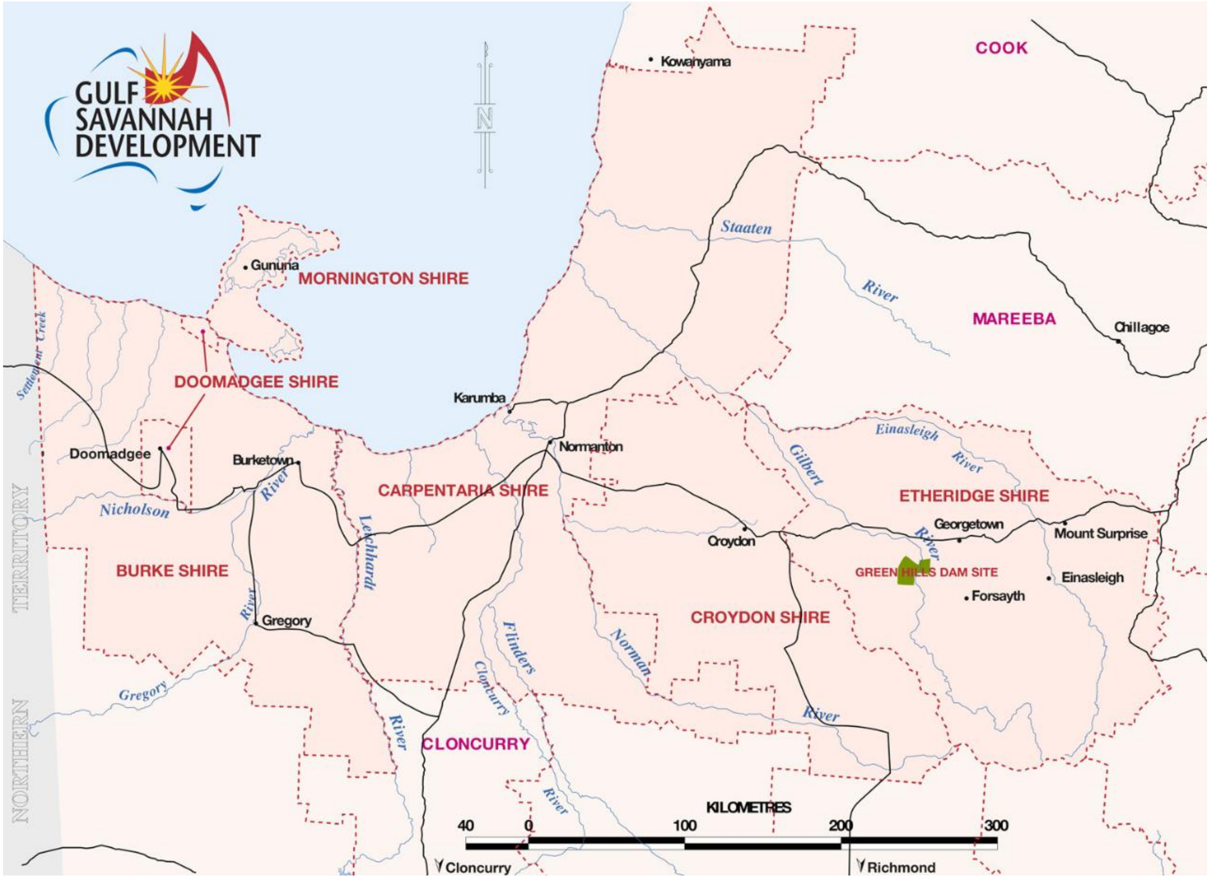
GULF SAVANNAH DEVELOPMENT

Tourism Survey Report

March 2018



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Queensland Government

CONTENTS

LIST OF CHARTS & TABLES

INTRODUCTION

Tourism is an important industry for the Gulf Savannah Region. Nevertheless, accessing reliable data on this region is reasonably difficult to source. Standard reports from Tourism Research Australia (TRA) do not drill down to the level required, while Australian Bureau of Statistics (ABS) surveys such as the Tourism Accommodation Survey do not cover the majority of accommodation businesses operating in the Gulf (those with less than 15 units of accommodation).

> **This information deficit compromises the capacity of key stakeholders in the industry to confidently plan and invest.**

GSD and Savannah Way recognised this issue in 2012, undertaking a major tourism survey. The results of this survey were augmented by a Tourism Profile produced by the Queensland Office of Economic and Social Research (QOESR).

While the 2018 GSD Tourism Survey Report aims to replicate the 2013 Report in many respects, there are a few differences. These include:

- Provision of trend data from Calendar Year (CY) 2012 to September 2017 for National Visitor Survey data and International Visitor Survey data;
- Provision of traffic count data for State-controlled road networks in/around the Gulf Savannah region;
- Addition and subtraction of a range of questions:
    - Removed: questions related to drive tourists seeking employments opportunities;
    - Added: questions related to tourism and the digital world.
- Circulation of survey to tourism accommodation providers on:
    - Accommodation and occupancy rates; and
    - Digital capability.
- Inclusion of "Top 5" snapshots from TripAdvisor, the most popular source of information for those travelling to the Gulf.

METHODOLOGY

The project began with a review of the 2012 survey and 2013 GSD Tourism Survey Report. This report blends insights gained from a GSD-issued survey with data available from the Australian Bureau of Statistics and Tourism Research Australia.

THE SURVEY: TO REPLICATE OR REVISE?

QGSO: feedback on the questions from the Queensland Government Statistician's Office suggested that there were a number of ways in which the original survey could be improved. The main observations related to the likely benefits of reducing the number/complexity of the questions.

> Response: in order to create a basis for comparison between the 2012 and 2017 surveys, we deemed it necessary to replicate the majority of the questions and were only able to take on board some of the QGSO feedback.

NEW DEVELOPMENTS: a considerable portion of the previous survey was directed toward "work-travel", while no questions were geared toward distilling the ways in which "the digital" influenced tourist behaviour.

> Response: all questions related to "work-travel" were cut, while 3 questions on the influence of "the digital" were introduced.

AUGMENTING THE SURVEY:

The 2018 GSD Tourism Survey also incorporates data from the ABS and TRA. Given, the time lag between the 2012 Survey (and 2013 Report), it is possible to present the ABS/TRA data as trend data, which should provide stakeholders with an opportunity to better interrogate the data presented.

TOURISM RESEARCH AUSTRALIA: data from the National Visitor Survey and from the International Visitor Survey
AUSTRALIAN BUREAU OF STATISTICS: data sets incorporated come from Census Data, Regional Profiles, and Tourism Accommodation (15+ rooms).

OTHER DATA SOURCES USED IN THIS SURVEY INCLUDE:

DEPARTMENT OF TRANSPORT AND MAIN ROADS: annual average daily traffic data on State-controlled roads in North West Queensland.

GULF SAVANNAH DEVELOPMENT: GSD issued a number of surveys at the same time as undertaking the Gulf Tourism Survey. These included business-directed surveys on digital communications and platforms and an accommodation provider-directed survey on room occupancy trends.

CARAVAN INDUSTRY OF AUSTRALIA: this report benefits from some high-level statistics sourced from Caravan Industry of Australia publications and CaravanStats. However, like much other data available, it is difficult to find statistical coverage below the State level.

ISSUES

While each of the above sources of information help paint a picture of the patterns and trends of tourism in the Gulf Savannah region, each source has its particular pitfalls. These include:

- SAMPLE SIZE:
    - The smaller the sample, the lower the predictive value. TRA and ABS data becomes less useful the further one drills down into it as the sample sizes become increasingly small. As sample size and predictive value are inversely correlated, this data set often
- SURVEY PARAMETERS:
    - In the ABS Tourism Accommodation Survey, for example, we are provided with data for accommodation providers with 15+ rooms. This parameter captures four tourism accommodation providers in the Gulf Savannah region. Three of these are based in Carpentaria SLA and one in Croydon-Etheridge SLA. The data for the latter is omitted in consequence of there being a sample size of one.
    - The ABS has no survey that covers caravan parks.

SURVEY NUMBERS:

- 307 surveys were completed, with each survey representing approximately 3.45 respondents for a total of approximately 1,060 visitors surveyed.
- This figure represents a reduction in the number of surveys/visitors captured by the 2012 survey, though the resourcing allocated to the 2017 survey was a shadow of that allocated to the 2012 survey.

KEY FINDINGS

TOTAL NUMBER VISITING THE GULF**:** the 2012 survey indicated that there were approximately 58,000 leisure visitors to the Gulf. 2017 survey data, coupled with rolling IVS and NVS averages over a six-year period, suggest that there were approximately 53,150 leisure visitors to the Gulf Savannah region in 2017.

AVERAGE LENGTH OF STAY**:** the 2012 survey indicated an average length of stay of 11.5 days as compared with the 2017 survey of 13.98 days. NVS data suggests an average length of stay of 12.3 nights in Croydon-Etheridge and 13.18 in Carpentaria. IVS data suggests an average length of stay of 14.21 in Croydon-Etheridge and 15.32 in Carpentaria.

AVERAGE EXPENDITURE**:** the 2012 survey indicated average per person per day expenditure of $79.11, while 2017 data indicates that this figure has increased to $94.02 per person per day.

TOTAL VALUE TO THE GULF**:** the 2013 GSD Tourism report estimated the total value of tourism to the Gulf Savannah region as $65m in 2012 compared with an estimate of $69.8m for 2017.

STATE OF ORIGIN**:** as with 2012, the majority of visitors to the region in 2017 were from Queensland. However, the number and proportion of visitors from Queensland in 2017 (63%) was far higher than in 2012 (36%). The National Visitor Survey data for 2012-2017 suggests between 60-80% of domestic visitors to the region were from Queensland.

COUNTRY OF ORIGIN: between 2012-2017, German and New Zealand tourists remained by far the most well represented nationalities among those visiting the Gulf for leisure.

AGE GROUP OF VISITORS: the 60+ age group remained the dominant age group represented in the Gulf. In 2012, this was 66% and in 2017, this was 59%. There was a doubling of the proportion of 40-49 year old persons travelling in the Gulf, with 6% in 2012 and 12% in 2017.

TYPE OF TRAVEL PARTY: couples remained the dominant travel party type between 2012 (59.0%) and 2017 (60.1%), though higher proportions of friends travelled together in 2017 (24.24%) than in 2012 (16.0%).

FIRST OR RETURN VISIT**:** the 2012 results (64% first time, 36% return) were almost the opposite of 2017 results (36% first time, 56% return). With the exception of 2013, International Visitor Survey data also suggests a higher proportion of return visitors than first time visitors. Unfortunately, this data is not captured for the National Visitor Survey.

MOST VISITED TOWN**:** in 2017, Georgetown (88%) replaced 2012 favourite Normanton (69%) as 'the most stopped in town'. 80% stopped in Karumba and Normanton, while 66% stopped in Mount Surprise. Burketown registered a significant increase in visitations between 2012 (22%) and 2017 (54%).

ACCOMMODATION TYPE**:** the 2017 survey indicates 69% of visitors stayed in commercial caravan parks and 24% stayed at free-camp sites. In 2012 the results were 57% in commercial caravan parks and 33% free-camp.

ENTRY & EXIT POINTS**:** in 2017, 38% of visitors to the Gulf entered via Cairns/Mt Garnet/Mt Surprise along the Gulf Developmental Road, followed by entry via Burke & Wills Roadhouse (34%). Exit points were similar, with 38% departing through Mt Surprise/Mt Garnet/Cairns and 15% through Burke & Wills.

VISITOR SATISFACTION**:** overall visitor satisfaction declined very slightly between 2012 (94%) and 2017 (96%). However, there was a significant decline in the proportion who were Very Satisfied in 2012 (74%) to the proportion who were Very Satisfied in 2017 (56%).

HIGHEST LEVELS OF SATISFACTION: the highest “Overall Satisfied” ratings were with the ‘friendliness of locals’ (89.06%), with feelings of ‘personal security and safety’ (86.16%) and the ‘variety of things to see and do’ (85.94%).

LOWEST LEVELS OF SATISFACTION: only 25.81% were “Overall Satisfied” with telecoms/internet/Wi-Fi in the region, which was down from 42.40% in 2012 despite significant investment into digital infrastructure in the Gulf Savannah region. This is likely due to continued connectivity/capability issues in key tourism sites such as Karumba, Undara Experience, Boodjamulla National Park, Adels Grove and so on.

There was also a significant decline in the overall satisfaction rating for Charters and Tours, with 94.2% in the Overall Satisfied group in 2012 versus 54.9% in 2017.

USE OF DIGITAL DEVICES WHILE TRAVELLING: 94.44% of visitors used smart phones while travelling, 50% used tablets and 40.74% used laptops.

REVIEWING HOLIDAYS/EXPERIENCES: 56.82% of visitors reviewed their experiences on Facebook, 34.09% on TripAdvisor and 11.36% on Instagram.

KEY RECOMMENDATIONS

DIGITAL INVESTMENT

RECOMMENDATION 1:

- Address issues with digital connectivity (broadband, Wi-Fi, 4G) in Karumba:
    - Progress the Normanton to Karumba Fibre Optic Project: this project is currently part-funded under the State of Queensland's Local Government Grants and Subsidies Project.
- Address issues with digital connectivity for key tourism sites (Undara, Adels Grove etc.)
    - Only 25.81% of those surveyed were "Overall Satisfied" with telecoms/internet/Wi-Fi in the region. This was down from ~40% in 2012.

RECOMMENDATION 2:

- Continue to fund/lobby for Improvements to the digital capability of the Gulf Savannah region, including the development of mobile-enabled booking and transaction sites for tours, events and accommodation:
    - 94.44% of visitors in 2017 used smart phones while travelling;
    - Refer to recommendations in the Gulf Savannah Digital Transformation Strategy.

NEW PRODUCT OFFERINGS

RECOMMENDATION 3:

- Improve product offerings in National Parks, World Heritage Sites
    - To increase and retain market share, the Gulf Savannah region needs to improve its product offering in National Parks (e.g. Boodjamulla, Finucane Island) and World Heritage Sites (Riversleigh Fossil Fields).
        - Lobby the Australian and State Government to develop masterplans for key sites within the region;
        - Lobby the State Government to enable commercial activities to be run in National Parks.

RECOMMENDATION 4:

- Enable and promote the development of Indigenous tourism businesses and products
    - Through innovative land tenure arrangements and the licensing of the Visitor Information Centre to an Indigenous tourism operator, Burketown's visitation rate and revenue from tourism increased substantially during 2017.
- Develop Cattle Station Tours/Farm Stay opportunities across the region
    - Respondents to the 2012 Survey identified Cattle Station Tours (53.85%) and Farm Stays (45.95%) as the tourism products they would be most interested in experiencing.
- Develop new "Mineral Baths/Thermal Springs" experiences
    - Respondents to the 2017 Survey identified Mineral Bath experiences as a tourism product they would be "very interested in" accessing.

MARKETING

RECOMMENDATION 5:

- Develop a marketing and promotion strategy for the region to encourage new and return visitations:
    - No coordinated marketing and promotion strategy for the region currently exists, leading to a large data, information and knowledge gap with regard to expenditure, distribution and impact of marketing and promotions activity.
- Develop additional marketing and promotional content for the region

STATE OF ORIGIN:

RECOMMENDATION 6:

- Improve marketing to encourage increased interstate visitation:
    - Between 2012-2017, Queensland visitors have continued to dominate the tourism market in the Gulf Savannah region. Opportunities to grow interstate visitation should be considered.

COUNTRY OF ORIGIN:

RECOMMENDATION 7:

- Improve marketing to encourage increased international visitation
    - Germany and New Zealand have consistently dominated the Country of Origin visitor numbers for the Gulf in the International Visitor Survey from 2012-2017.
        - Identify the reasons for this popularity
        - Develop marketing strategy to increase numbers from these countries and from countries with similar tourism consumption habits.

LOCAL GOVERNMENT TOURISM-INFRASTRUCTURE PROJECTS

RECOMMENDATION 8:

- Local governments to re-conceptualise the delivery of major tourism projects by focusing on the delivery of tourism products rather than infrastructure projects.
    - Incorporate product development and marketing/branding into the earliest stages of project planning.

STAKEHOLDER COORDINATION

RECOMMENDATION 9:

- Improve coordination between key stakeholders (TTNQ, Savannah Way Limited, GSD, ADBT) to accelerate regional tourism planning and marketing and ensure adequate representation of the Gulf Savannah region with TTNQ jurisdiction.

ADDRESSING INFORMATION GAPS

RECOMMENDATION 10:

- Lobby relevant State and Federal stakeholders to encourage the ABS to fund the collection of key data sets not currently collected:
    - The Gulf Savannah tourism survey is necessary to address information gaps for the Gulf Savannah region in the following areas: occupancy rates for accommodation providers with <15 rooms and occupancy rates for caravan parks/camp sites.
- Develop a Data Sharing Agreement/MOU between GSD, local government, Visitor Information Centres, businesses and other entities to close this data gap.

WHAT IS THE TOTAL NUMBER OF VISITORS TO THE GULF?

2013 GSD REPORT

In the 2013 GSD Tourism report, there were an estimated 67,000 visitors to the Gulf Savannah. This was broken down into those travelling for leisure (Holiday + Visiting friends and relatives) and those travelling for business. The results were that:

- Approximately 58,000 visitors came for the purpose of holiday or leisure, of whom around 4,000 primarily came to visit friends and relatives.
- Another 9,000 came for the purpose of employment or business, although there was a high level of repeat visitation among that group.

With holiday/leisure as the focus (i.e. business not included), a survey of Karumba accommodation houses suggested ~34,600 visitors stayed in Karumba, with 62.1% of all visitors surveyed making their way to Karumba. Working with these key figures, an estimated total visitation figure for the Gulf Savannah in 2012 was derived: 57,971.

2018 GSD REPORT

The 2017 Survey did not collate as much Karumba-specific data as the 2012 Survey and so estimates have been based on a combination of fixed and rolling averages from IVS and NVS data sets (2012-2017) as well as the 2017 survey questions on town visitation and expenditure, which indicated 80% of visitors surveyed travelled to Karumba and 80% travelled through Georgetown.

Based on the above, we estimate that:

- Approximately 53,159 visitors came for the purpose of holiday or leisure, of whom around 3,660 primarily came to visit friends and relatives.
- Approximately 13,758 came for the purpose of employment or business. As with the 2013 Report, many of these were repeat visitations.

HOW LONG DID THEY STAY?

2013 GSD REPORT

The 2013 GSD Tourism report estimated that each visitor stayed, on average, 11.5 days.

2018 GSD REPORT

The 2018 GSD Tourism report, basing its estimate on Survey data and 2012-2017 IVS and NVS rolling averages for length of stay, suggests an average visitation length for leisure visitors of 13.98 days.

HOW MUCH IS THE TOURISM INDUSTRY WORTH?

2013 GSD REPORT

The 2013 GSD Tourism Report estimates the total value of tourism to the region as $65m in 2012. This was based on the number of visitors (58,000), average length of stay (11.5 days) and the average expenditure per day of leisure visitors ($79.11). Air services were not included in these calculations.

