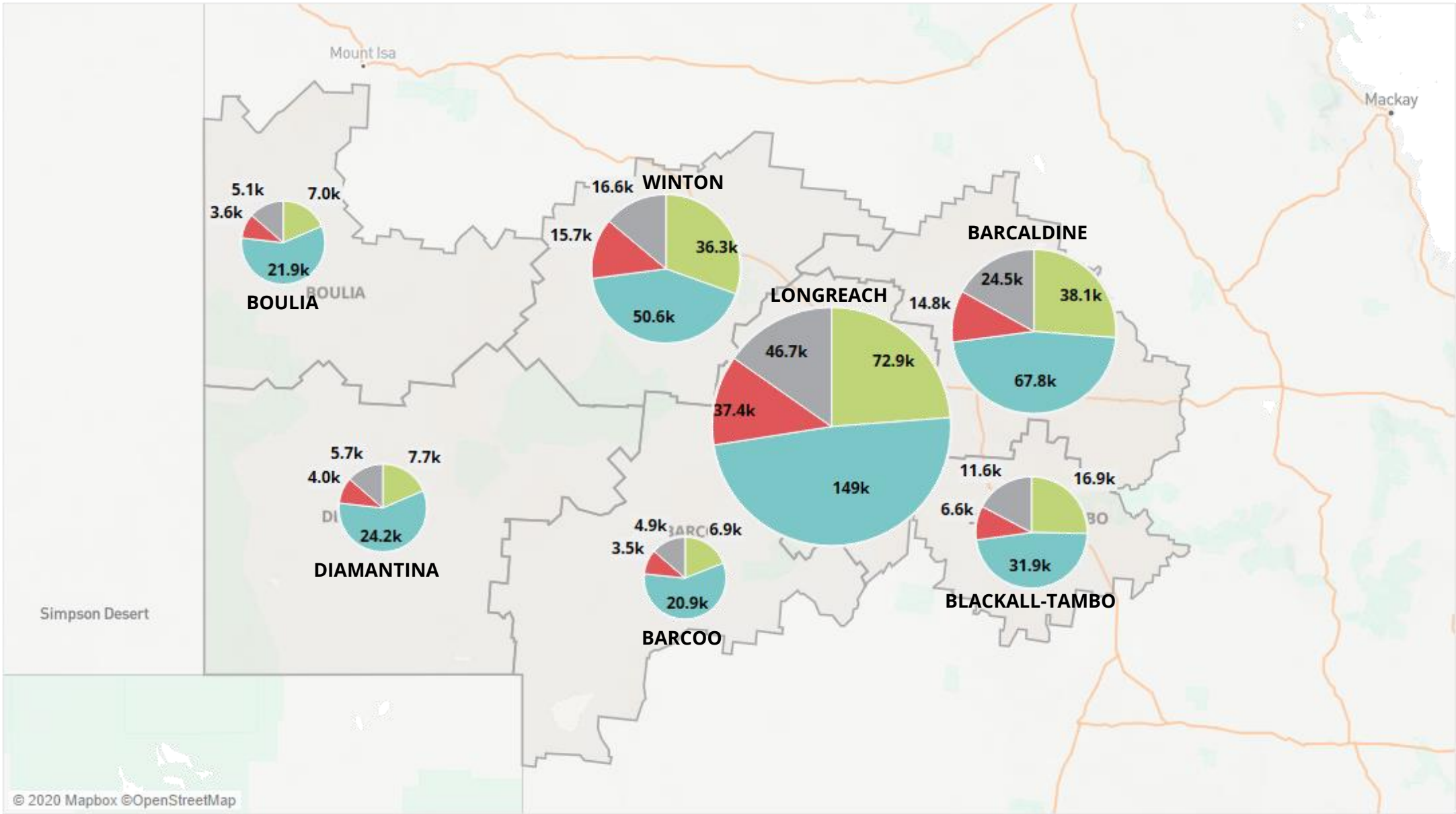


All Spend by Motivation by LGA (2019)



© 2020 Mapbox ©OpenStreetMap

All Visitation by Motivation by LGA (2019)



© 2020 Mapbox ©OpenStreetMap



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 been developed in Excel to enable the data coordinator/contractor to continue to update the audit as new product is added or deleted.

The audit results have been displayed in two ways:

- Google My Maps which enable any one with the link to view a live feed and product within the region; and
- Dashboards which are contained within Excel and can be exported to PDF in the same way the LGA visitor Dashboards can be.

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 such as about-australia.com.au and planbooktravel.com.au.**



Overview

Google My Maps will enable any one with the web link to access the full product audit. The filters have been designed to allow users to view data according to product type and LGA.

The following figures demonstrate the various keys/filters which can be applied in Google My Maps. They align with the categorisation available in the Dashboards.

It is important to note that more than one filter can be applied at each time and when a user selects an individual attraction or accommodation property, additional information on that marker is displayed.

The figures which follow on the following four pages provide screenshots of the maps with the various filters applied. Users can zoom in to view areas in more detail.

A note on destination events

As outlined previously, 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.

As new destination events are developed, they can be added to the events database and Google My Maps.