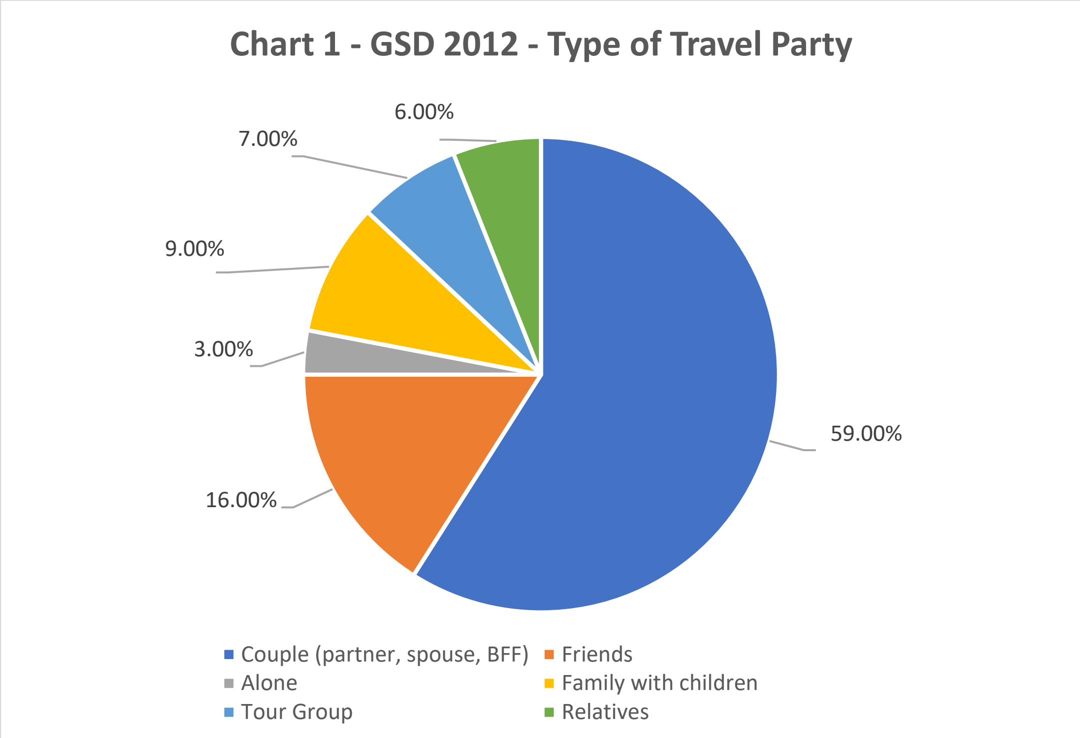
2018 GSD REPORT

The 2018 GSD Report estimates the total value of tourism to the region as $69.8m in 2017. This was based on the number of visitors (53,159), the average length of stay (13.98 days) and the average expenditure per day of leisure visitors ($94.02). Air services were not included in these calculations

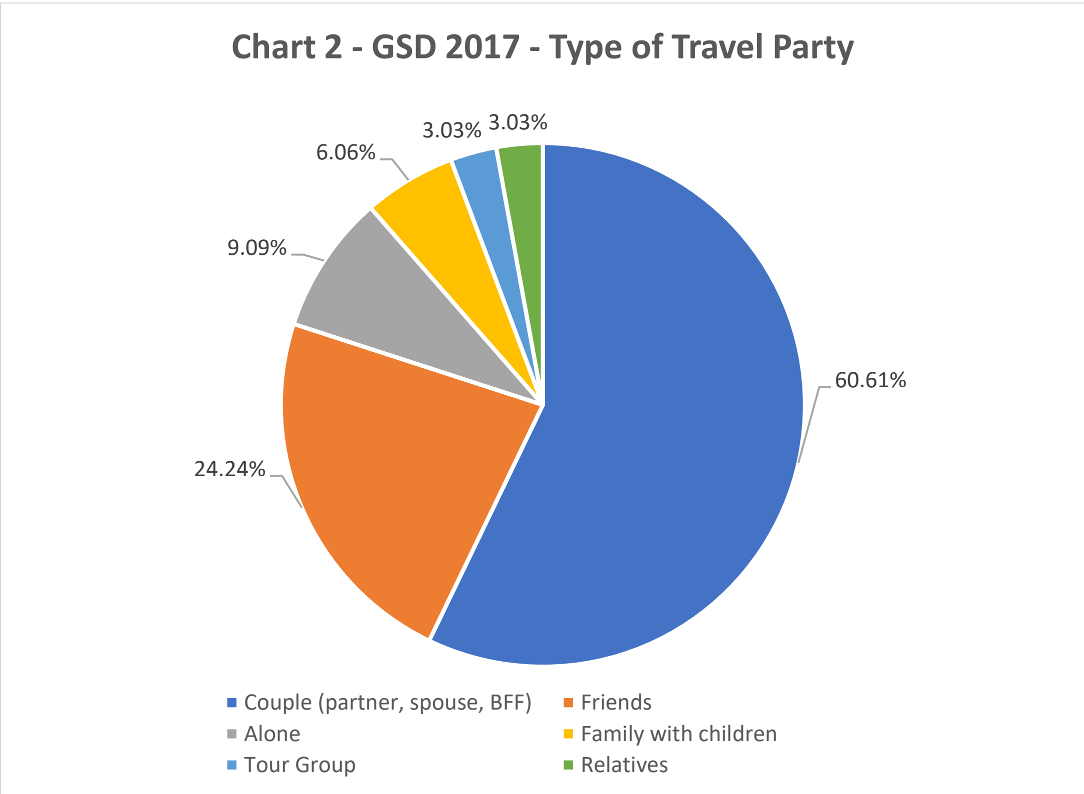
WHO ARE THE LEISURE VISITORS TO THE GULF SAVANNAH?

TYPE OF TRAVEL PARTY

The 2012 Survey identified the prevalence of “travel-party” types as follows:

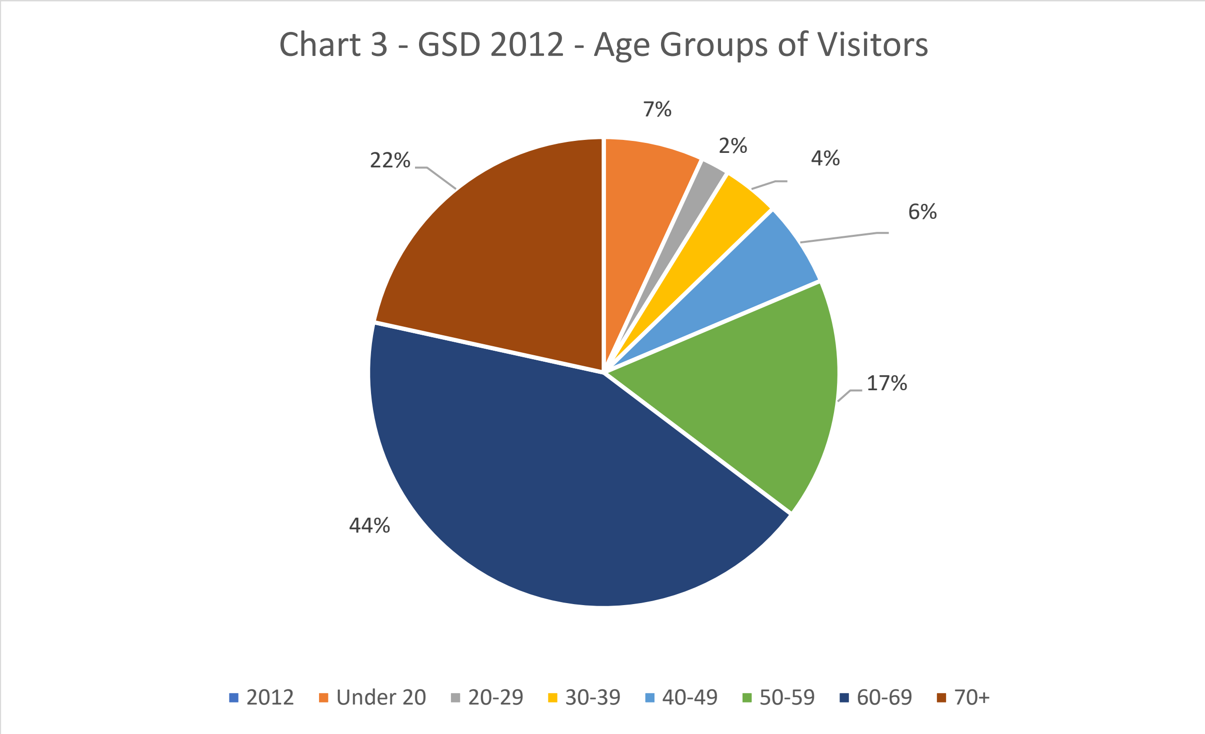


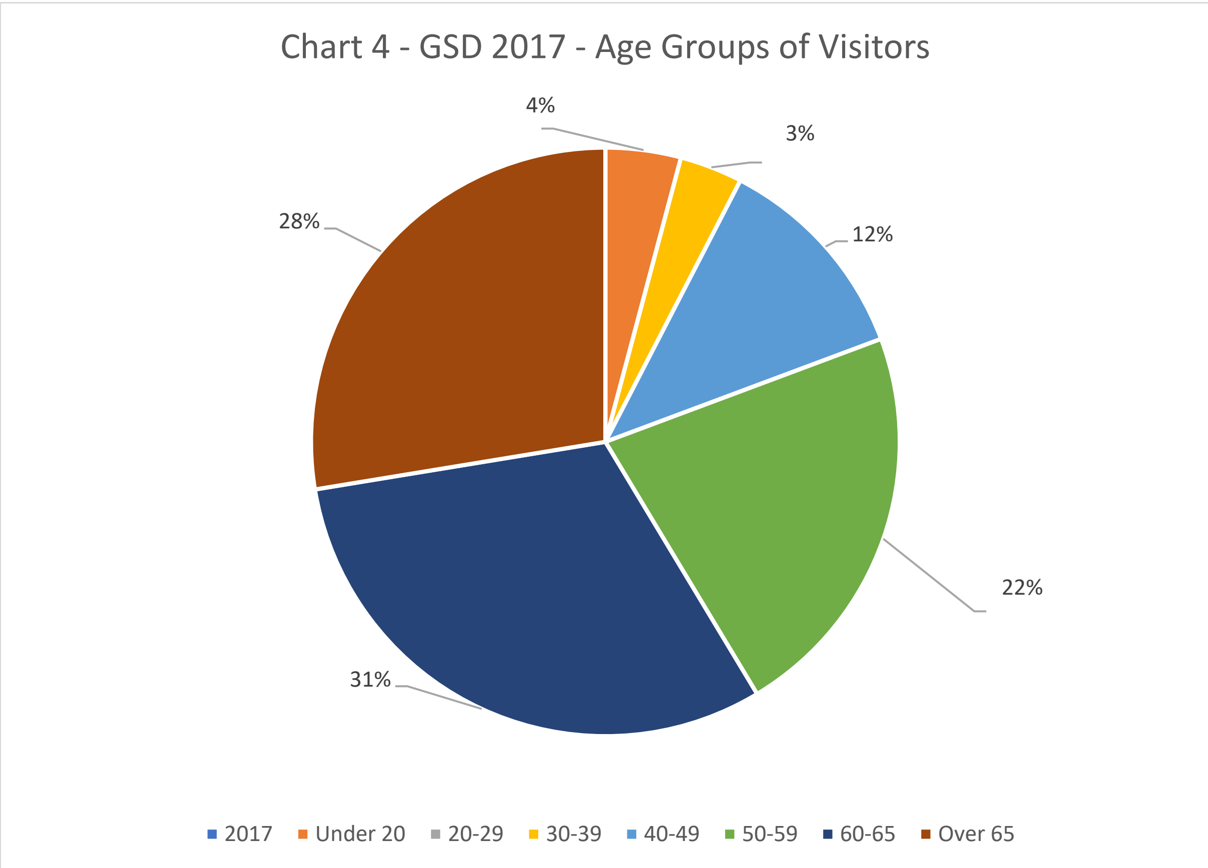
The results from the 2017 Survey were similar. Minor differences were seen between the % of solo travellers and the % of visitors travelling in tour groups. With sample sizes in the range we were able to achieve, an additional couple of tour groups in the 2017 Survey would have corrected for differences in this area.



AGE GROUPS OF VISITORS

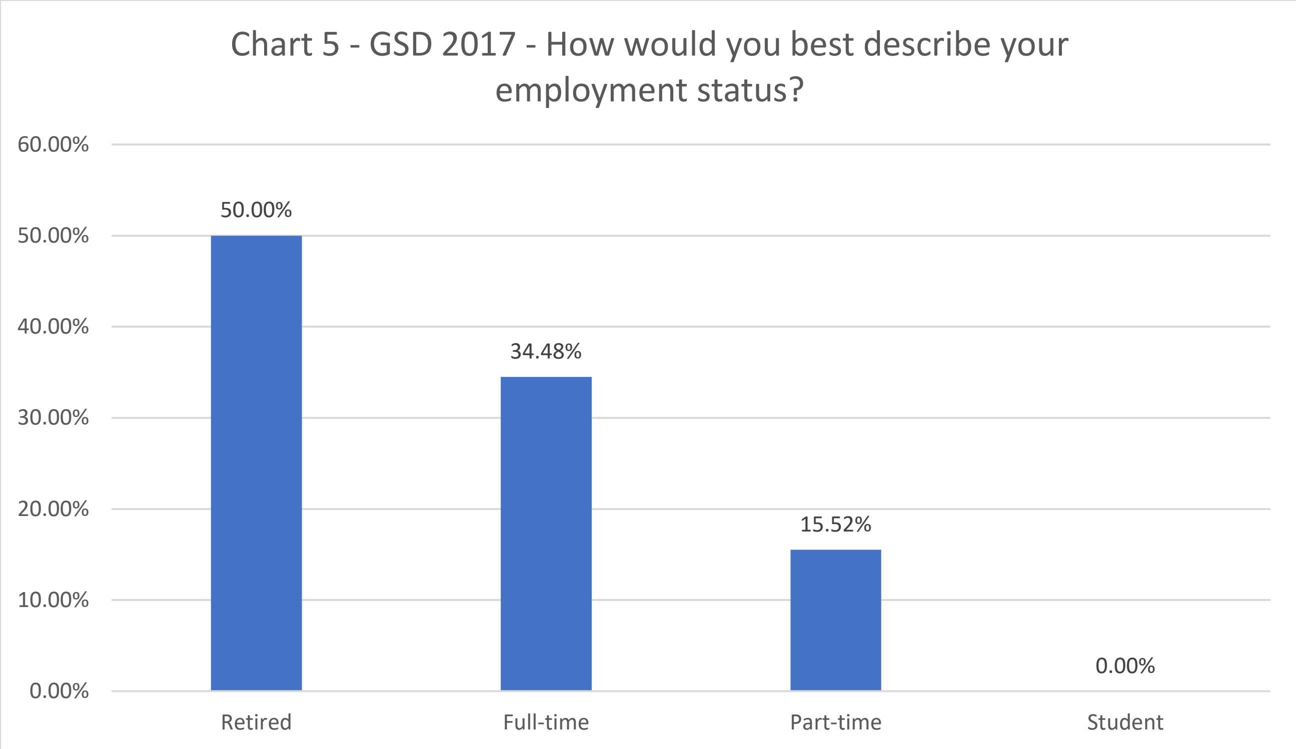
The GSD surveys capture age slightly differently to the IVS and NVS instruments. The later identify a 55+ age demographic, while GSD dissects this 55+ demographic into another two groups. Regardless, it remains the case that the majority of travellers to the Gulf are in the 60+ range (66% in 2012 and 59% in 2017). There were a larger proportion in the 40-49 year category in 2017 (12% to 6% in 2012) and a larger proportion in the 50-59 year category in 2017 (22% to 17% in 2012).



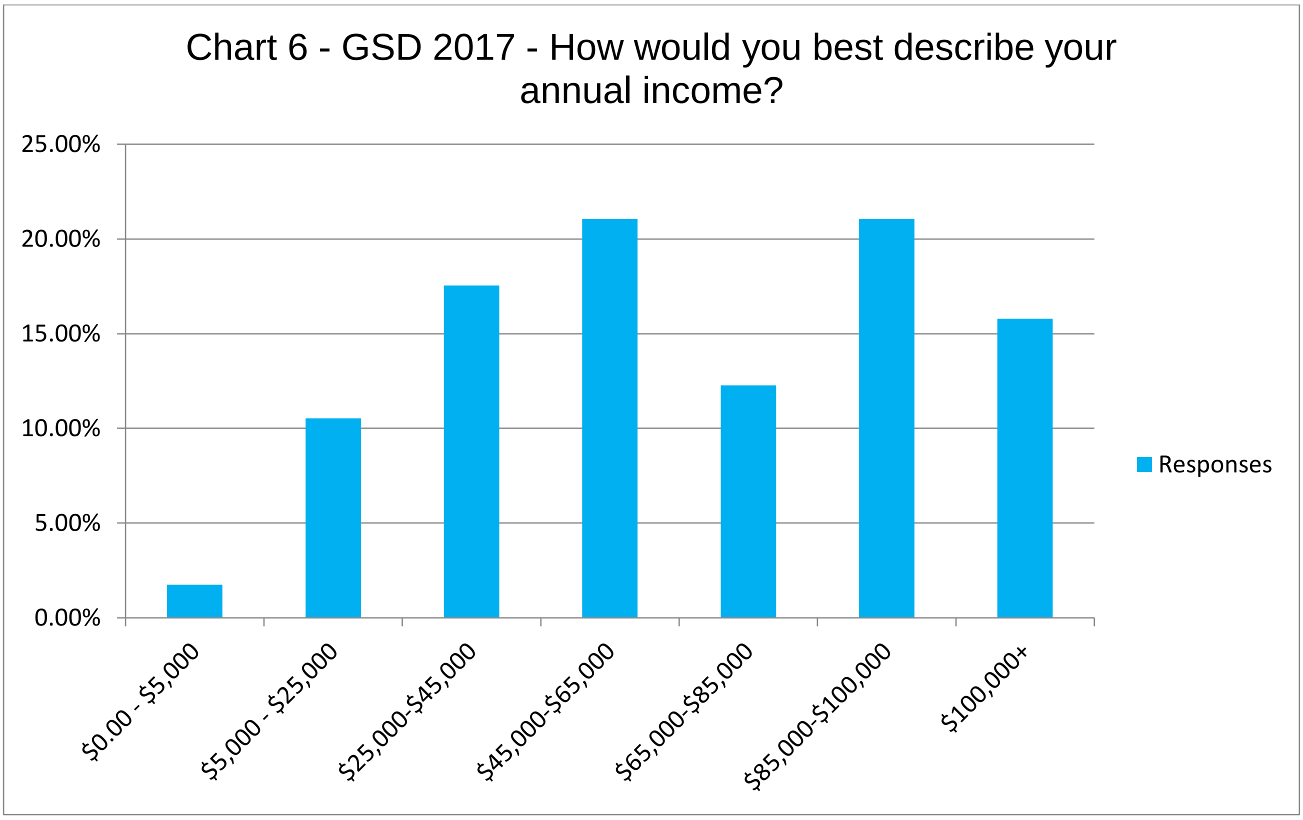


EMPLOYMENT STATUS & INCOME – GSD SURVEY 2017

GSD sought information on employment status and income in the 2017 survey. As indicated below, the majority of those travelling to the Gulf Savannah region identified as retired (50%). 34.8% identified as full-time employed, 15.2% as part-time and there were no responses received from students.