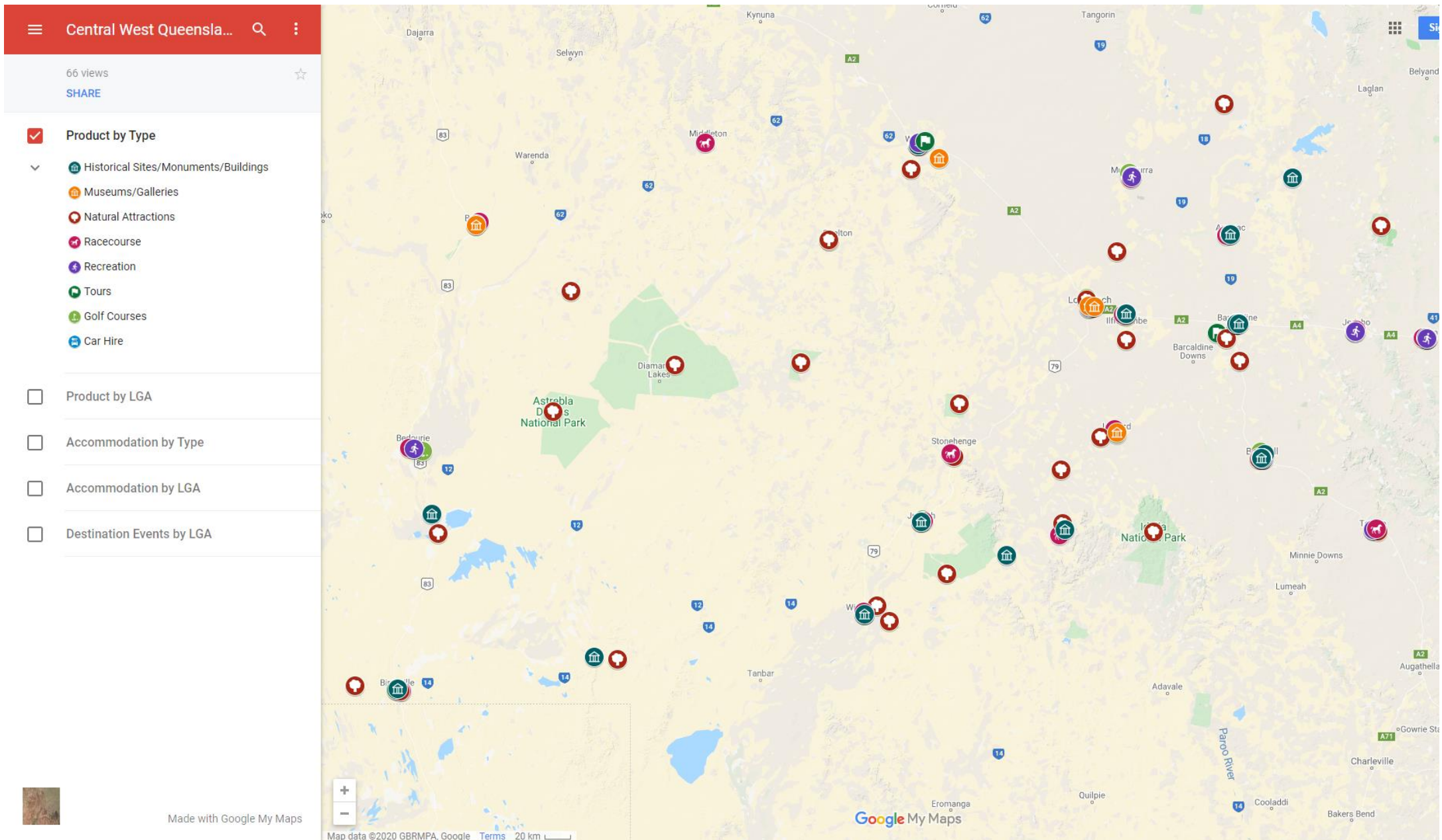
Filters able to be applied in My Maps

<p><input checked="" type="checkbox"/> Product by Type</p> <ul style="list-style-type: none"> <input type="checkbox"/> Historical Sites/Monuments/Buildings <input type="checkbox"/> Museums/Galleries <input type="checkbox"/> Natural Attractions <input type="checkbox"/> Racecourse <input type="checkbox"/> Recreation <input type="checkbox"/> Tours <input type="checkbox"/> Golf Courses <input type="checkbox"/> Car Hire <p><input checked="" type="checkbox"/> Product by LGA</p> <ul style="list-style-type: none"> <input type="checkbox"/> Barcaldine <input type="checkbox"/> Longreach <input type="checkbox"/> Blackall-Tambo <input type="checkbox"/> Barcoo <input type="checkbox"/> Diamantina <input type="checkbox"/> Winton <input type="checkbox"/> Boulia 	<p><input checked="" type="checkbox"/> Accommodation by Type</p> <ul style="list-style-type: none"> <input type="checkbox"/> Campgrounds <input type="checkbox"/> Hotel/Motel <input type="checkbox"/> Caravan Park <input type="checkbox"/> Home Rentals/Self Contained/Airbnb <input type="checkbox"/> Pub accommodation <input type="checkbox"/> Backpackers/Hostel <input type="checkbox"/> Station <p><input checked="" type="checkbox"/> Accommodation by LGA</p> <ul style="list-style-type: none"> <input type="checkbox"/> Barcaldine <input type="checkbox"/> Longreach <input type="checkbox"/> Winton <input type="checkbox"/> Blackall-Tambo <input type="checkbox"/> Barcoo <input type="checkbox"/> Diamantina <input type="checkbox"/> Boulia 	<p><input checked="" type="checkbox"/> Destination Events by LGA</p> <ul style="list-style-type: none"> <input type="checkbox"/> Diamantina <input type="checkbox"/> Winton <input type="checkbox"/> Blackall-Tambo <input type="checkbox"/> Boulia <input type="checkbox"/> Longreach
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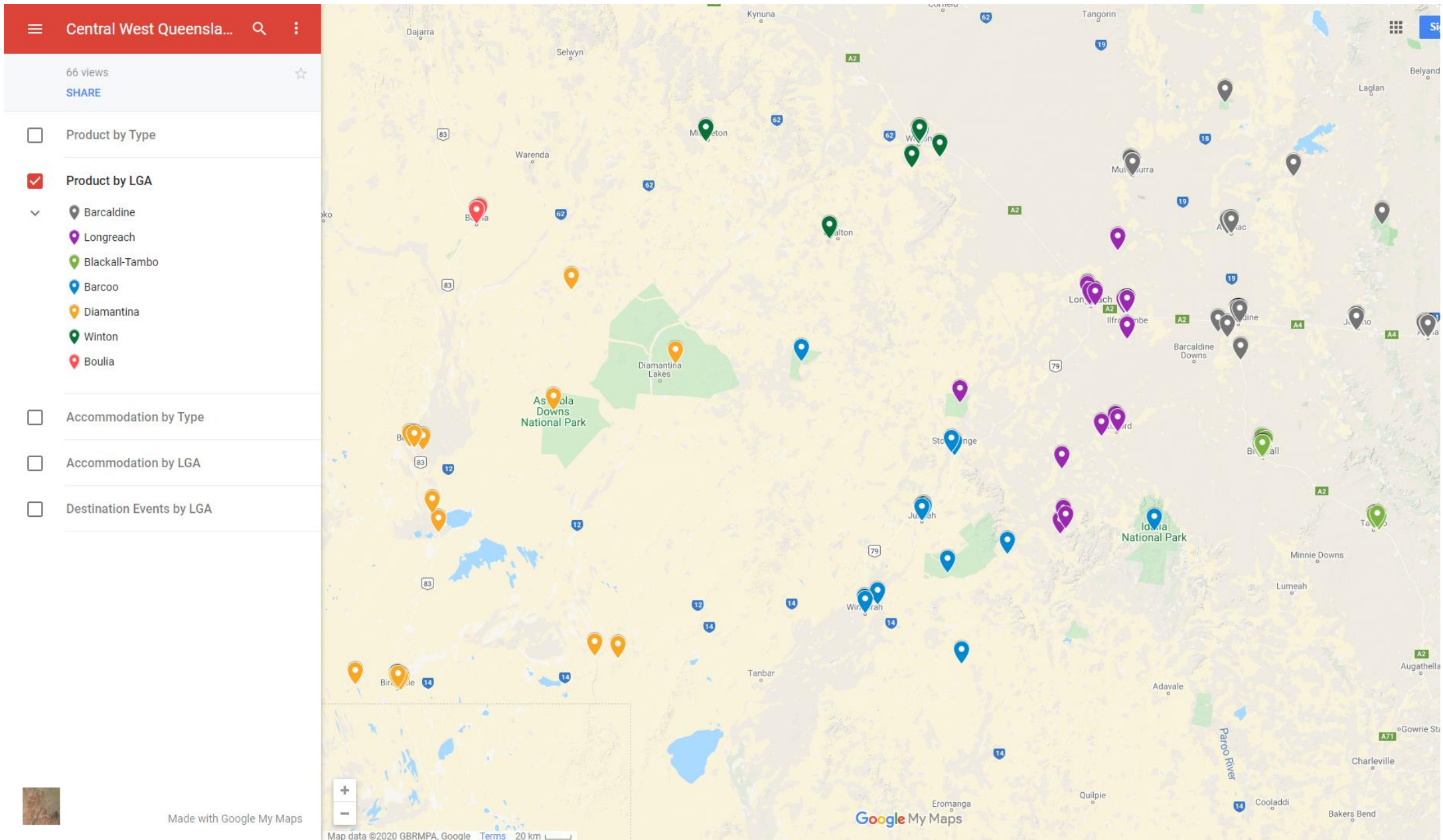
Additional information displayed on marker selection

<p>← Australian Age of Dinosaurs</p>	<p>← Birdsville Caravan Park</p>	<p>← Birdsville Races</p>
<p>Name Australian Age of Dinosaurs</p> <p>Major Type Attractions</p> <p>Subtype Museums/Galleries</p> <p>Free or Pa Paid</p> <p>Latitude -22.4790908</p> <p>Longitude 143.1827148</p> <p>SA2 Far Central West</p> <p>LGA Name Winton</p>	<p>Name Birdsville Caravan Park</p> <p>Major Type Accommodation</p> <p>Type Caravan Park</p> <p>Subtype Caravan Park</p> <p>Free or Pa Paid</p> <p>Latitude -25.8996206</p> <p>Longitude 139.354453</p> <p>Rooms 12</p> <p>Sites 50</p> <p>SA2 Far Central West</p> <p>LGA Name Diamantina</p>	<p>name Birdsville Races</p> <p>Primary LGA Diamantina</p> <p>Month September</p> <p>Occurance Annually</p>

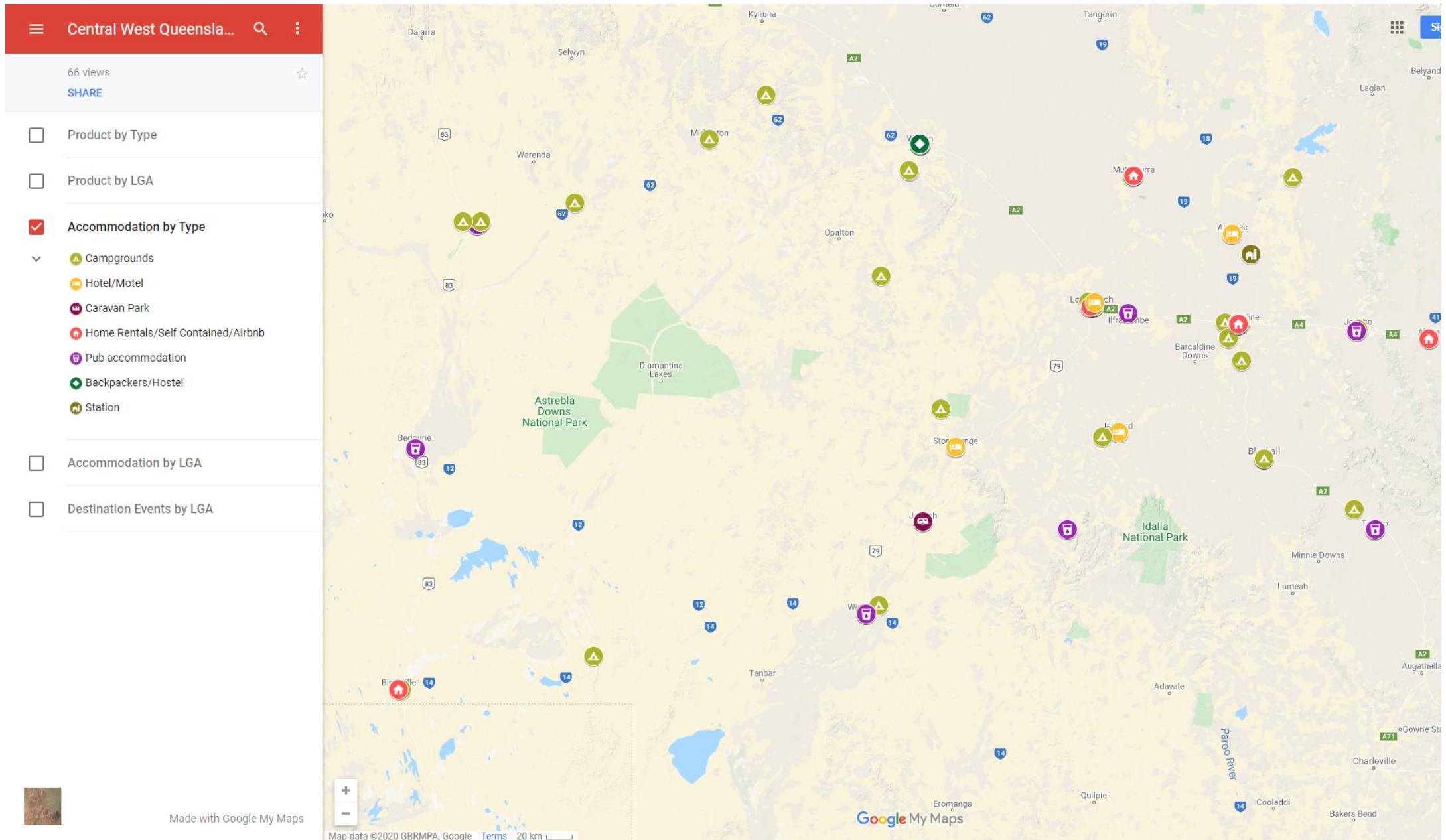
Attractions/Services Audit by Type (Google My Maps)