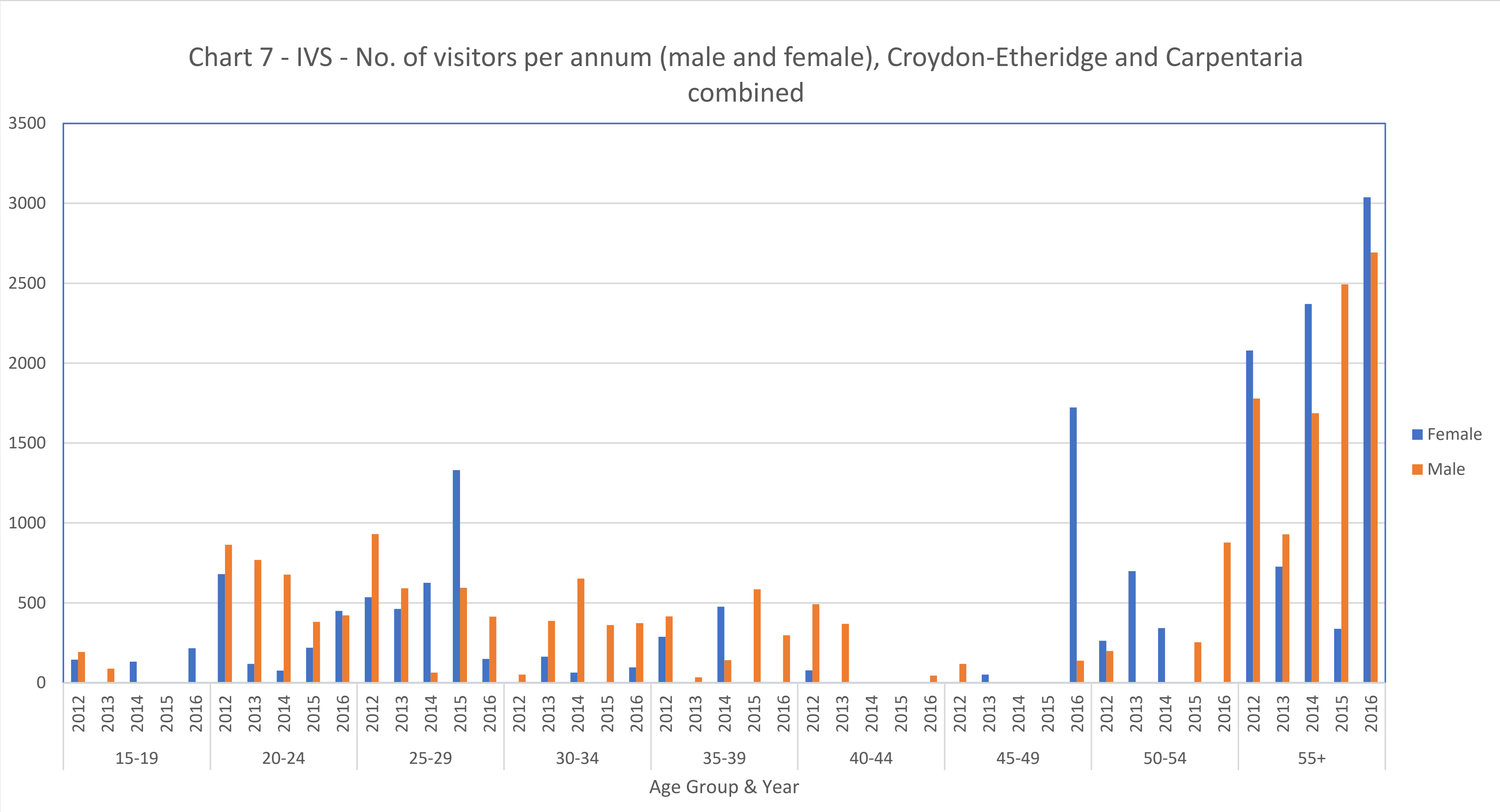


In relation to income brackets, those earning between $45,000-$65,000 and $85,000-$100,000 were the most commonly represented.



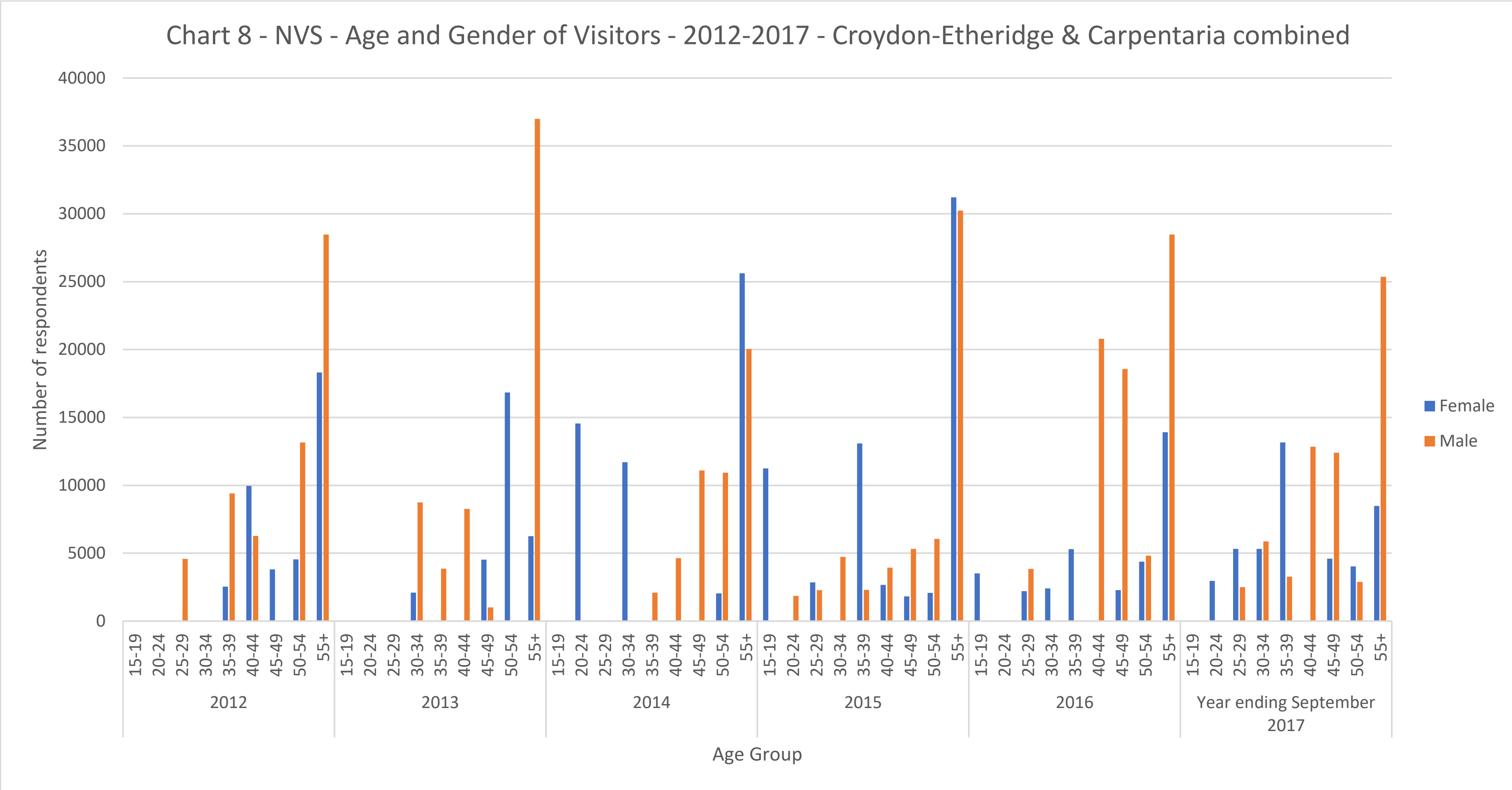
IVS 2012-2017 – VISITORS BY AGE AND GENDER

It will be noted that there is a lack of consistency between the age categories identified in the IVS and NVS instruments and those age categories identified by GSD in 2012 and 2017. Regardless of the differences, a familiar pattern is evidenced across all data sets and it is one that will come as no surprise to tourism operators in the Gulf: the dominant age group visiting the Gulf tends to be men and women aged 55+. 2016 data for 45-49 year women was incredibly strong, though represents as a significant outlier against all previous data sets.



NVS 2012- 2017– VISITORS BY AGE AND GENDER

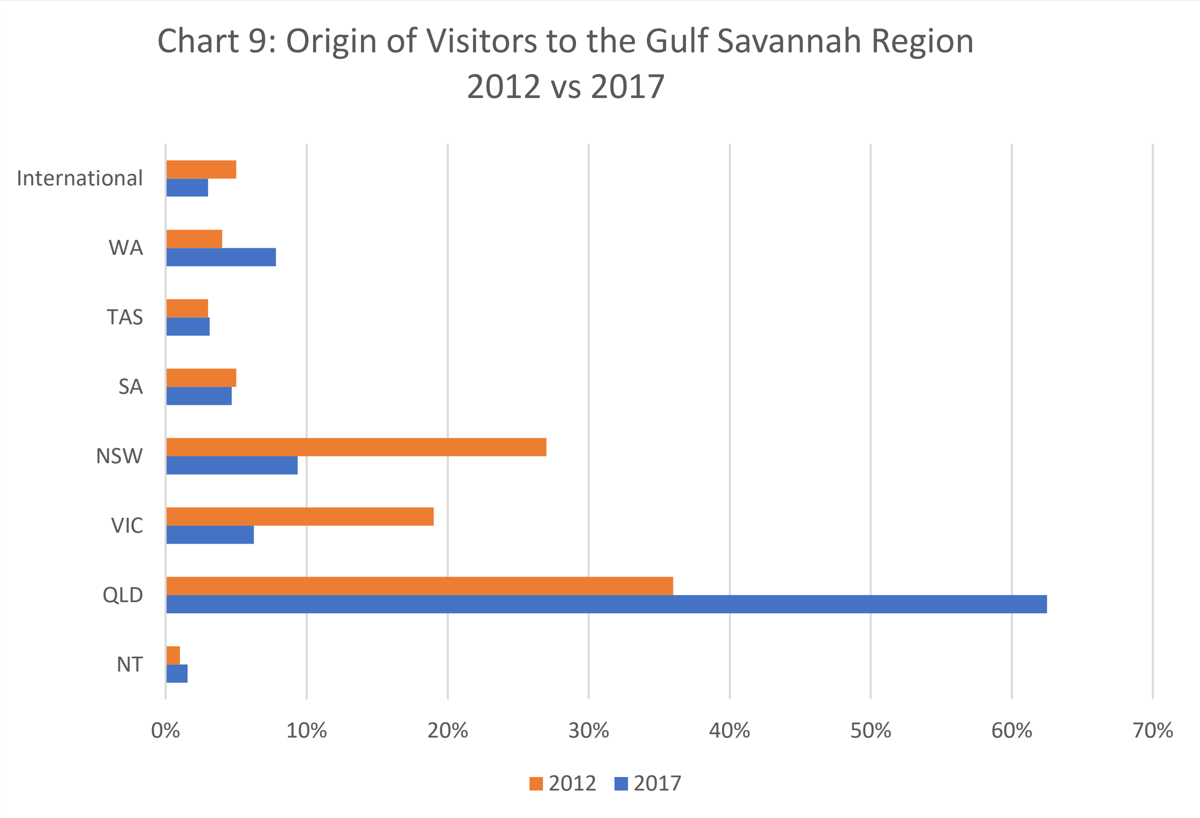
As with all other survey data (GSD 2012, GSD 2017, IVS 2012-2017), the National Visitor Survey identifies the 55+ age category as the best represented among visitors to the Gulf Savannah region. The NVS data also suggests an increase in 2016 and 2017 for the age categories 40-44 and 45-49. Substantial planning and effort will need to go into attracting this demographic to make up for the inevitable decrease in baby boomer visitations to the area in the coming 10-15 years.



WHERE ARE THEY FROM? STATE AND COUNTRY OF ORIGIN

There was quite a departure between 2012 and 2017 Survey results, particularly in relation to increases to the proportion of visitors to the Gulf Savannah region from QLD and the proportionate decreased in visitors from NSW and Victoria. Individual accommodation providers are encouraged to scrutinise these results closely, given the extent of the change between 2012 and 2017.

One possible explanation may relate to the proportion of return visitors to the region from Queensland. Given the relative remoteness of the Gulf Savannah region, it is likely that those more proximate (i.e. Queenslanders) are more likely to return to the region than those from other states who may visit the region as a “once in a lifetime” holiday or adventure.

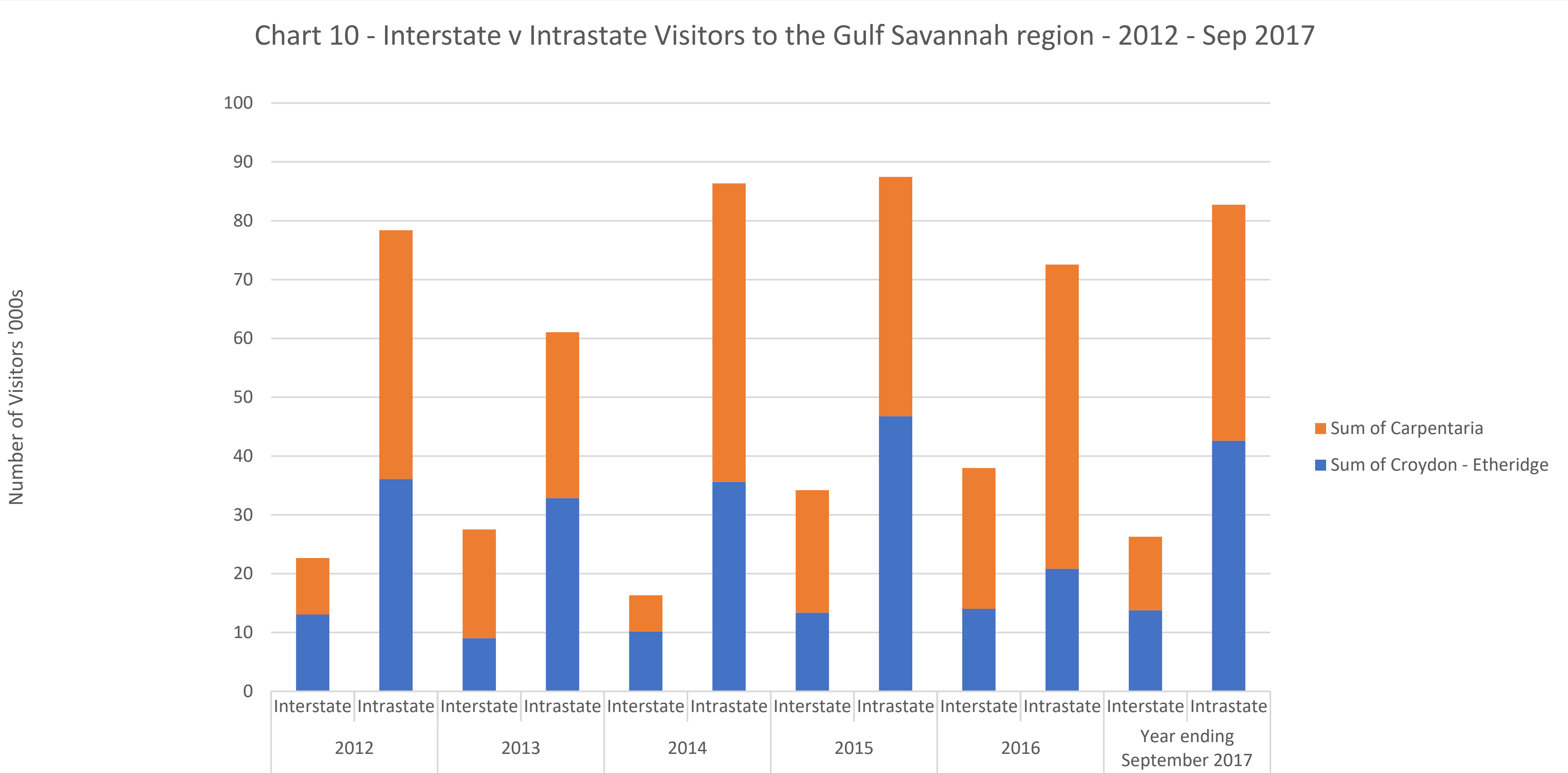


MAJOR CHALLENGE/OPPORTUNITY: in looking at the 2017 Survey data alongside trend data from the DVS (State of Origin of Visitors & Interstate v Intra-State Visitors), it would appear that the Gulf Savannah region has the opportunity to win more market share from interstate visitors.

REVIEW: GSD, Savannah Way Limited, TTNQ and other stakeholders

WHERE ARE THEY FROM? INTRA-STATE VS INTERSTATE ORIGIN OF TRAVELLERS TO THE GULF SAVANNAH

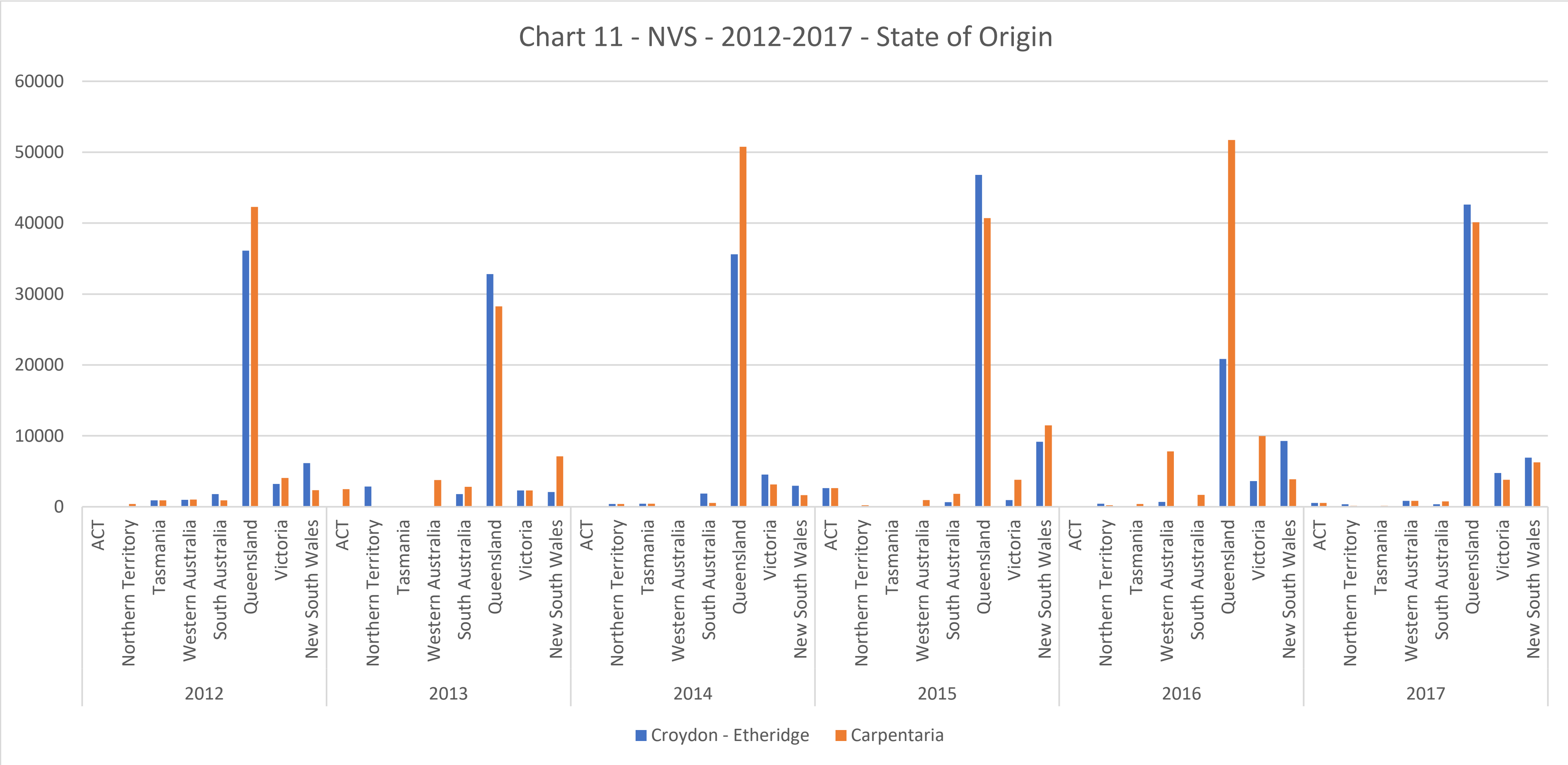
National Visitor Survey data for “Carpentaria” and “Croydon-Etheridge” between 2012-2017 is presented below. This chart focuses on Interstate vs Intrastate visitations and identifies that visitors to the Gulf Savannah region are predominantly from Queensland (Intrastate). Further research and planning will be required to determine the most effective way to increase interstate visitations (e.g. product development, product marketing etc.).



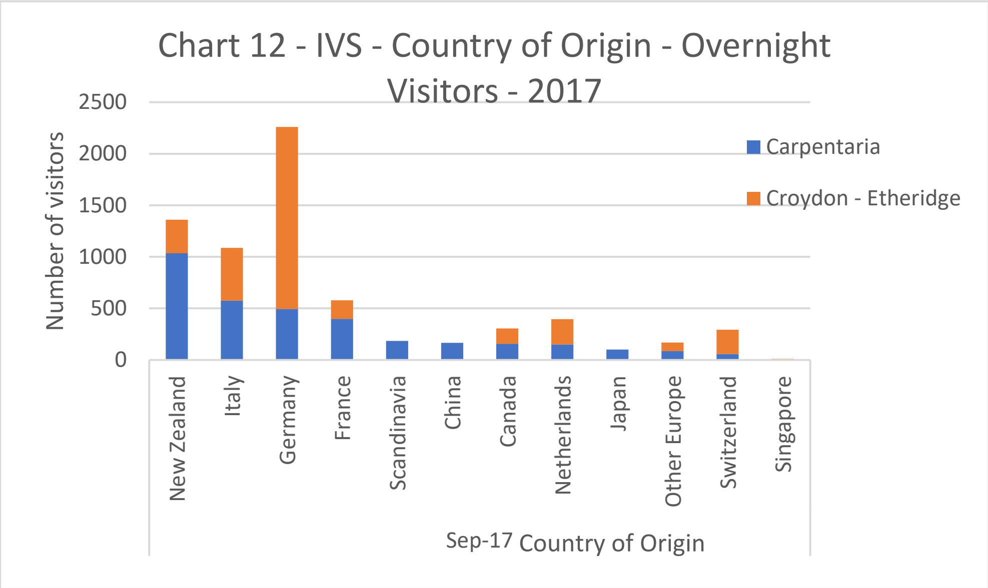
	2012 Interstate	2012 Intrastate	2013 Interstate	2013 Intrastate	2014 Interstate	2014 Intrastate	2015 Interstate	2015 Intrastate	2016 Interstate	2016 Intrastate	Year ending September 2017 Interstate	Year ending September 2017 Intrastate
Sum of Carpentaria	10	42	18	28	6	51	21	41	24	52	12	40
Sum of Croydon - Etheridge	13	36	9	33	10	36	13	47	14	21	14	43

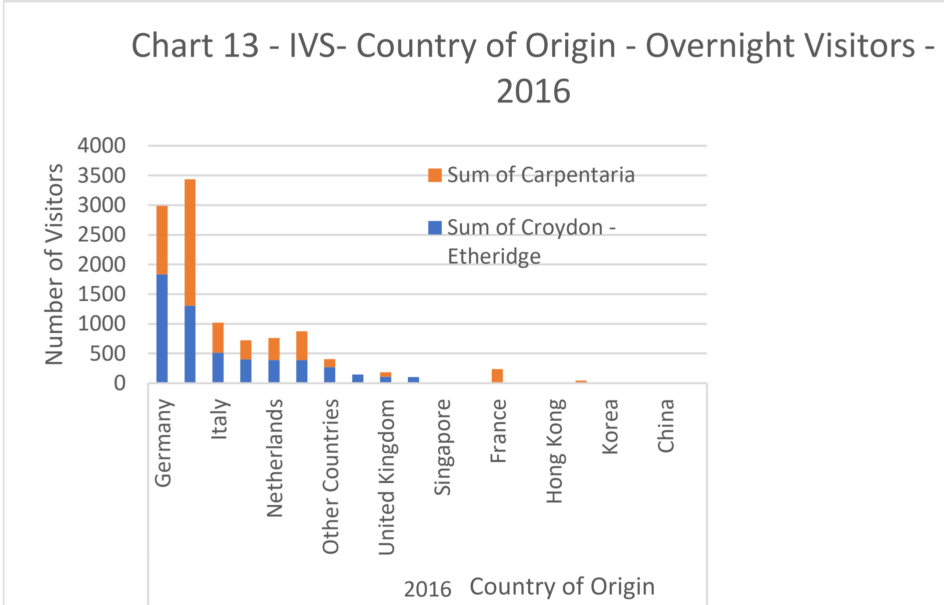
WHERE ARE THEY FROM? NVS 2012-2017 - STATE OF ORIGIN DATA

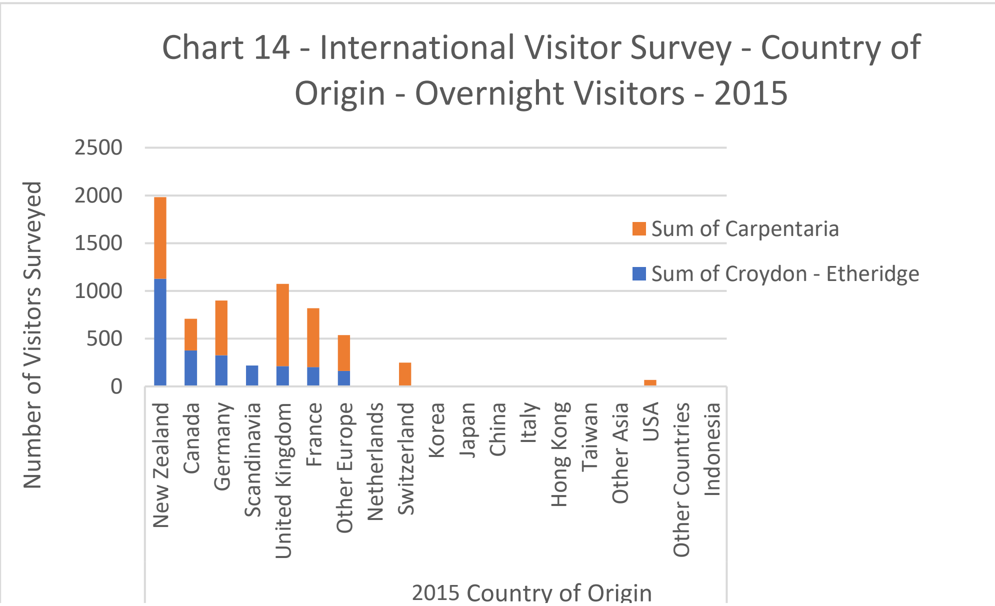
The NVS data echoes that found in the 2012 and 2017 GSD surveys, with Queensland providing the highest proportion of visitors to the Gulf Savannah region. As mentioned, identifying a pathway forward for capturing increased numbers/market share from interstate deserves consideration from key marketing organisations for the region in liaison with those involved in tourism product development (businesses, local governments, other entities).

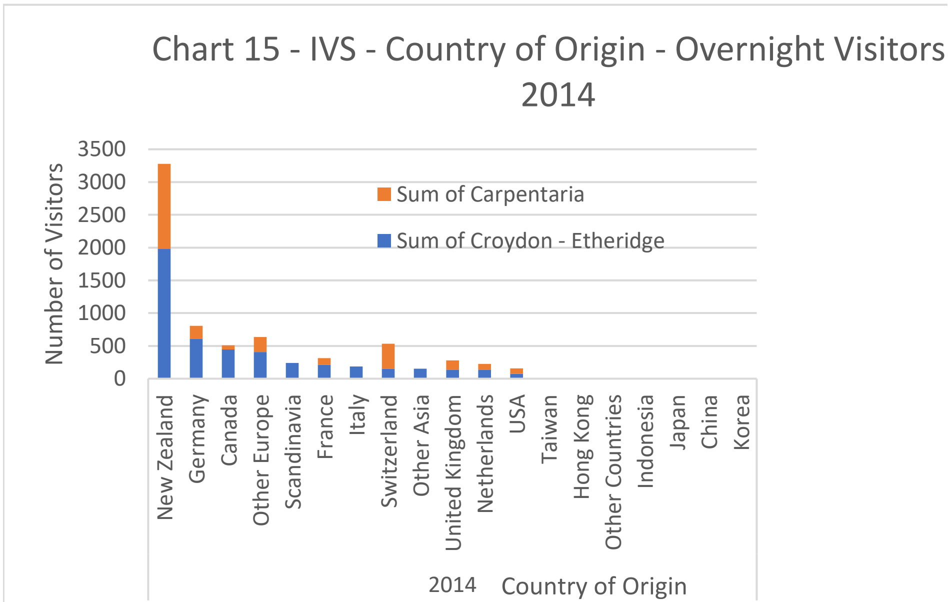


WHERE ARE THEY FROM? IVS 2012-2017 – COUNTRY OF ORIGIN







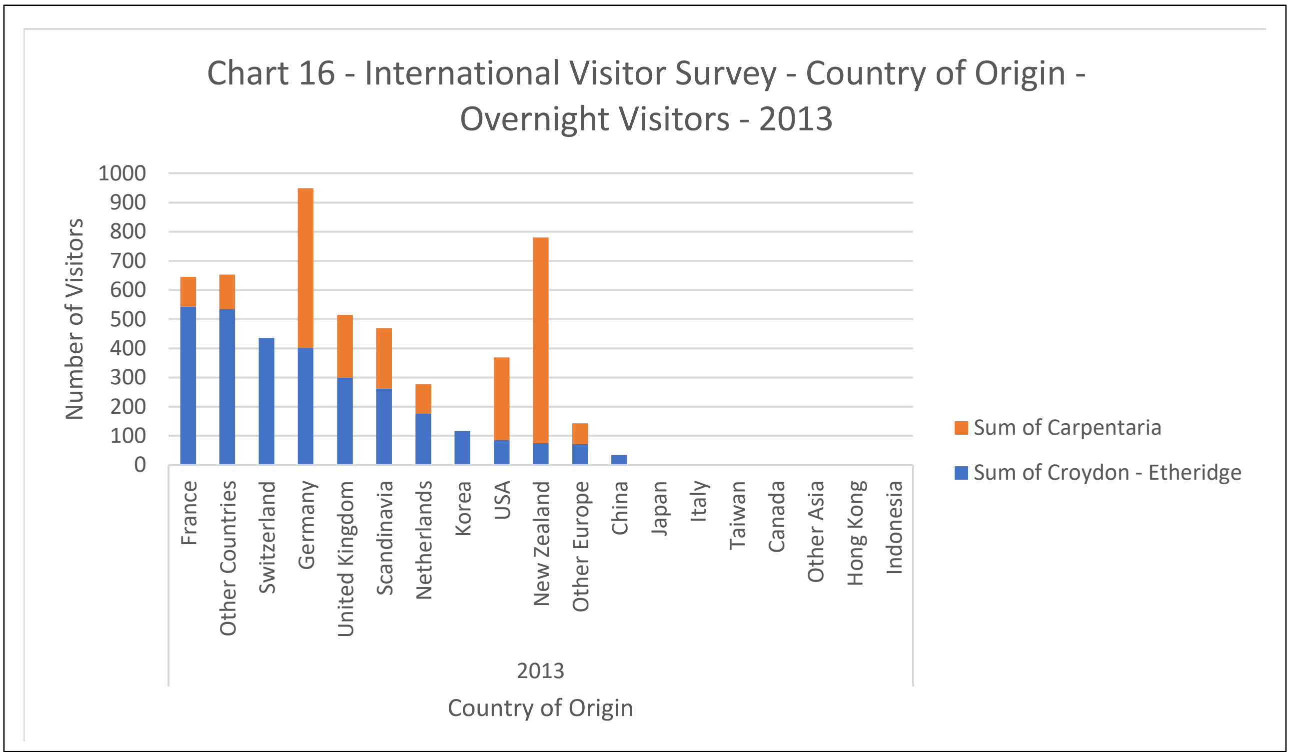


WHERE ARE THEY FROM? IVS COUNTRY OF ORIGIN CONTD

As with results for 2014-2017, Germany and New Zealand provided the highest numbers of overseas visitors to the Gulf Savannah region. This squares with Australia-wide trends in the camping and caravan markets (Caravan Industry of Australia, 2017, pp. 23, 25).

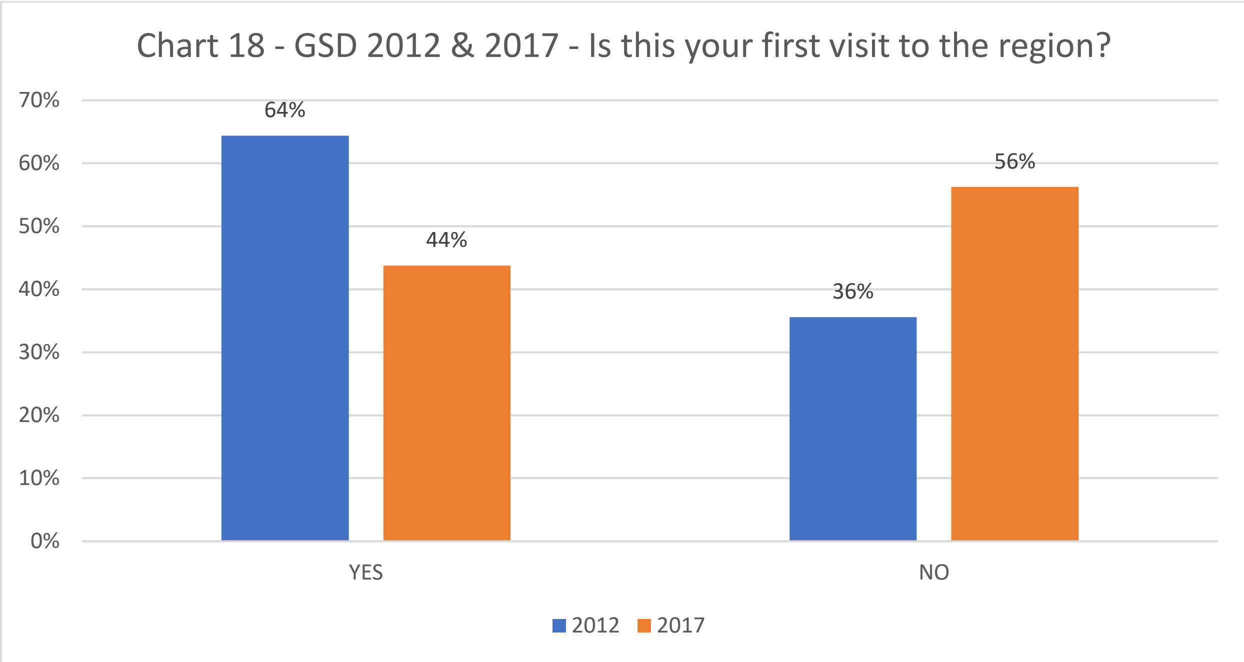
An opportunity exists to further assess and review what is working in Germany and New Zealand with regard to the marketing of the Gulf and/or drive tourism and/or particular locations/activities within the Gulf.

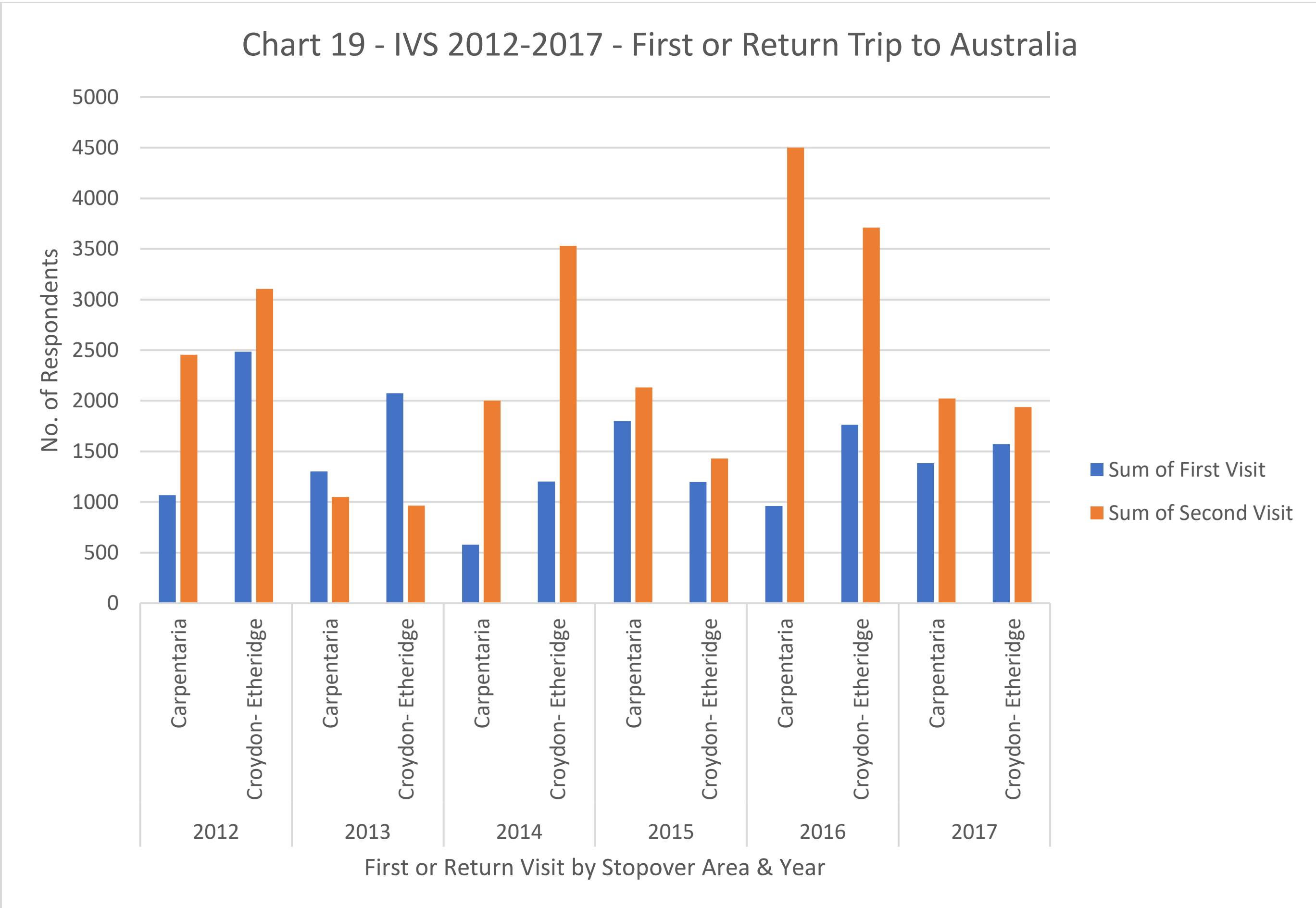
It is also incumbent upon GSD, Savannah Way and others to reflect on the record number of Chinese visitors to Queensland in 2017 and the absence of any statistical evidence of Chinese visitation in the 2012, 2014, 2015, 2016 and minor visitation numbers in 2017.



GSD 2012 & 2017 – FIRST OR RETURN VISIT?

The 2012 and 2017 surveys provide a stark contrast in relation to 1st and 2nd time visitors. One would hope that this is because the first-time visitors in 2012 have returned to the Gulf in 2017. Regardless, it would appear that the high proportion of return visitors identified in the 2017 survey squares with the IVS trend data. First-time vs Return Visit data is unavailable for the National Visitor Survey.





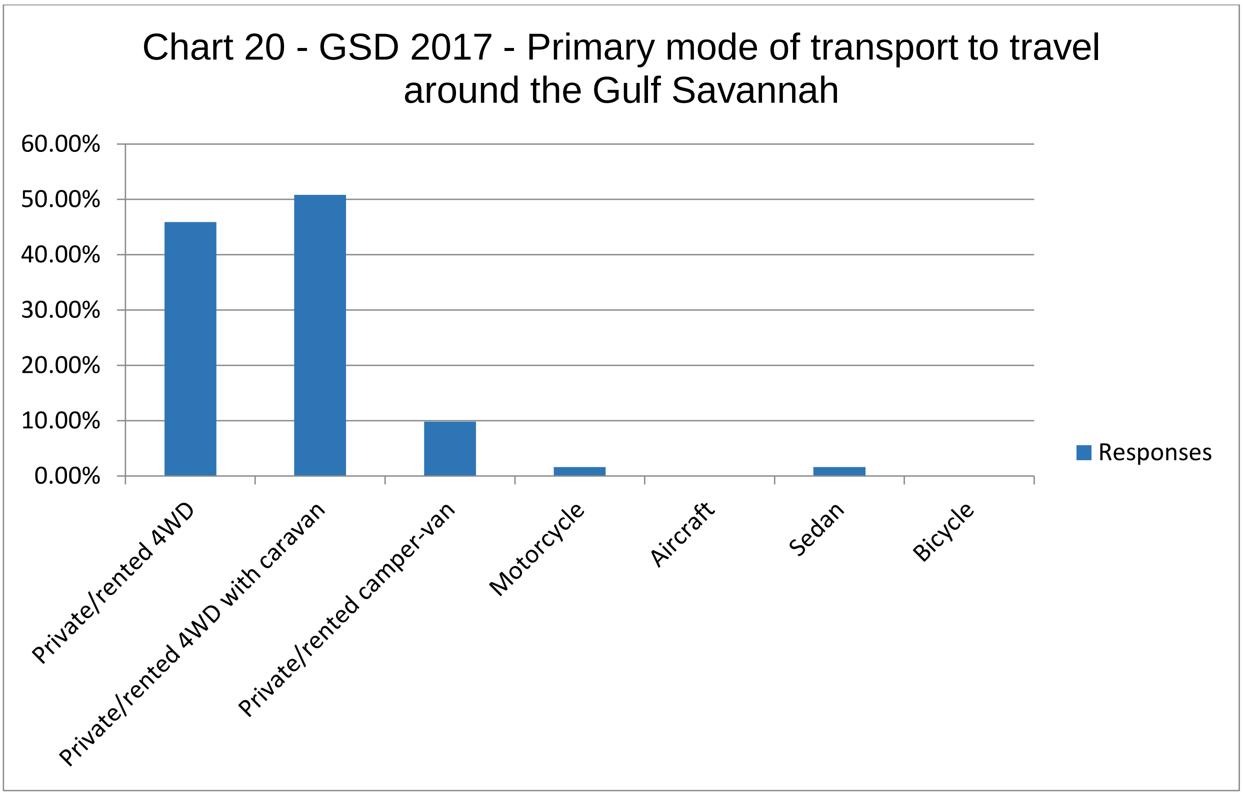
GSD 2017 –MODE OF TRANSPORTATION

The 2012 Tourism Survey identified the following transportation characteristics:

- 91.6% travelled in 4WD vehicles;
- 59.6% of travellers towed caravans and another 18.6% towed camper trailers;
- 10.8% travelled in campervans and another 8.7% used motorhomes.