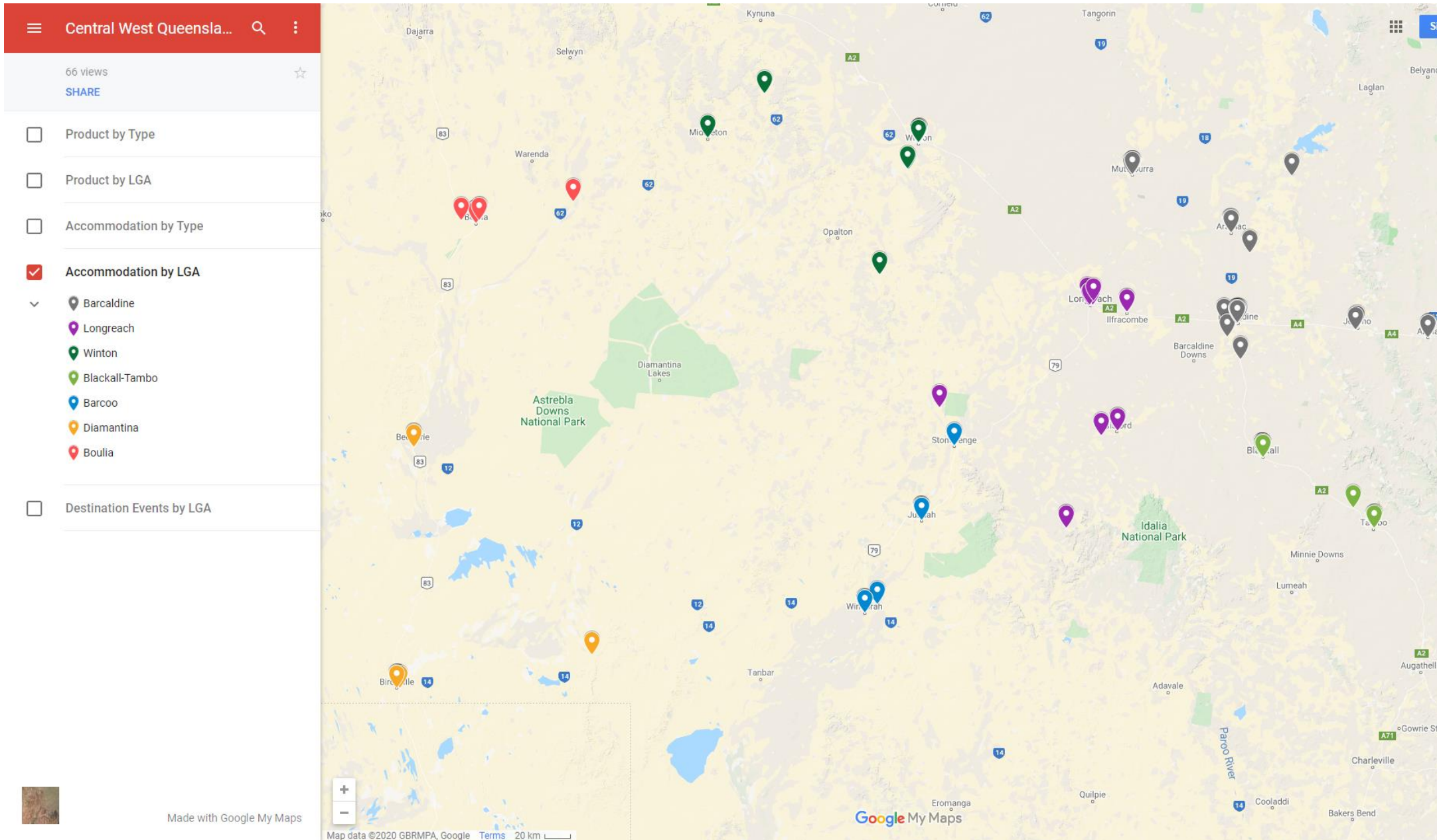
Attractions/Services Audit by LGA (Google My Maps)