The 2017 Tourism Survey identified similar transportation preferences with

- 96.72% travelling with 4WDs;
- 50.82% travelling with caravans;
- 9.84% travelling with campervans.



OTHER TRENDS AND PATTERNS - CARAVANS

In discussions with accommodation providers catering to caravans, the issue of caravan length was raised on a number of occasions. Accommodation providers noted that the increasing length of these vehicles was placing pressure on caravan parks.

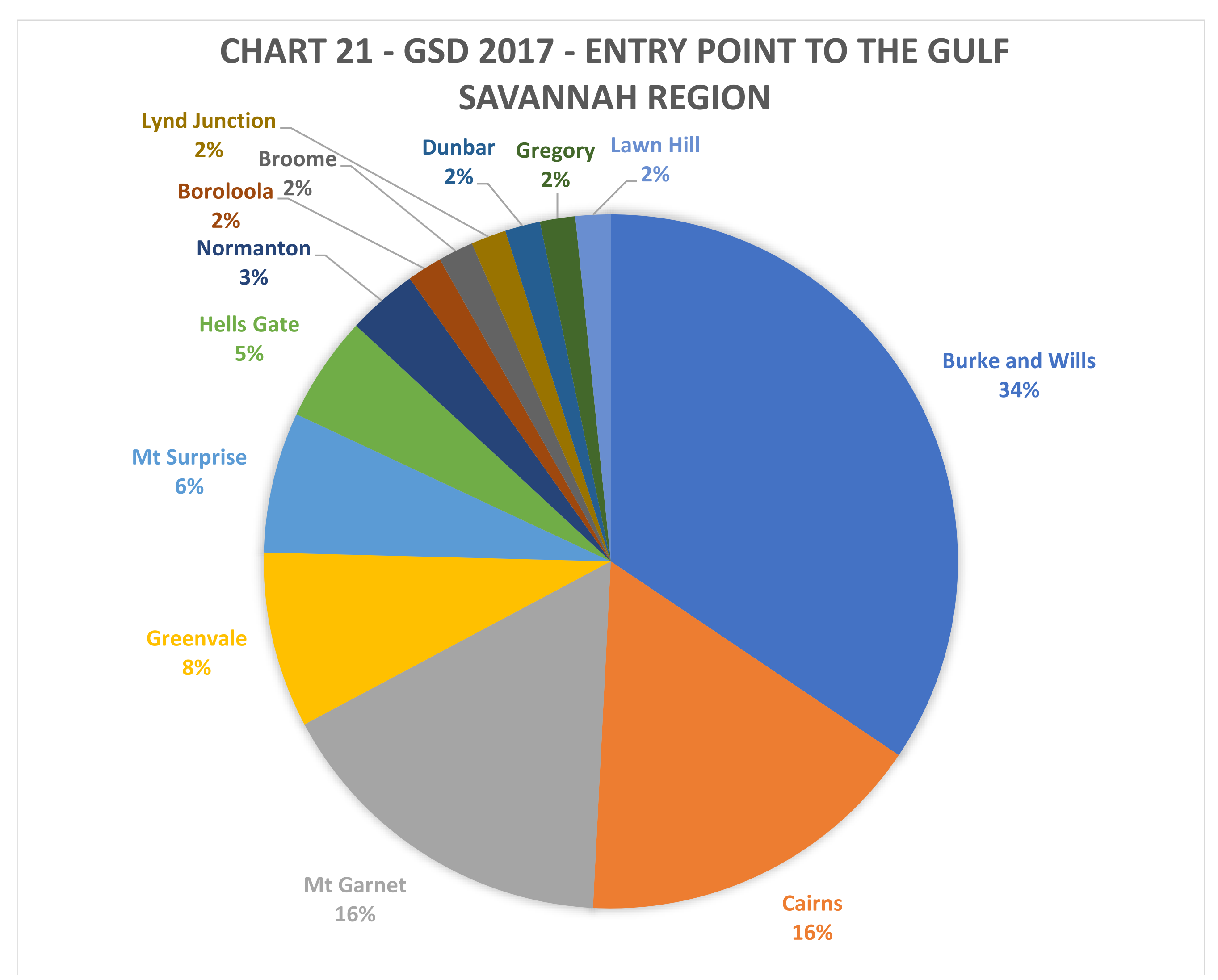
This trend is born out in research recently completed by the Caravan Industry of Australia:

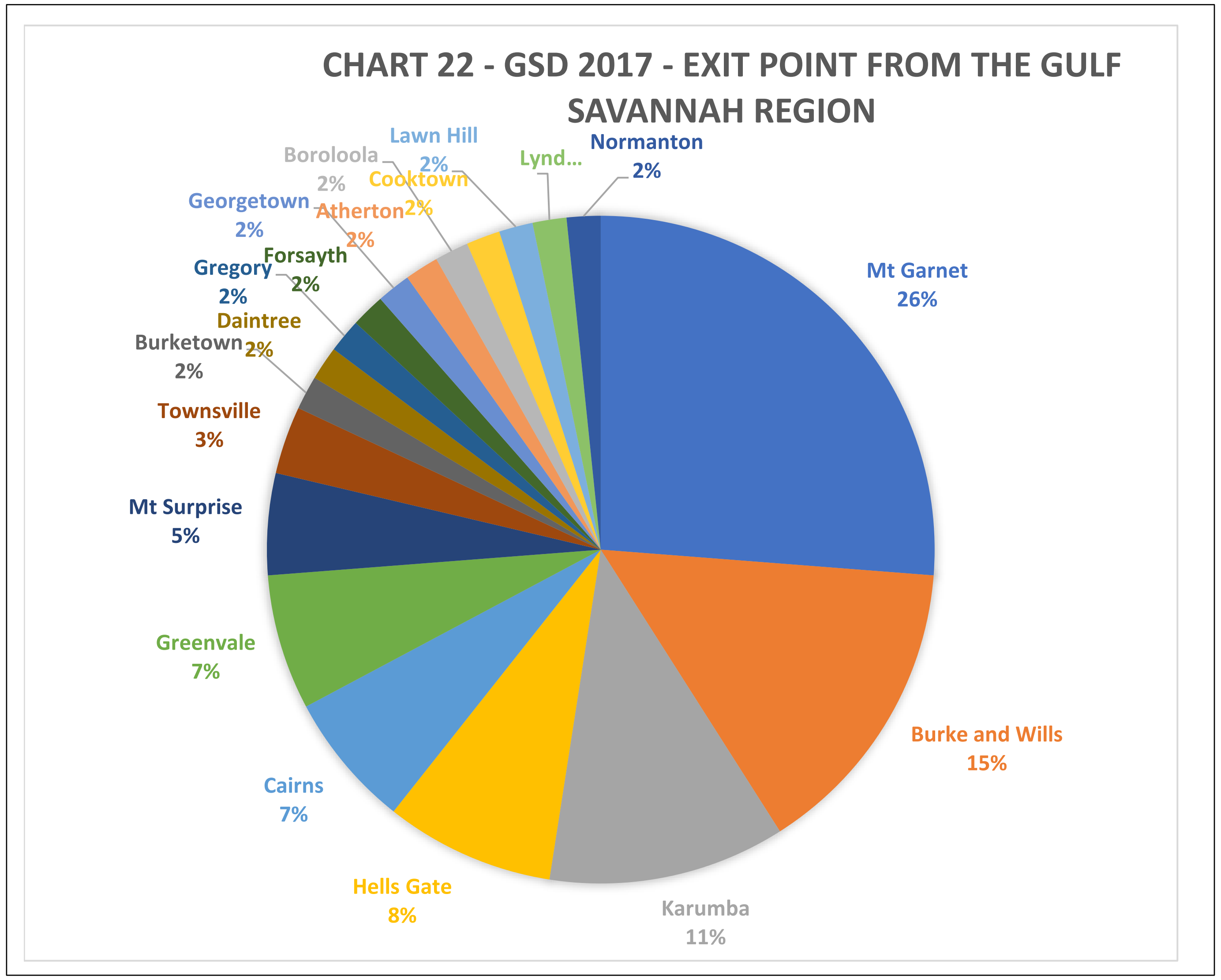
> "The majority (57%) of towable units manufactured in 2016 were over 6 metres in length, with 11,605 units constructed last year. This represents a 5% increase on the previous year's results and signifies the continued consumer demand for longer towable recreational vehicles to accommodate the increased need for living space and for onboard whitegoods and equipment."[1]

[1] "Caravan and Camping: State of Industry", Caravan Industry of Australia, 2017, p. 10.

GSD 2012 & 2017 - ENTRY AND EXIT POINTS TO THE GULF

ENTRY POINT: the most popular single-selected entry point to the Gulf in the 2017 survey was through Burke and Wills (34%), which was similar to the 2012 Survey result (34%). However, If we combine "Cairns" + "Mt Garnet" + "Mt Surprise", entry to the Gulf Savannah region via the Kennedy Highway/Gulf Developmental Road is the most popular (38%), as it was in the 2012 survey (38%). EXIT POINT: the most popular single-selected exit point was through Mt Garnet (26%). When combined with "Cairns" + "Mt Surprise", this increases to 38% as against the 2012 Survey figure of 45%. Entry and Exit into the Gulf Savannah at the QLD/NT border was fairly similar. 2012 entry was at 7.5% and 2017 at 9% and 2012 exist was at 10.5% and 2017 at 10%.





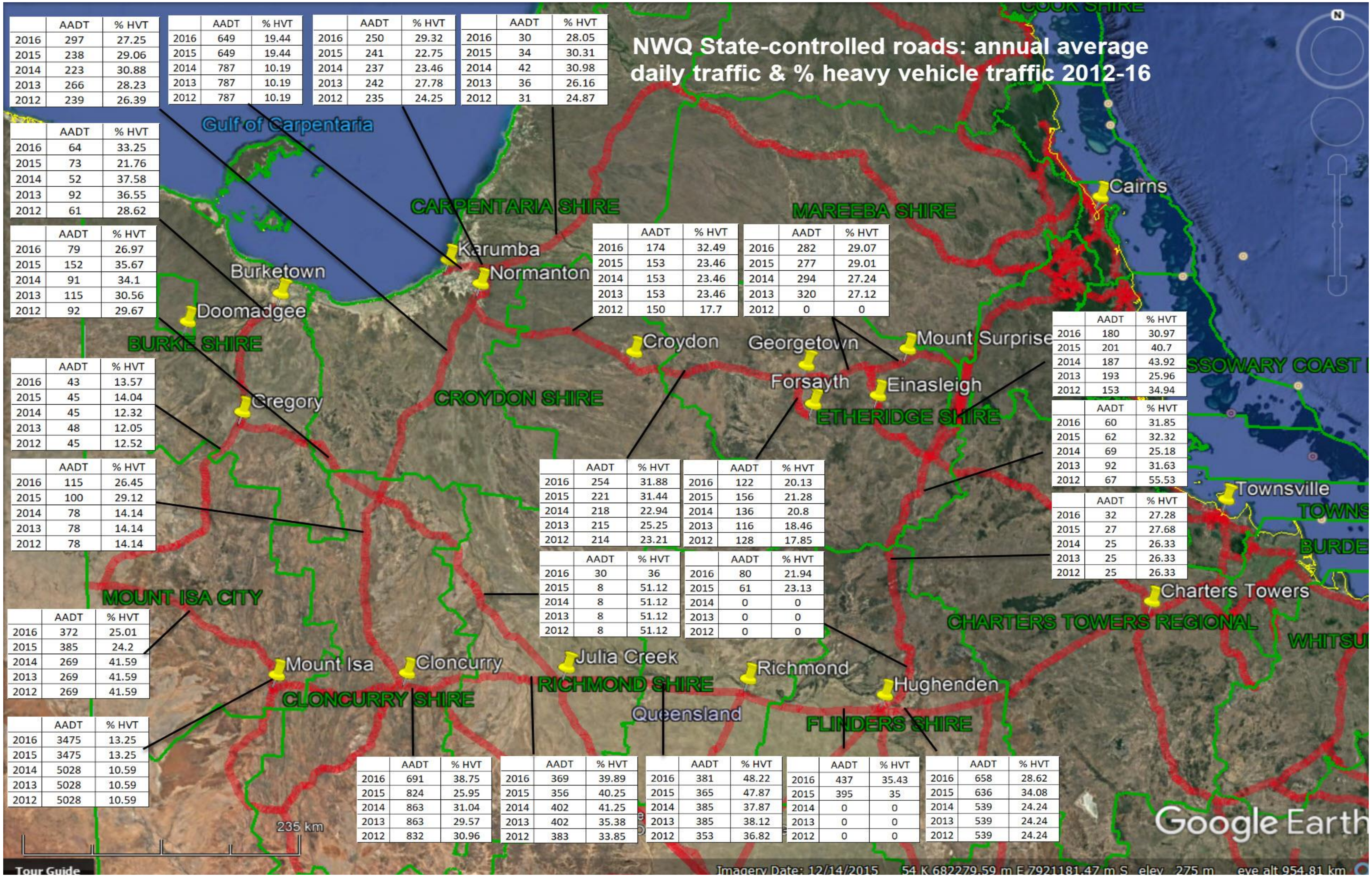
GSD 2012 & 2017 - WHICH TOWNS DID RESPONDENTS ACTUALLY VISIT?

The 2012 survey recorded visitation levels to the region in the following categories: "eastern" (Etheridge west to the Gilbert River), "central" (Croydon , Carpentaria and the Burke and Wills Roadhouse) and "western" (Burketown and Doomadgee) sections of the Gulf Savannah Region. The results in the 2017 survey were similar:

TABLE 1	2012	2017
East	88.2%	88%
Central	81.9%	80%
West	45.6%	54%

TABLE 2		Burketown	Croydon	Doomadgee	Einasleigh	Forsayth	Georgetown	Gregory	Karumba	Mt Surprise	Normanton
% respondents who stopped in each town	2012	22%	54%	7%	18%	23%	59%	28%	62%	63%	69%
	2017	54%	62%	3%	32%	41%	88%	52%	80%	66%	77%
	+/-	+32%	+12%	-4%	+14%	+18%	+29%	+24%	+18%	+3%	+8%

NORTH WEST QUEENSLAND STATE-CONTROLLED ROADS – ANNUAL AVERAGE DAILY TRAFFIC & HEAVY VEHICLE TRAFFIC (%)



	AADT	% HVT
2016	297	27.25
2015	238	29.06
2014	223	30.88
2013	266	28.23
2012	239	26.39

	AADT	% HVT
2016	649	19.44
2015	649	19.44
2014	787	10.19
2013	787	10.19
2012	787	10.19

	AADT	% HVT
2016	250	29.32
2015	241	22.75
2014	237	23.46
2013	242	27.78
2012	235	24.25

	AADT	% HVT
2016	30	28.05
2015	34	30.31
2014	42	30.98
2013	36	26.16
2012	31	24.87

	AADT	% HVT
2016	64	33.25
2015	73	21.76
2014	52	37.58
2013	92	36.55
2012	61	28.62

	AADT	% HVT
2016	79	26.97
2015	152	35.67
2014	91	34.1
2013	115	30.56
2012	92	29.67

	AADT	% HVT
2016	174	32.49
2015	153	23.46
2014	153	23.46
2013	153	23.46
2012	150	17.7

	AADT	% HVT
2016	282	29.07
2015	277	29.01
2014	294	27.24
2013	320	27.12
2012	0	0

	AADT	% HVT
2016	180	30.97
2015	201	40.7
2014	187	43.92
2013	193	25.96
2012	153	34.94

	AADT	% HVT
2016	43	13.57
2015	45	14.04
2014	45	12.32
2013	48	12.05
2012	45	12.52

	AADT	% HVT
2016	60	31.85
2015	62	32.32
2014	69	25.18
2013	92	31.63
2012	67	55.53

	AADT	% HVT
2016	115	26.45
2015	100	29.12
2014	78	14.14
2013	78	14.14
2012	78	14.14

	AADT	% HVT
2016	254	31.88
2015	221	31.44
2014	218	22.94
2013	215	25.25
2012	214	23.21

	AADT	% HVT
2016	122	20.13
2015	156	21.28
2014	136	20.8
2013	116	18.46
2012	128	17.85

	AADT	% HVT
2016	32	27.28
2015	27	27.68
2014	25	26.33
2013	25	26.33
2012	25	26.33

	AADT	% HVT
2016	30	36
2015	8	51.12
2014	8	51.12
2013	8	51.12
2012	8	51.12

	AADT	% HVT
2016	80	21.94
2015	61	23.13
2014	0	0
2013	0	0
2012	0	0

	AADT	% HVT
2016	372	25.01
2015	385	24.2
2014	269	41.59
2013	269	41.59
2012	269	41.59

	AADT	% HVT
2016	3475	13.25
2015	3475	13.25
2014	5028	10.59
2013	5028	10.59
2012	5028	10.59

	AADT	% HVT
2016	691	38.75
2015	824	25.95
2014	863	31.04
2013	863	29.57
2012	832	30.96

	AADT	% HVT
2016	369	39.89
2015	356	40.25
2014	402	41.25
2013	402	35.38
2012	383	33.85

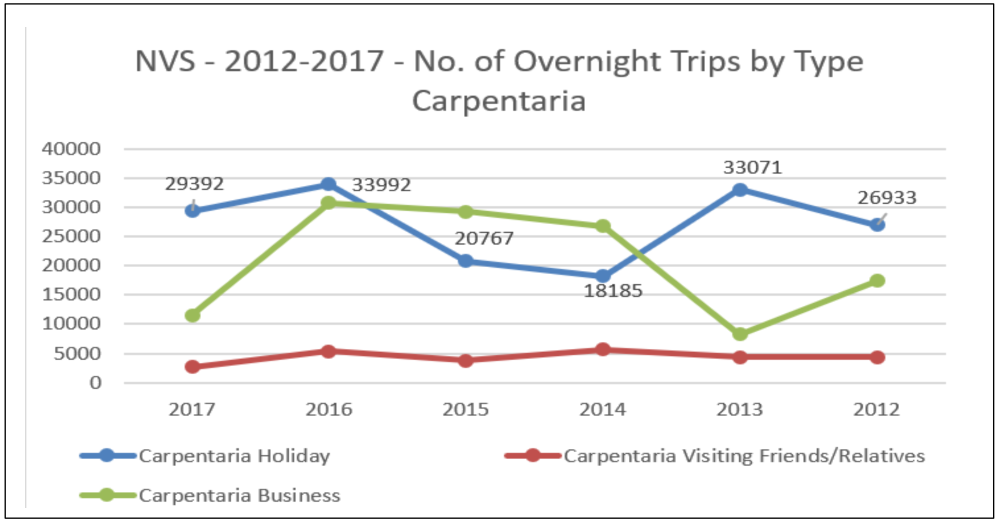
	AADT	% HVT
2016	381	48.22
2015	365	47.87
2014	385	37.87
2013	385	38.12
2012	353	36.82

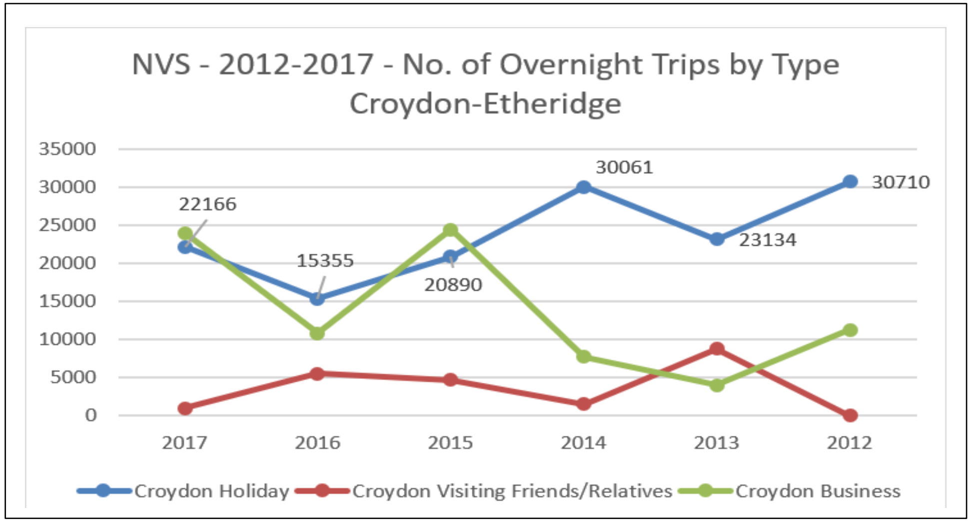
	AADT	% HVT
2016	437	35.43
2015	395	35
2014	0	0
2013	0	0
2012	0	0

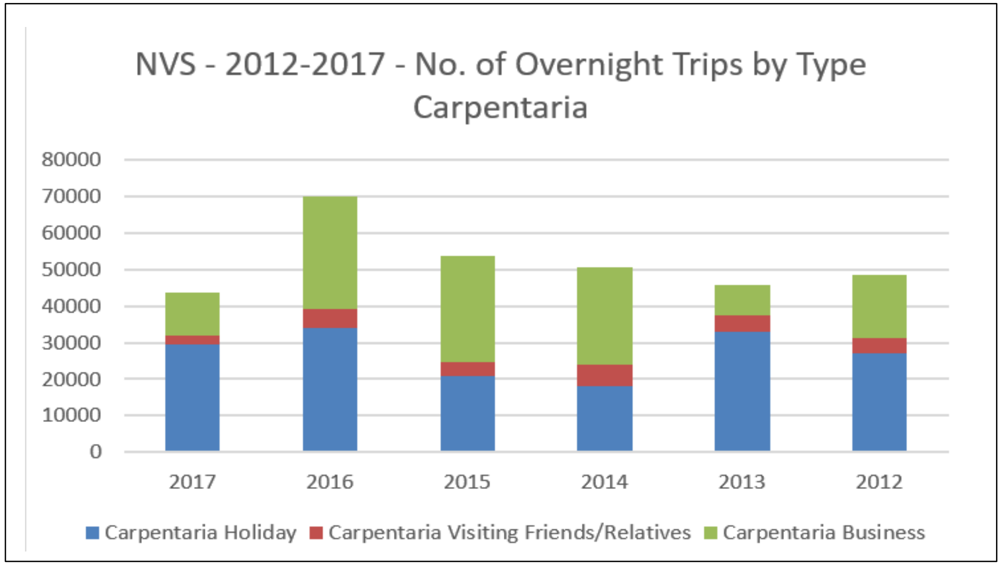
	AADT	% HVT
2016	658	28.62
2015	636	34.08
2014	539	24.24
2013	539	24.24
2012	539	24.24

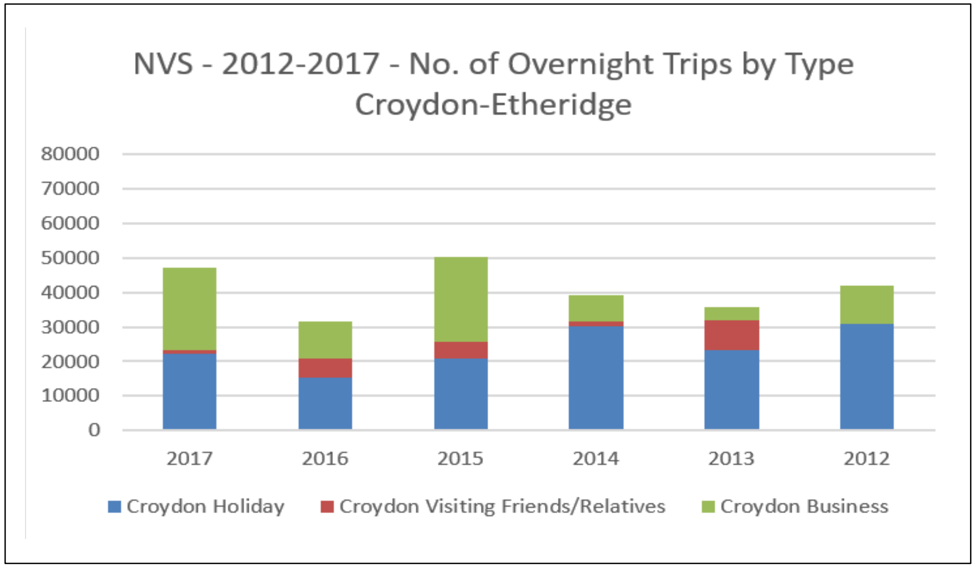
REASONS FOR TRAVEL – NVS 2012-2017

The below data is taken from the National Visitor Survey and delineates the reasons for travel by those visiting the Gulf into a) Holiday; b) Visiting friends or relatives; and c) Business. TRA data is based on a small sample set, but averaging over a six-year period, suggests around 32,892 leisure visitations per year to Carpentaria and an average of 29,453 leisure visitors to Croydon-Etheridge per year.



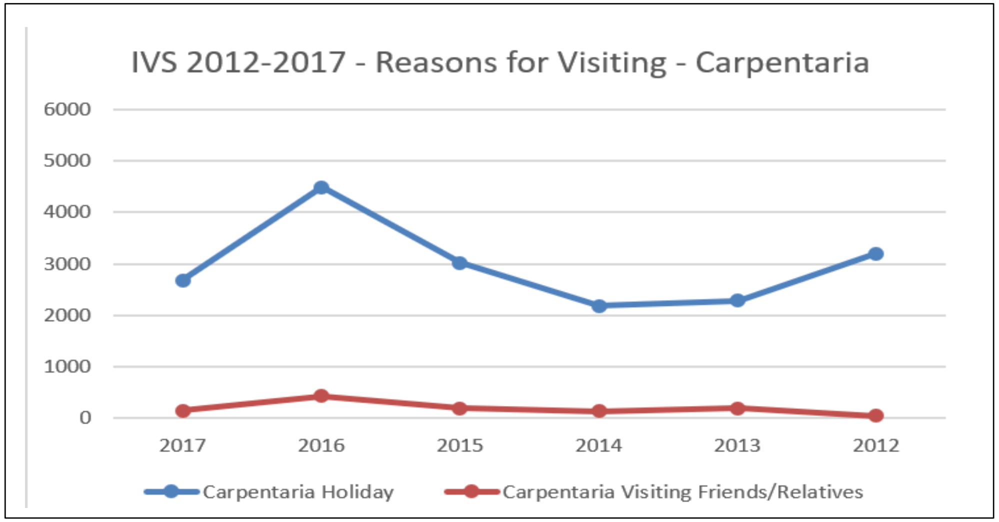


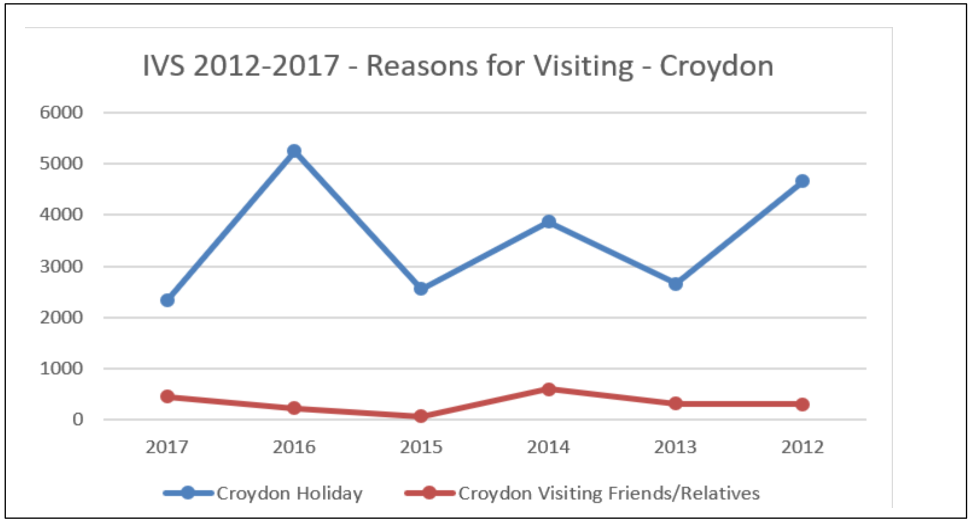


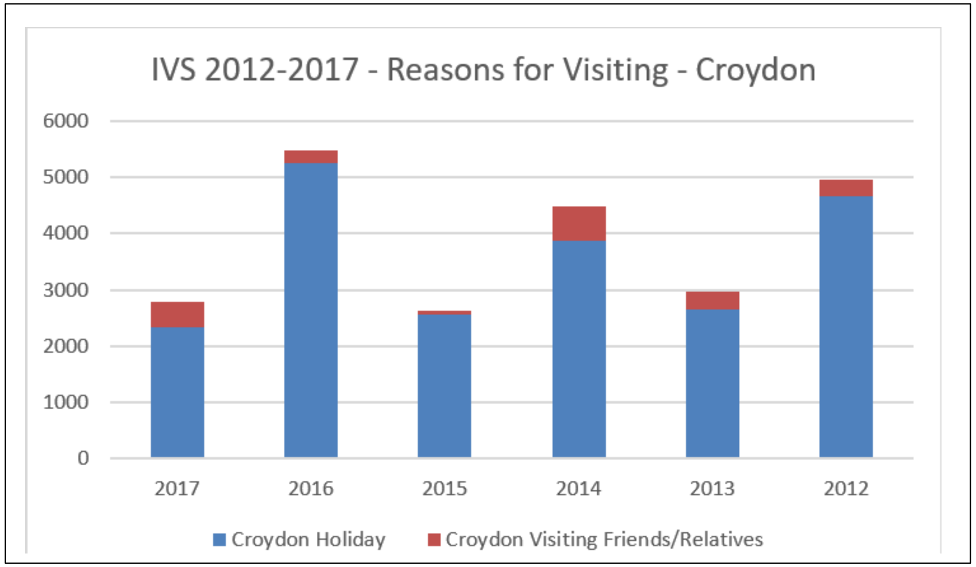


REASONS FOR TRAVEL – IVS 2012-2017

The below data is taken from the International Visitor Survey and delineates the reasons for travel by those visiting the Gulf into a) Holiday; and b) Visiting friends or relatives. Data for "Business" travel has not been included. As indicated, TRA data (especially for IVS in the Gulf Savannah) is based on a very small sample set. Averaged over a six-year period, Carpentaria records around 3,166 leisure visitations per year and Croydon-Etheridge receives around 3,879 leisure visitors per year.

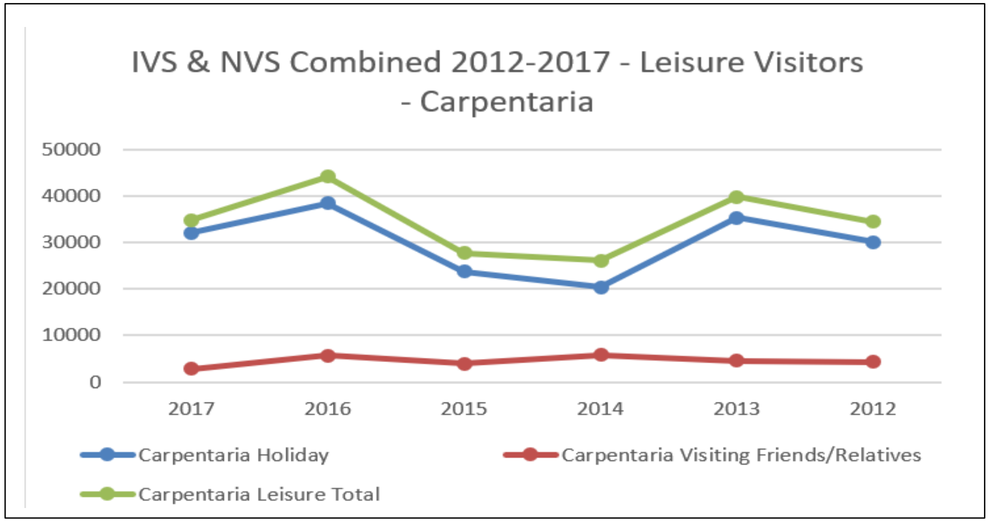


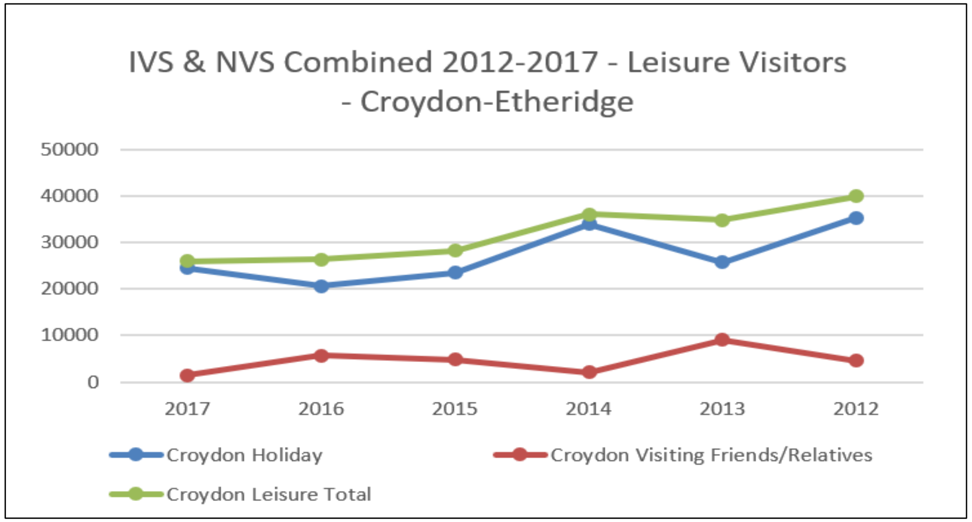


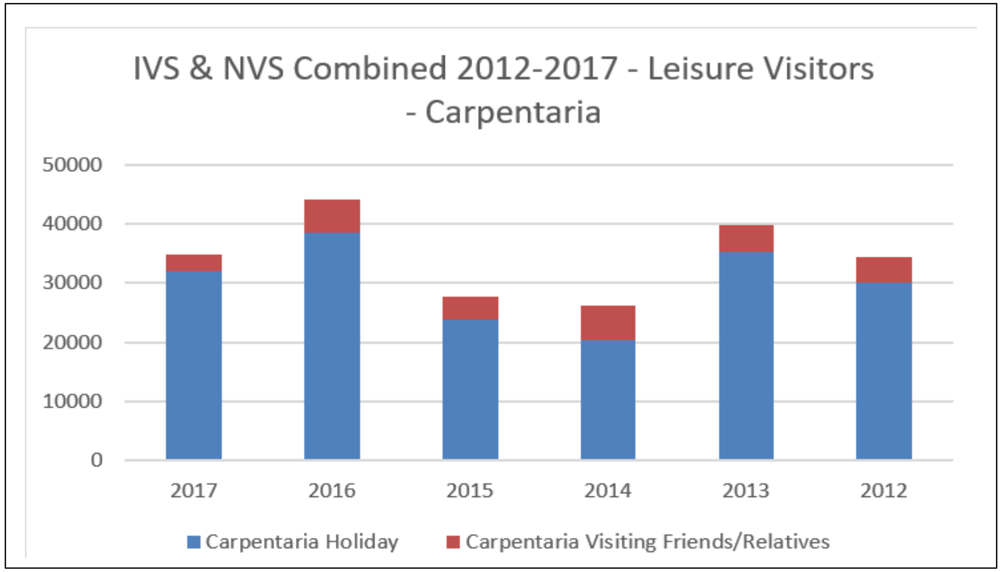


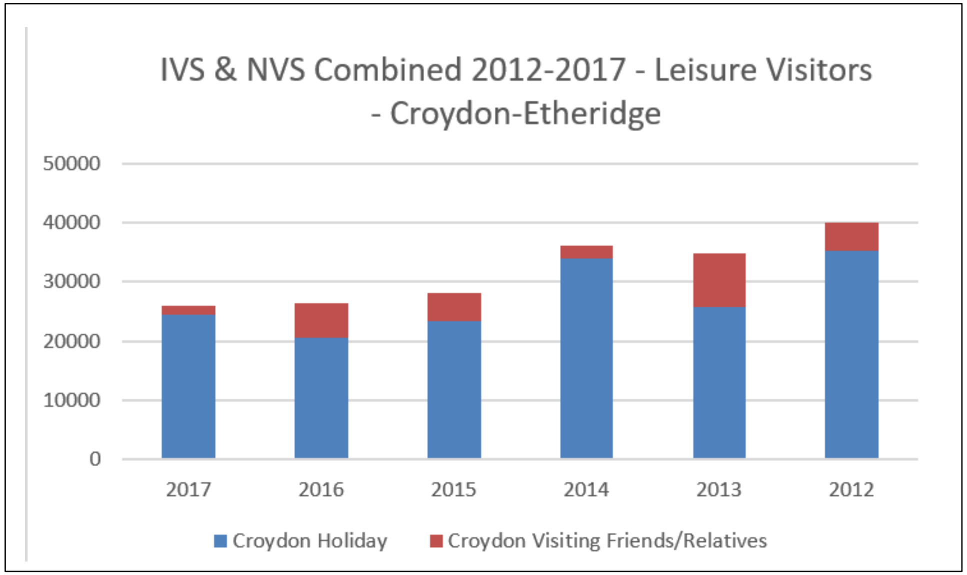
LEISURE TRAVEL – IVS & NVS COMBINED 2012-2017

The below data is a combination of IVS and NVS data identifying “Leisure” travellers to the Gulf Savannah region, a combination of those who travel for the purposes of “Holiday” and to “Visit friends or relatives”. Averaged over a six-year period, Carpentaria records around 34,546 leisure visitations per year and Croydon-Etheridge receives around 31,903 leisure visitors per year.









ACTIVITY TYPE – 2017 GSD SURVEY

The 2017 Survey sought feedback on a range of activities that visitors had participated in. The Survey question also sought feedback on the level of interest in activities that are either not offered as yet, or not widely offered/advertised. The order of the activities in the table below is based on a Large-Small ranking from the "Very Interested (if offered)" category, to provide readers with a sense of where the greatest unmet interest appears to be.