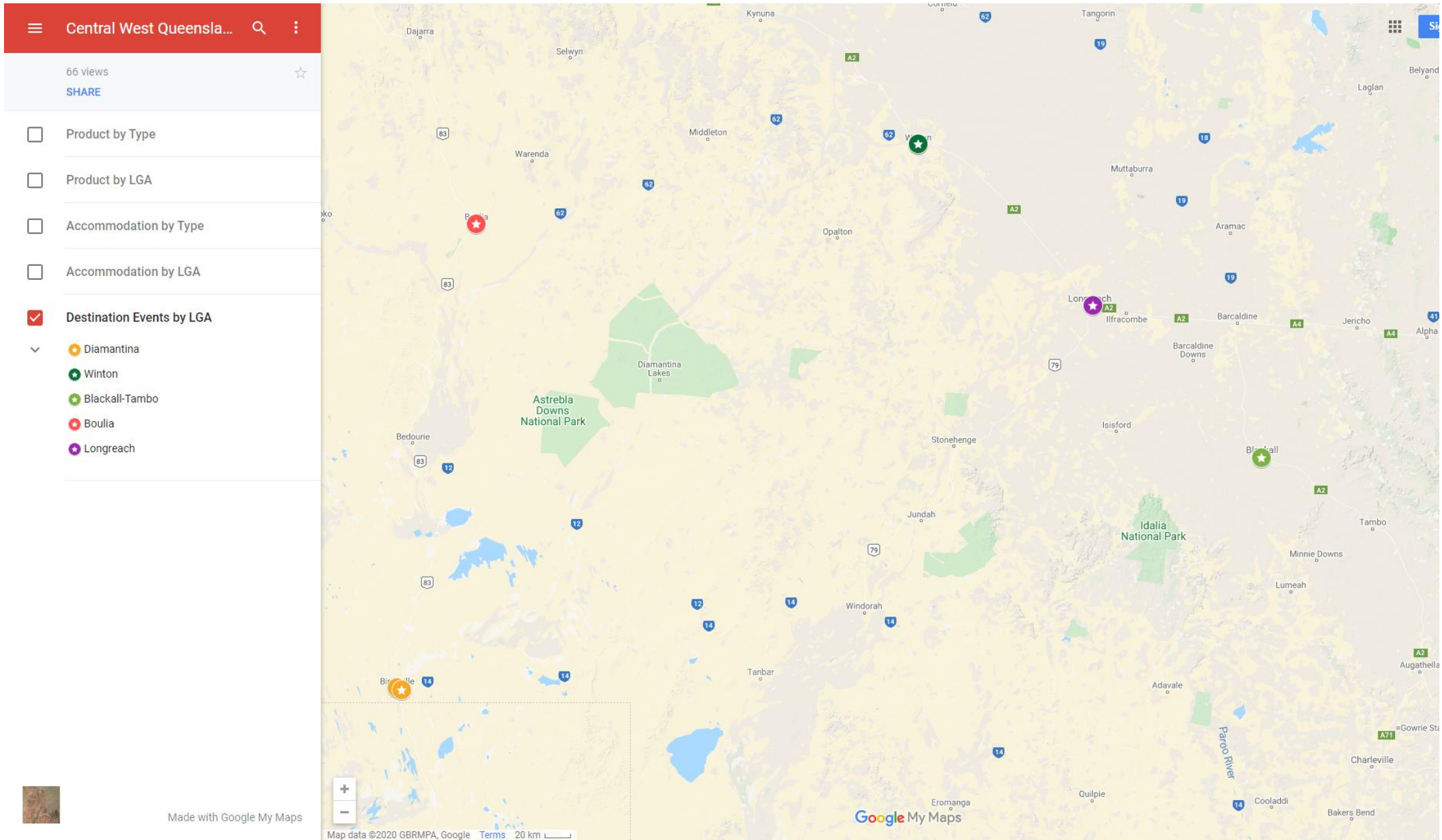
Accommodation Audit by Type (Google My Maps)



Accommodation Audit by LGA (Google My Maps)



Event Audit by LGA (Google My Maps)



Overview

In addition to the Google My Maps created as part of this project, two Dashboards have also been developed to display a more detailed summary of the type of product available.

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, including being able to display this by attraction type and by free versus paid product; and
- a breakdown of the products available in each LGA.

When new accommodation and attractions are added or are deleted within the audit databases and the applicable steps followed, the Dashboard will automatically display new data.

The Dashboards also contain an inbuilt macro which enables the data coordinator /contractor to save the Dashboard as a PDF to enable any updated data to be provided to each Council and its relevant stakeholders.

The following two pages provide screenshots of the accommodation and attractions/product Dashboards.

Destination events have not been included in a Dashboard because there are a limited number of these.



All Central West Queensland LGAs

> ACCOMMODATION AUDIT DASHBOARD



[Click here](#) for a dynamic map of accommodation & attractions within the CWQ region

1. Accommodation Summary by LGA (number of properties, rooms and powered & unpowered sites)

Select to filter table by LGA and/or by property type. To display all LGAs or property types, click clear filter button.

Purple shading indicates filter is selected.

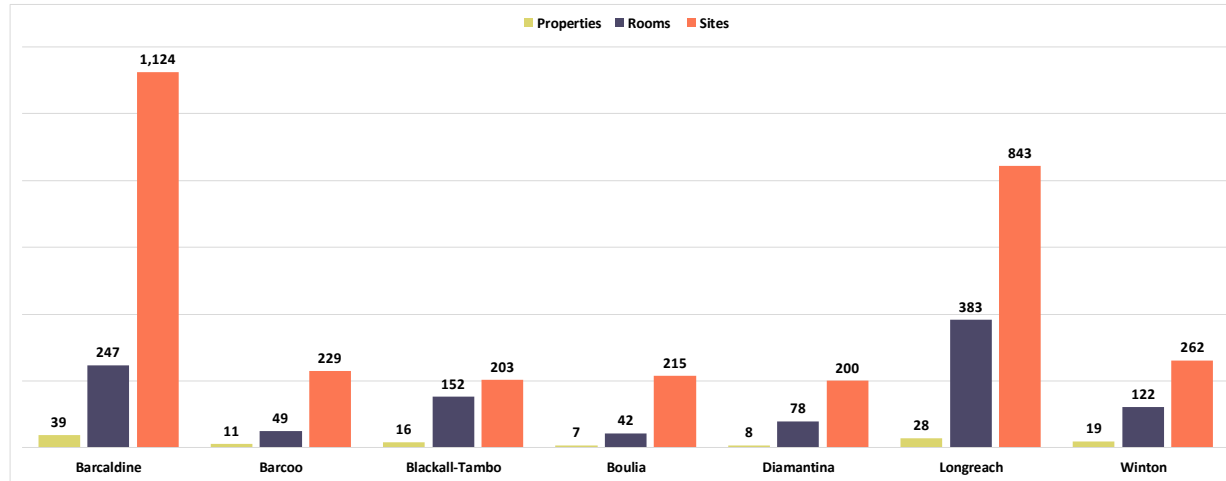
LGA Name ☰ 🗑️

Barcaldine	Barcoo	Blackall-Tambo	Boullia	Diamantina	Longreach	Winton
------------	--------	----------------	---------	------------	-----------	--------

Accommodation Type ☰ 🗑️

Backpackers/...	Campgrounds	Caravan Park	Home Rentals...	Hotel/Motel	Pub accommo...	Station
-----------------	-------------	--------------	-----------------	-------------	----------------	---------

LGA	Properties	% of Properties	Rooms	% of Rooms	Sites	% of Sites
Barcaldine	39	30%	247	23%	1,124	37%
Barcoo	11	9%	49	4.6%	229	7%
Blackall-Tambo	16	13%	152	14%	203	7%
Boullia	7	5%	42	3.9%	215	7%
Diamantina	8	6%	78	7%	200	7%
Longreach	28	22%	383	36%	843	27%
Winton	19	15%	122	11%	262	9%
Total	128	100%	1,073	100%	3,076	100%



2. Accommodation Summary by Property Type (number of properties, rooms and powered & unpowered sites)

Select to filter table by LGA and/or by property type. To display all LGAs or property types, click clear filter button.

Purple shading indicates filter is selected.

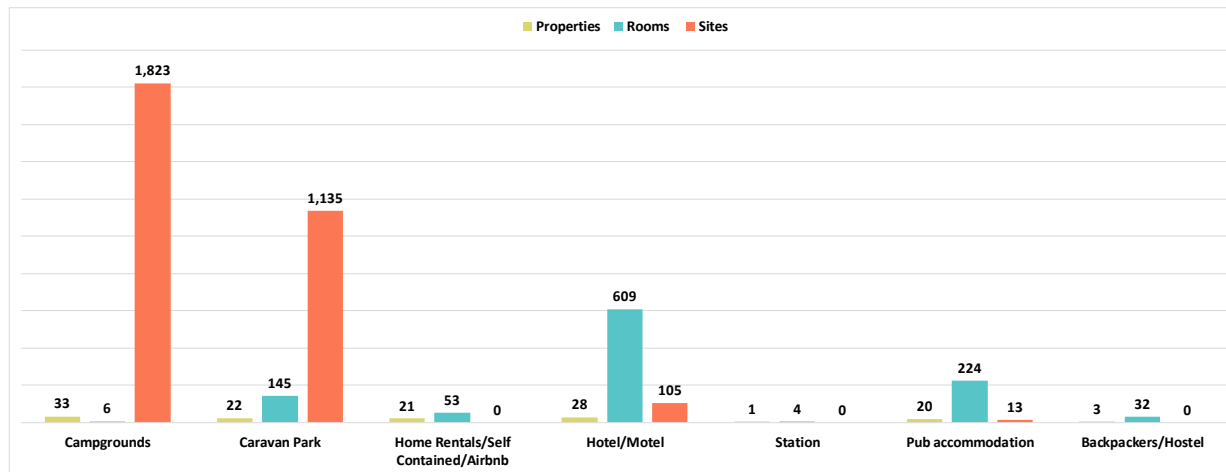
LGA Name ☰ 🗑️

Barcaldine	Barcoo	Blackall-Tambo	Boullia	Diamantina	Longreach	Winton
------------	--------	----------------	---------	------------	-----------	--------

Accommodation Type ☰ 🗑️

Backpackers/...	Campgrounds	Caravan Park	Home Rentals...	Hotel/Motel	Pub accommo...	Station
-----------------	-------------	--------------	-----------------	-------------	----------------	---------

LGA	Properties	% of Properties	Rooms	% of Rooms	Sites	% of Sites
Campgrounds	33	26%	6	0.6%	1,823	59%
Caravan Park	22	17%	145	14%	1,135	37%
Home Rentals/Se	21	16%	53	4.9%	0	0.0%
Hotel/Motel	28	22%	609	57%	105	3.4%
Station	1	0.8%	4	0.4%	0	0.0%
Pub accommoda	20	16%	224	21%	13	0.4%
Backpackers/Hostel	3	2.3%	32	3.0%	0	0.0%
Total	128	100%	1,073	100%	3,076	100%



All Central West Queensland LGAs

> ATTRACTIONS AUDIT DASHBOARD



[Click here](#) for a dynamic map of accommodation & attractions within the CWQ region

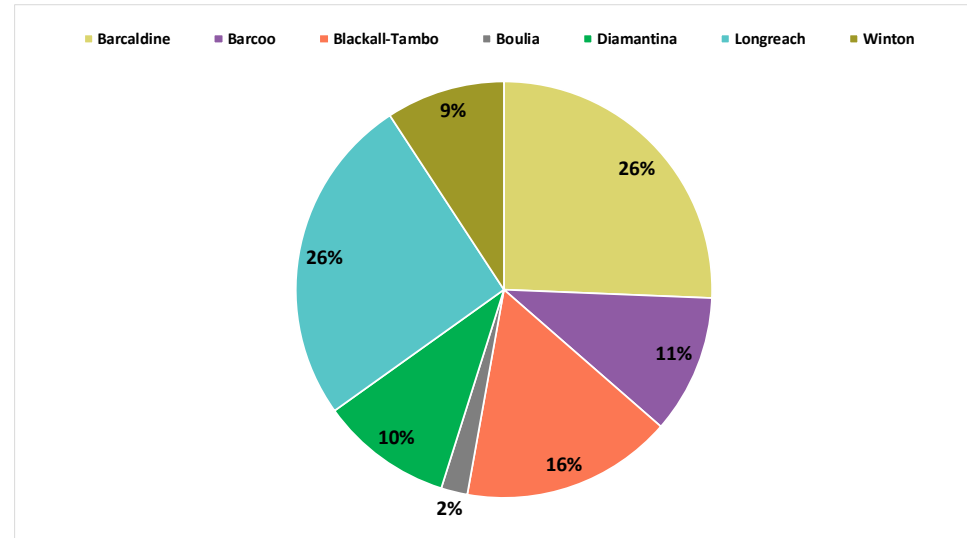
1. Attraction Summary by LGA

Select to filter table by attraction type and free versus paid product. To display all types, click clear filter button.

Purple shading indicates filter is selected.

Attraction Type				Free or Paid Product	
Golf Courses	Historical Sites/Monuments...	Museums/Galleries	Natural Attractions	Free	Paid
Racecourse	Recreation	Services	Tours		

LGA	#
Barcaldine	50
Barcoo	21
Blackall-Tambo	32
Boulia	4
Diamantina	20
Longreach	50
Winton	18
Total	195



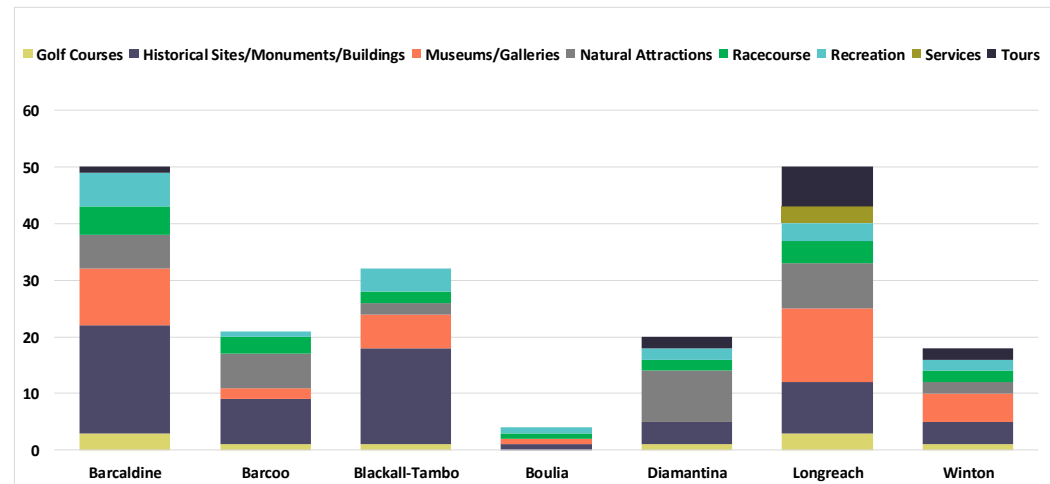
2. Attraction Summary by Attraction Type

Select to filter table by LGA. To display all LGAs, click clear filter button.

Purple shading indicates filter is selected.

LGA Name							
Barcaldine	Barcoo	Blackall-Tambo	Boulia	Diamantina	Longreach	Winton	

	Golf Courses	Historical Sites/Monuments	Museums/Galleries	Natural Attractions	Racecourse	Recreation	Services	Tours
Barcaldine	3	19	10	6	5	6	0	1
Barcoo	1	8	2	6	3	1	0	0
Blackall-Tambo	1	17	6	2	2	4	0	0
Boulia	0	1	1	0	1	1	0	0
Diamantina	1	4	0	9	2	2	0	2
Longreach	3	9	13	8	4	3	3	7
Winton	1	4	5	2	2	2	0	2
Total	10	62	37	33	19	19	3	12



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.

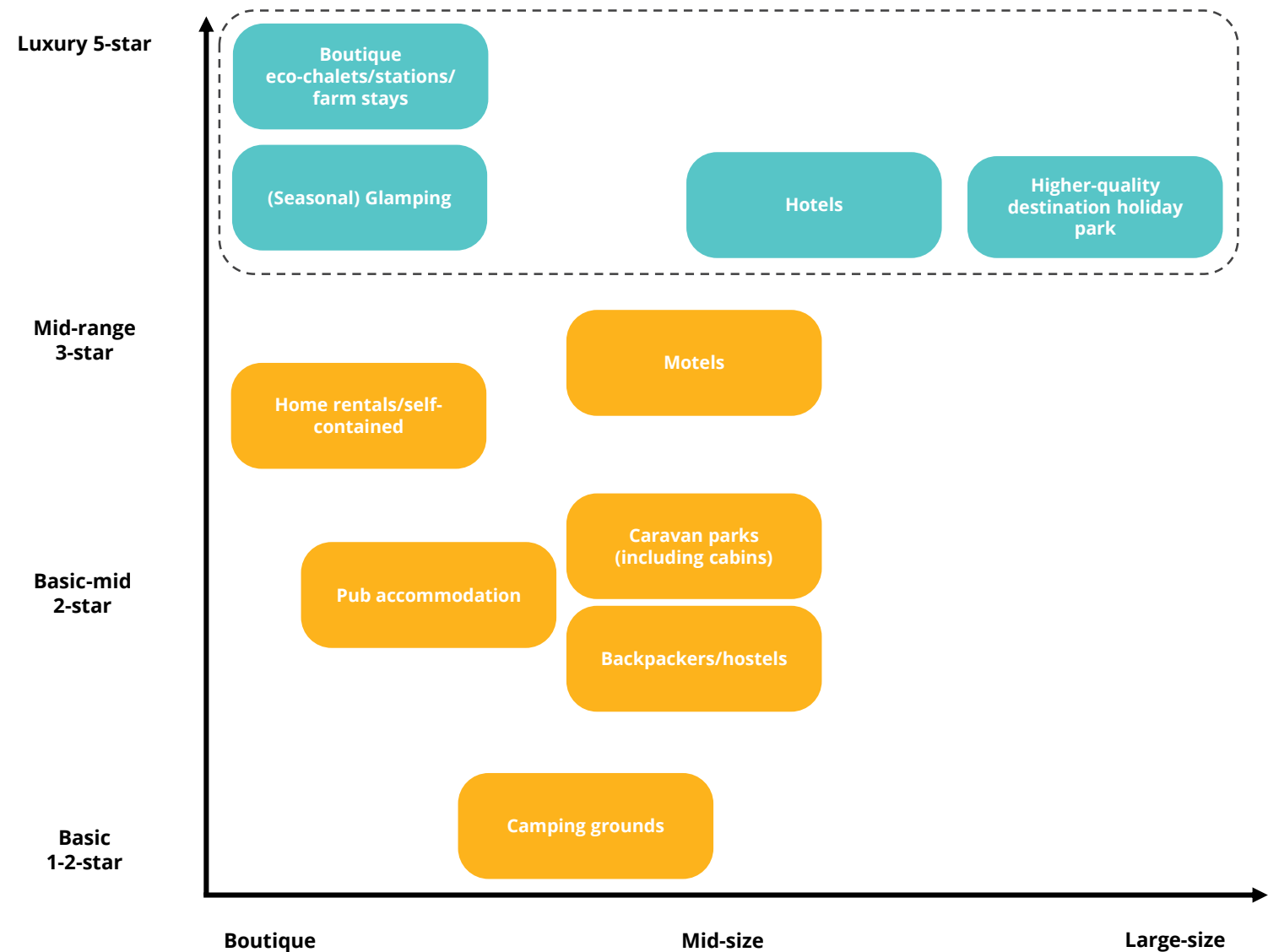
KEY



Current Stock



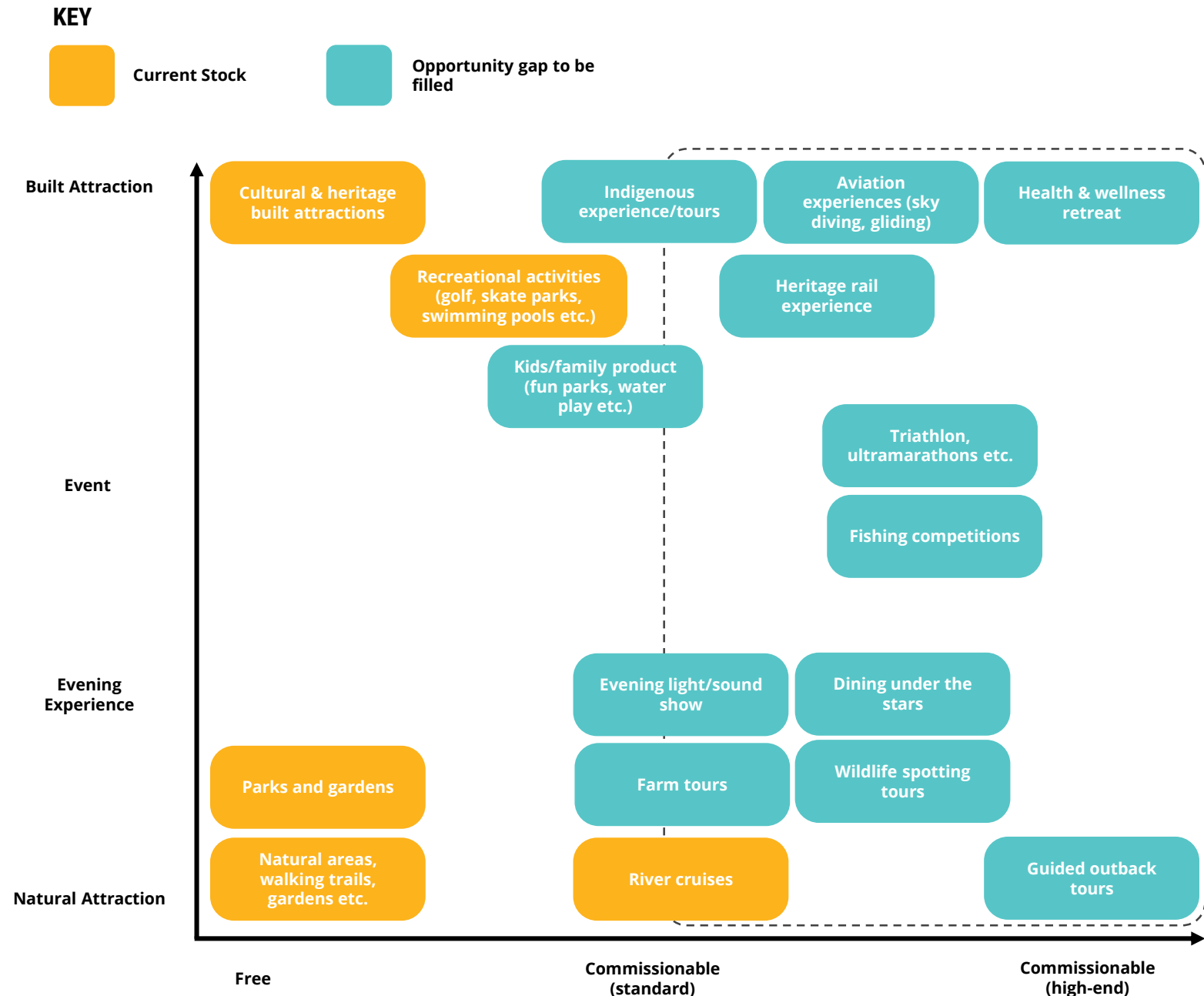
Opportunity gap to be filled



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

GAPS TO FILL (AND HOW) GOING 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 provided.

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 provided.

It is important that all occupancy data is kept strictly confidential and any data to be 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 the 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.





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