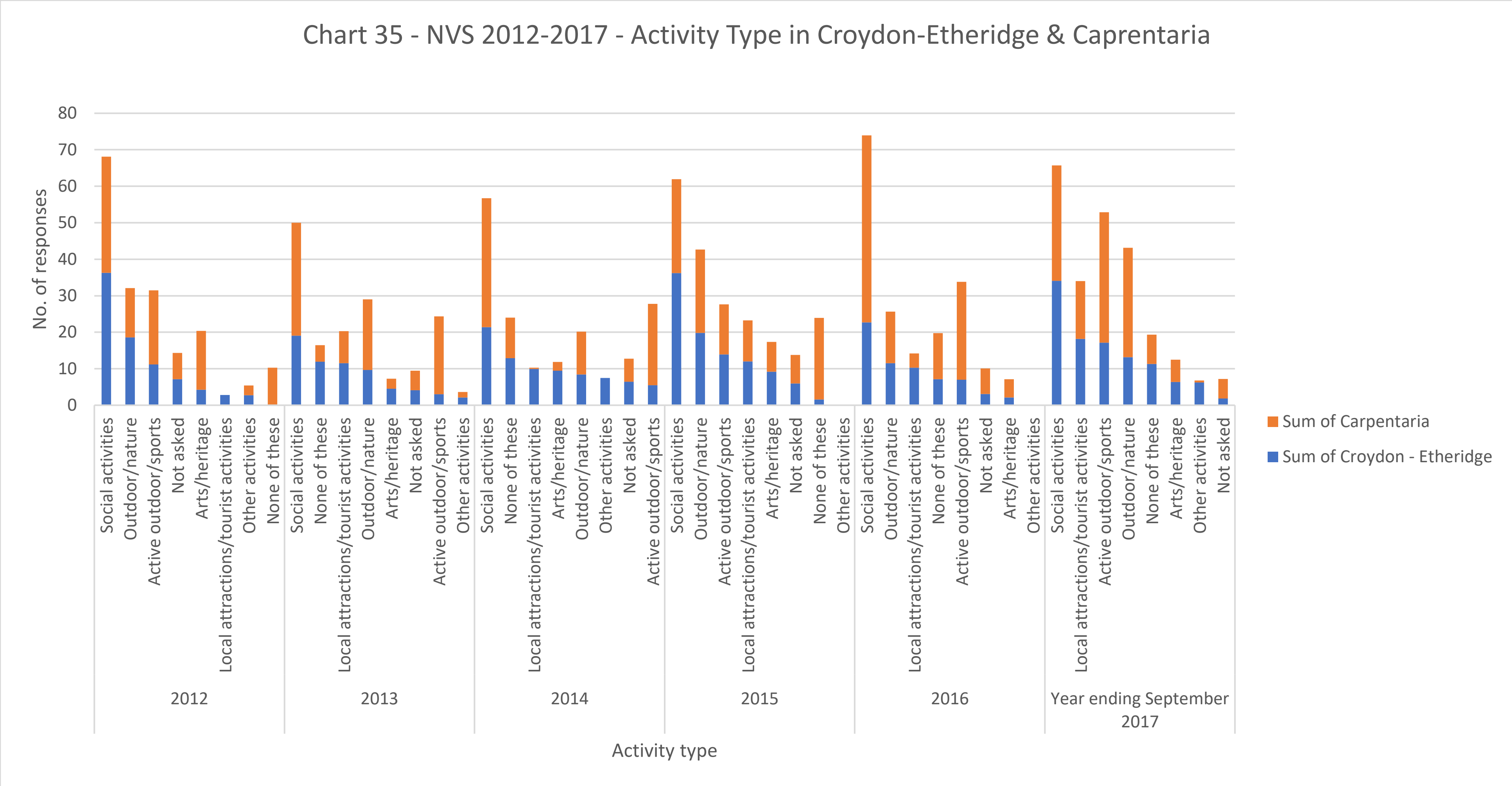
TABLE 3: Activity Types

Activity	I/We Did It!	Very Interested (if offered)	A bit interested (depends on price)	Not interested
Cattle Station Tours	15.38%	53.85%	23.08%	7.69%
Mineral Bath experience	24.39%	53.66%	12.20%	9.76%
Bush Tucker Tours	19.51%	48.78%	14.63%	17.07%
Farm Stays	10.81%	45.95%	24.32%	18.92%
Bands/Music on the Salt Pans	5.13%	43.59%	20.51%	30.77%
Podcasts about the Region	13.89%	38.89%	16.67%	30.56%
Bird Watching Tours	10.26%	38.46%	30.77%	20.51%
Houseboat Hire	5.41%	37.84%	21.62%	35.14%
Aerial Tours & Joy Flights	23.68%	36.84%	28.95%	10.53%
Star Gazing / Salt Pans	20.51%	35.90%	33.33%	10.26%
Crocodile Farm	13.16%	34.21%	18.42%	34.21%
Crocodile Spotting Tours	43.90%	34.15%	4.88%	17.07%
Fishing Charter Ocean	35.56%	31.11%	17.78%	15.56%
Fishing Charter River	30.77%	30.77%	17.95%	20.51%
Historical Township Tours	41.86%	30.23%	20.93%	6.98%
Fossil Tours	23.68%	28.95%	26.32%	21.05%

- Highest participation rate: Historical Township Tours
- Highest "Very Interested if offered": Cattle Station Tours
- Lowest "Not Interested": Historical Township Tours
- Biggest gap between "Very Interested" and "Not Interested": Cattle Station Tours. Followed by Mineral Bath experience.
- Most common activities: water-based activities including Fishing Charters and Croc Spotting Tours.

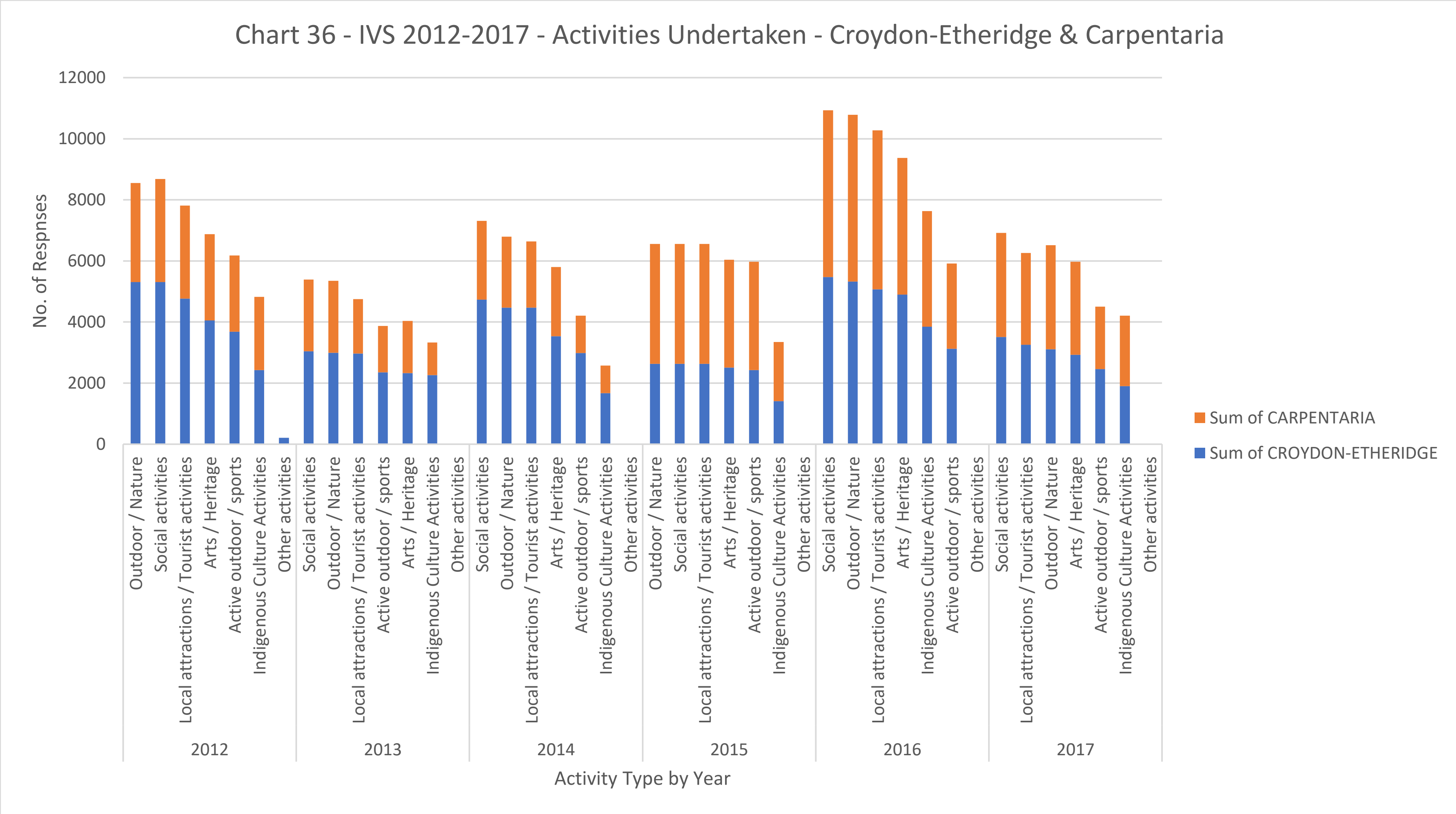
ACTIVITY TYPE – NVS 2012-2017

As per the National Visitor Survey data from 2012-2017, “Social Activities” remain the most popular “Activity Type”, with “Active Outdoor/Sports” challenging for the most popular Activity Type in 2017 in Carpentaria. Social Activities include: visiting friends/relatives, heading to the pub/club/disco/casino, shopping, eating out, sightseeing and so forth. “Active Outdoor/Sports” includes: fishing, surfing, snorkelling, scuba diving, snow-skiing and so forth…so mostly just fishing in the Gulf Savannah region.



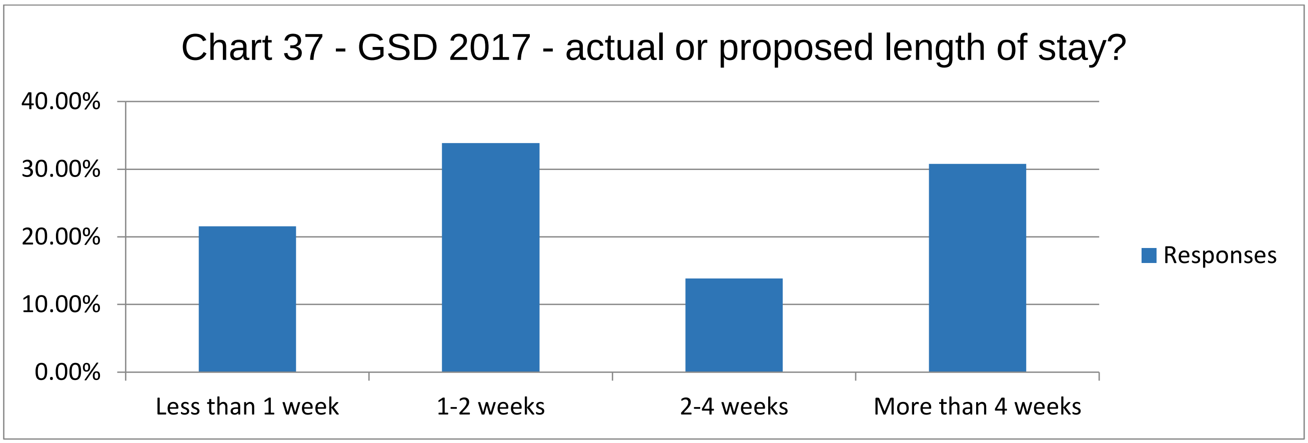
ACTIVITY TYPE – IVS 2012-2017

The IVS survey results from 2012-2017 approximate those from the domestic survey, though the popularity of "Outdoor Activity/Sports" displaces the popularity of "Social Activities" from year to year. In addition, visiting "local attractions" receives a proportionally higher response rate among international visitors relative to domestic visitors.



LENGTH OF STAY – GSD SURVEY – IVS AND NVS SURVEYS

The 2012 Survey identified an average length of stay of 11.5 days. The 2017 Survey returned an average length of stay of 13.98 days, though this average reduced to 8.82 days when figures for those staying 100+ days in the region were removed.

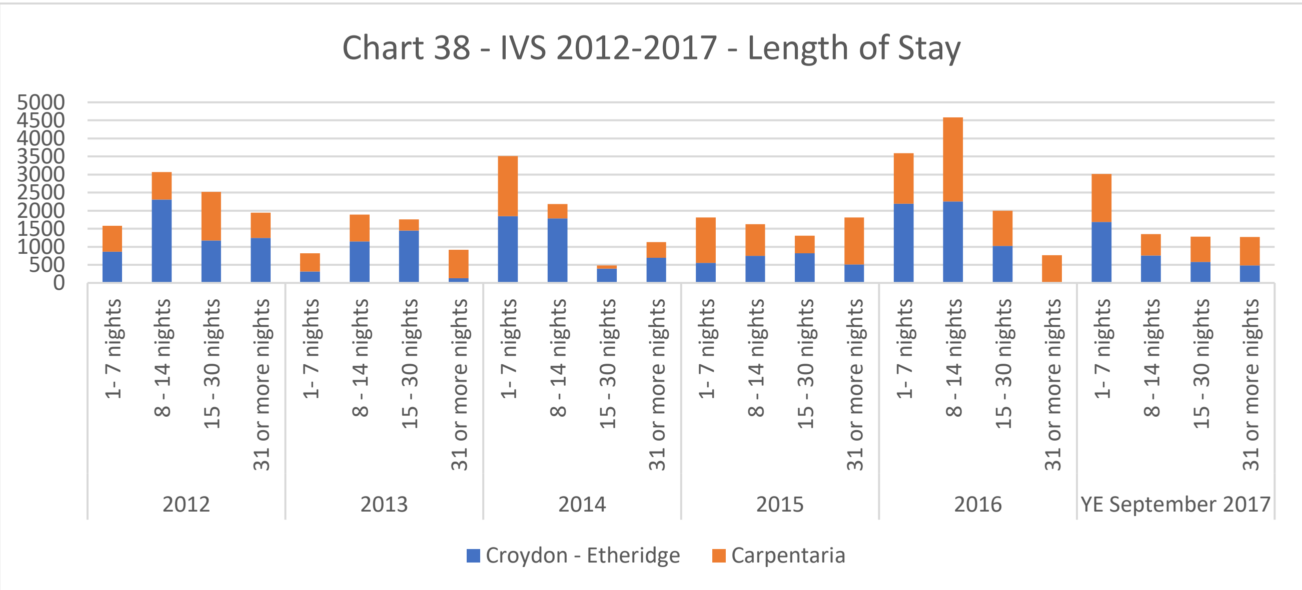


For international visitors to the region, the indicative average length of stay from IVS data was generally higher than the NVS average (see Table 5) and higher than the 2012 (11.5) and 2017 GSD Surveys (13.98):

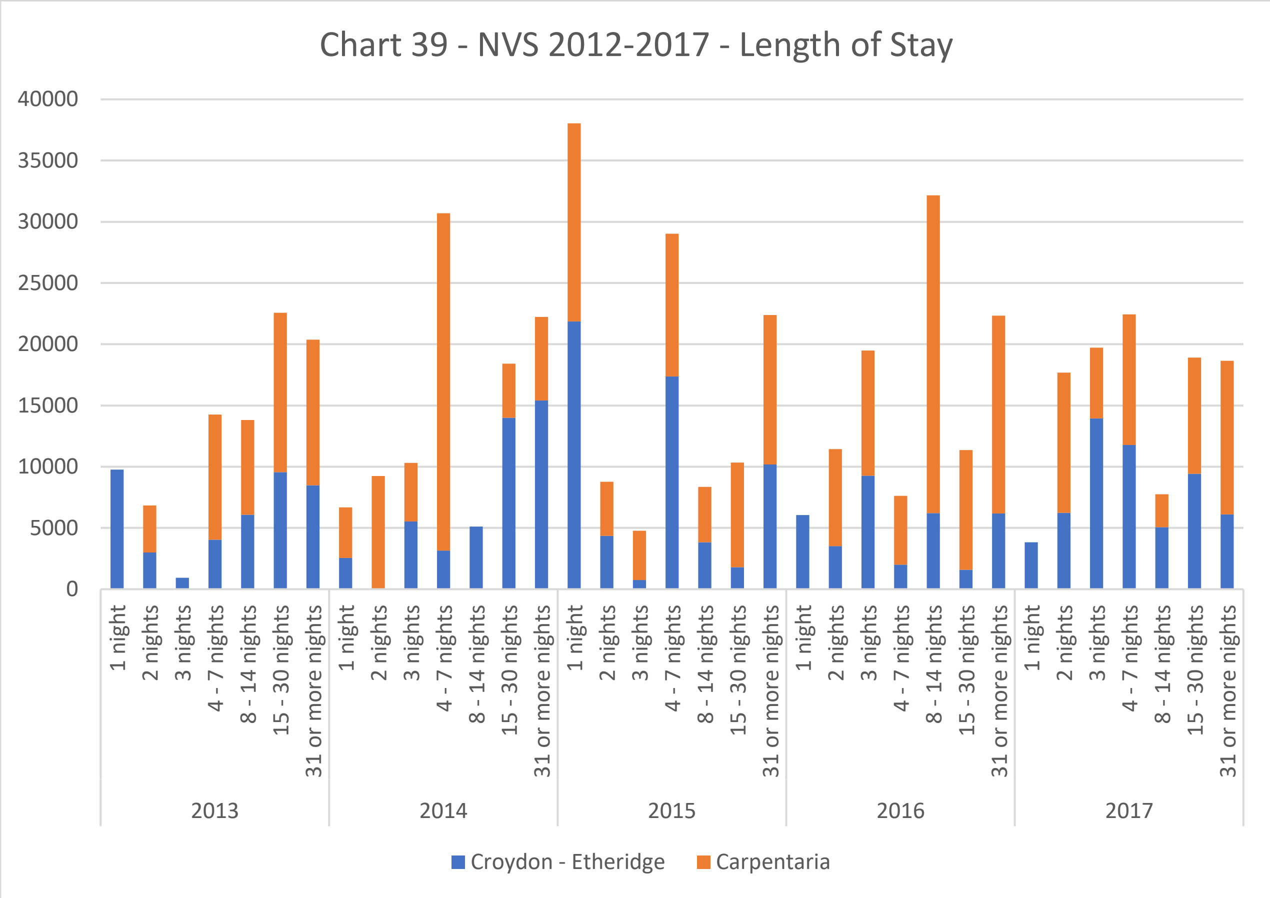
	IVS 2012-2017 – Average Length of Stay of International Visitors to the Gulf Savannah						
TABLE 4	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**Combined**
Croydon-Etheridge	16.79	16.61	12.19	16.99	10.35	12.31	14.21
Carpentaria	17.92	17.69	10.00	16.84	14.05	15.23	15.32

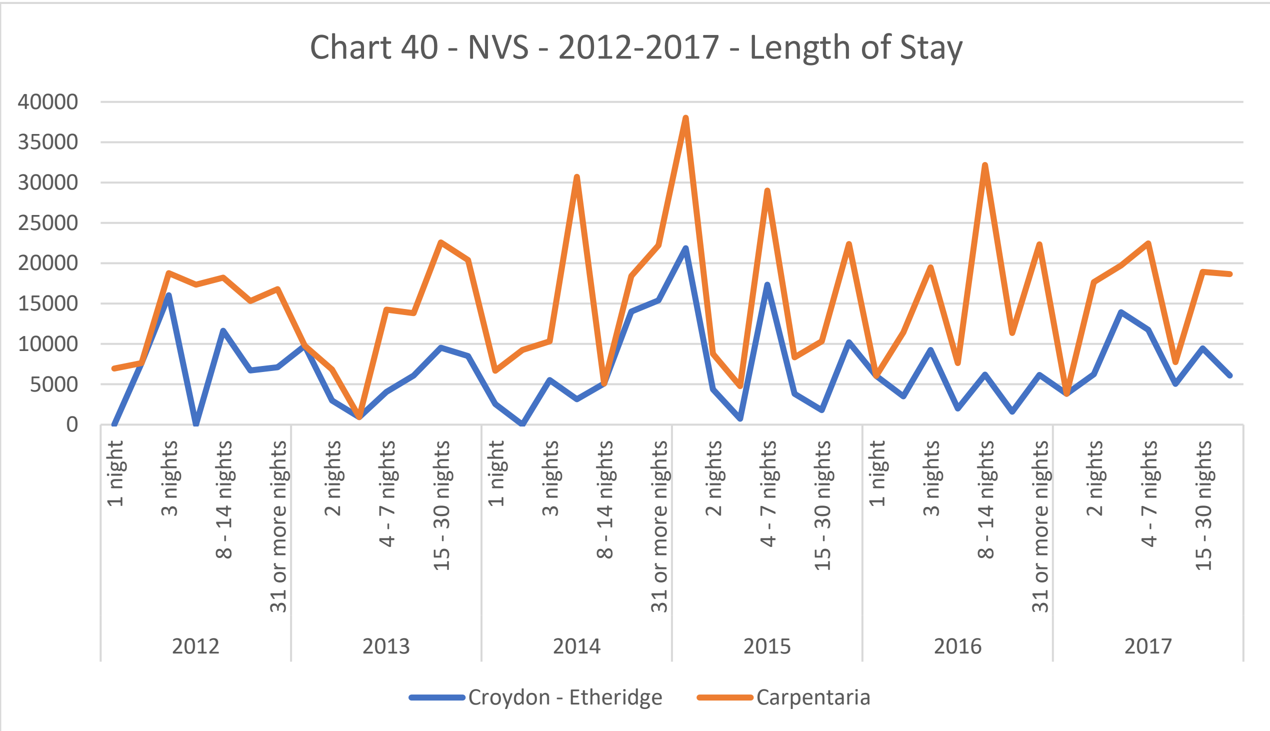
National Visitor Survey from 2012-2017 has been used to generate indicative average lengths of stay for:

	NVS 2012-2017 – Average Length of Stay of Domestic Visitors to the Gulf Savannah						
TABLE 5	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**Combined**
Croydon-Etheridge	11.46	13.99	19.34	8.76	9.97	10.28	12.3
Carpentaria	13.04	17.35	8.76	11.71	14.33	13.89	13.18



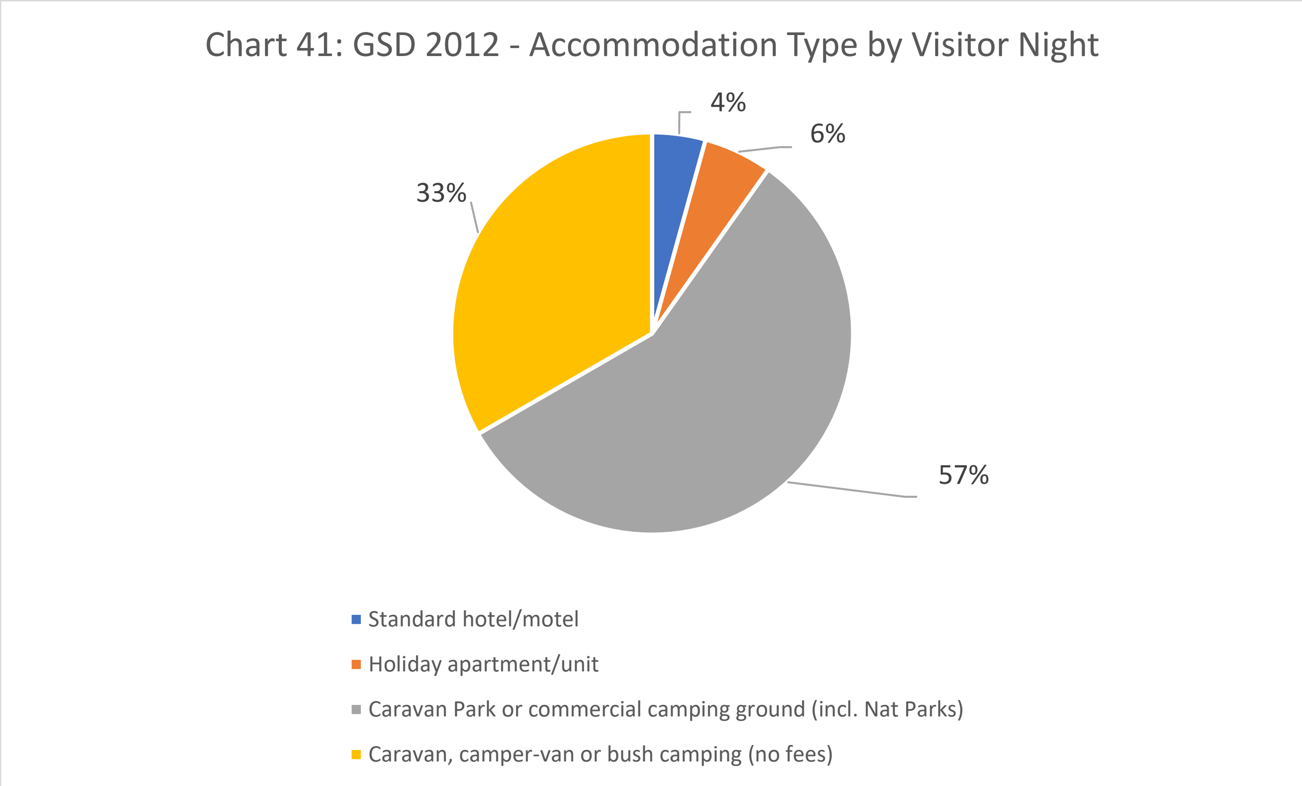
LENGTH OF STAY – NVS 2012-2017

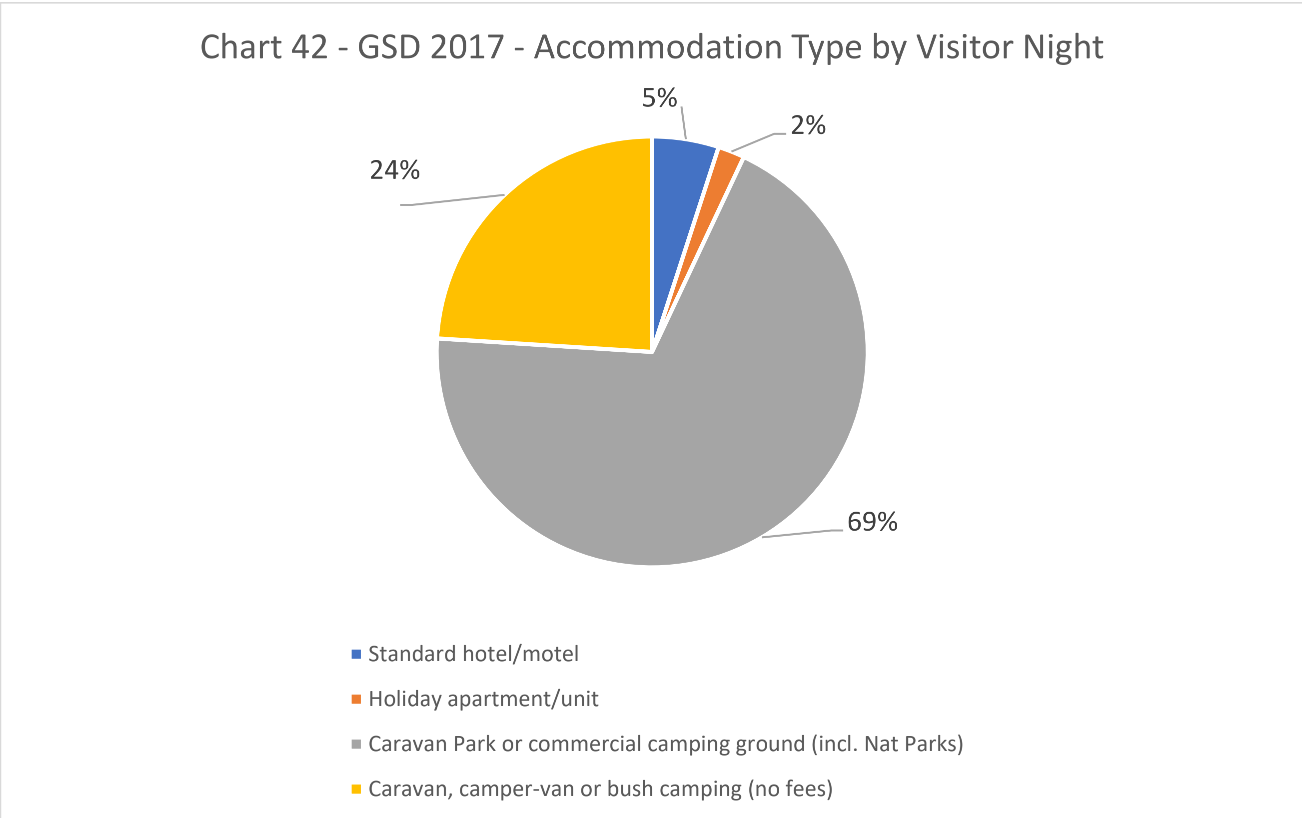




GSD 2012 & 2017 - ACCOMMODATION TYPE BY VISITOR NIGHTS

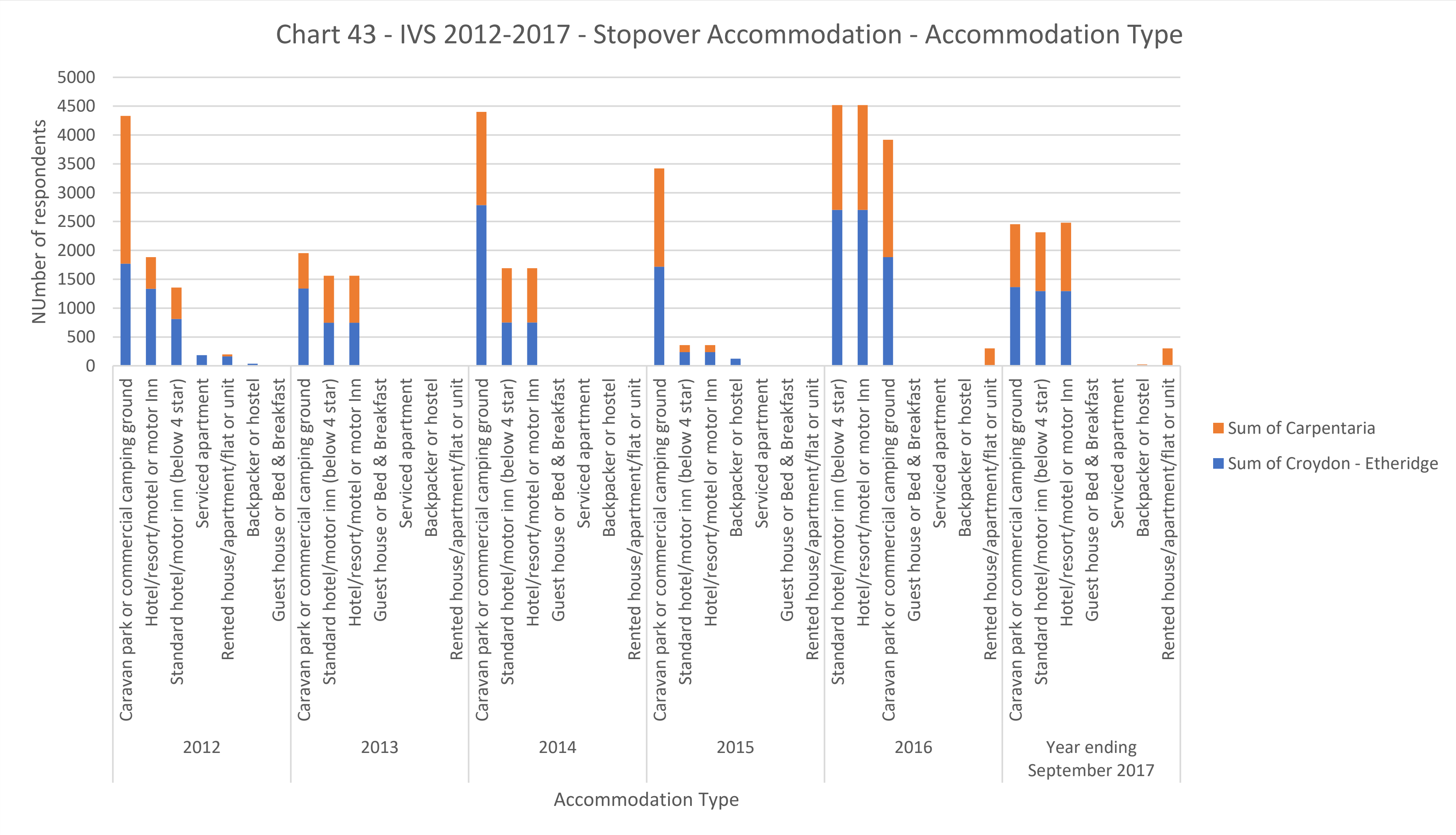
The 2012 GSD Survey identified a higher number of persons accessing free-camping locations than in the 2017 Survey (33% as opposed to 24%). A roughly equivalent increase in visitor nights in fee-paying caravan parks/sites was evidenced in 2017. The significant reduction in free-camping in/around Burketown may help to explain this shift as would the provision of additional low-cost (but not free) RV sites in the region.





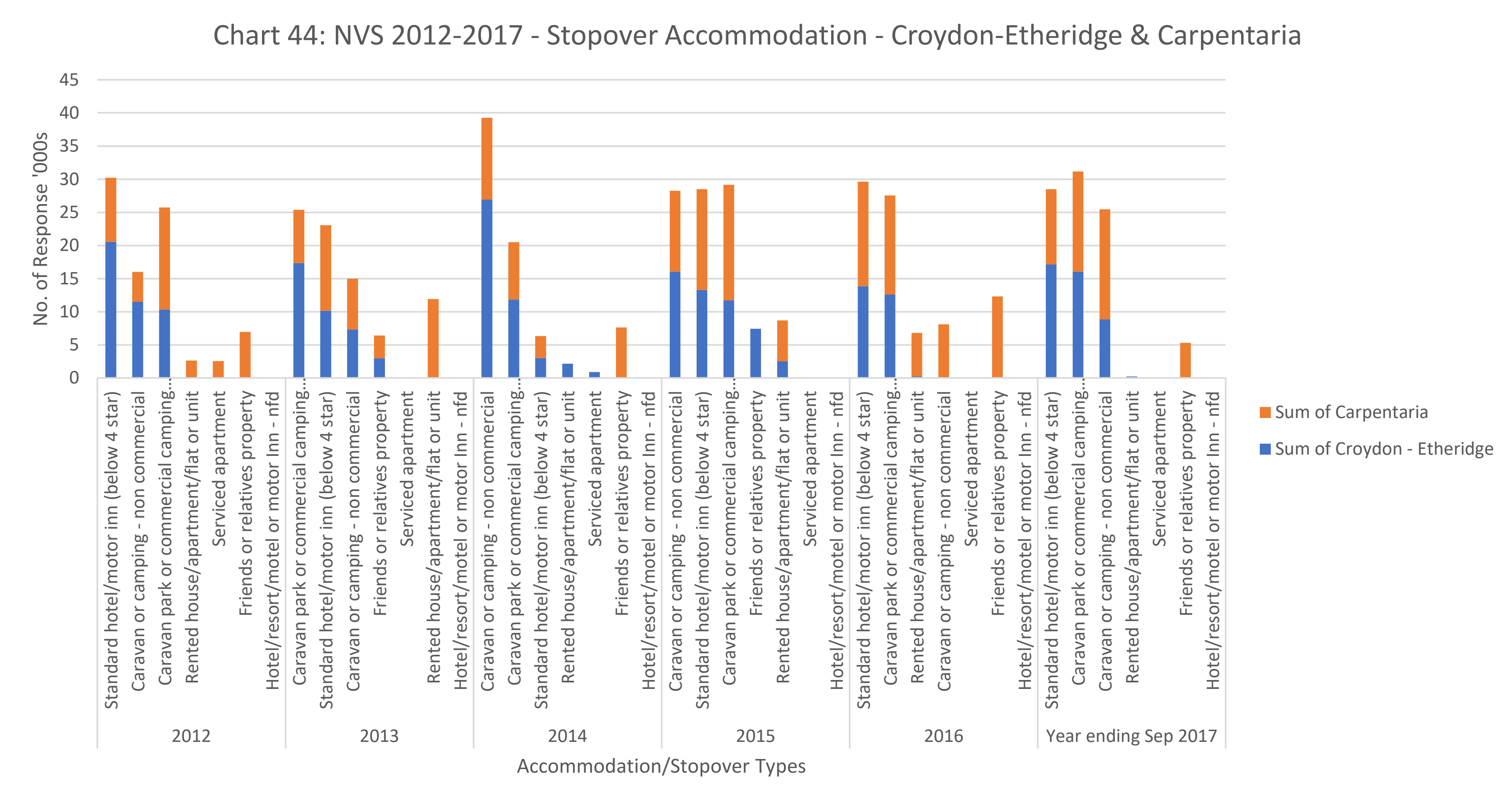
ACCOMMODATION TYPE – IVS 2012-2017

IVS data indicates that the majority of international visitors to Carpentaria stay in caravan parks of commerical camping grounds, while in Croydon-Etheridge, international visitors are also likely to be accessing a range of other accommodation types: hotel/motel/cabin type rooms.



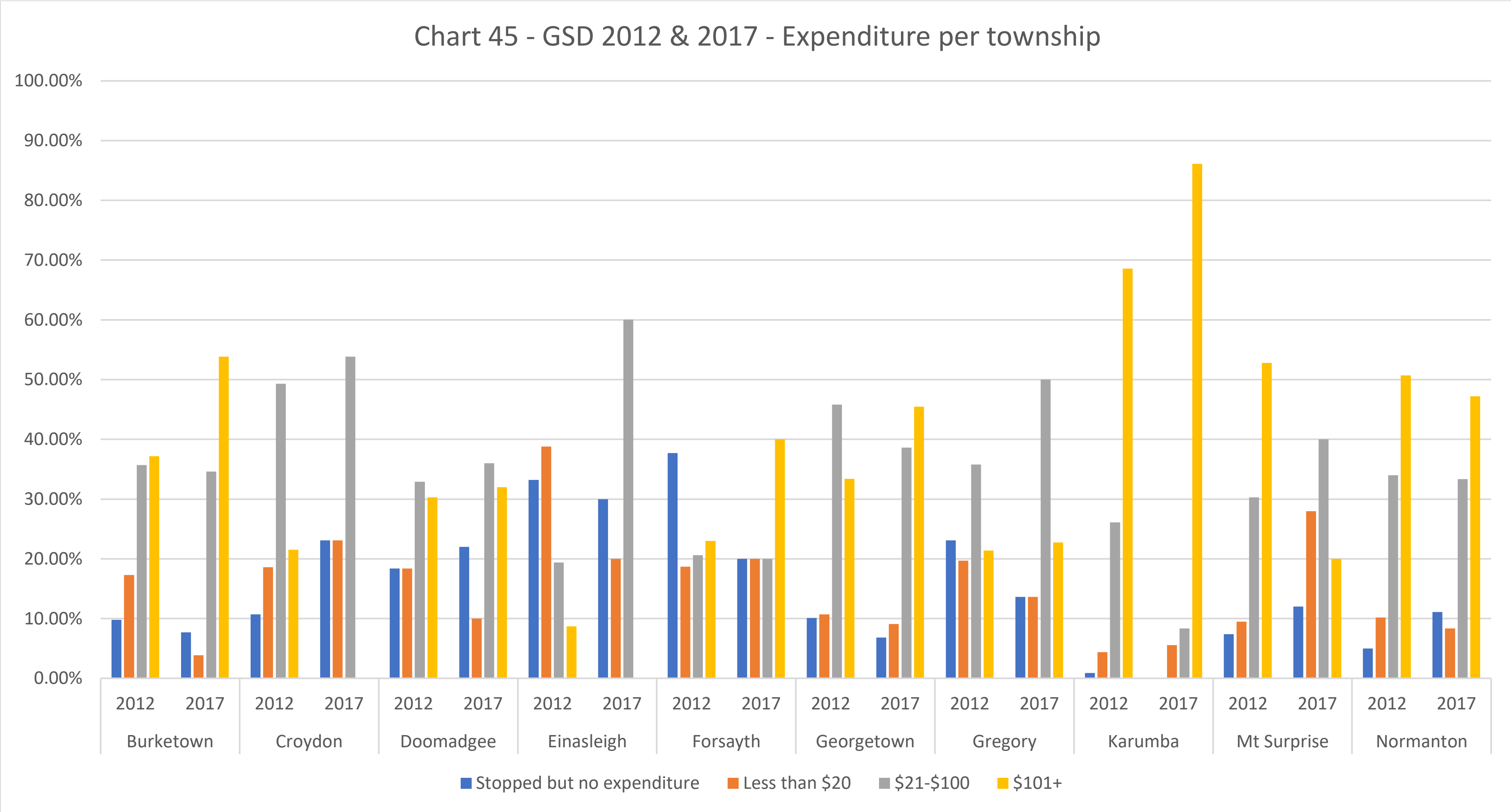
ACCOMMODATION TYPE – NATIONAL VISITOR SURVEY – 2012-2017

NVS Stopover Accommodation data from 2012-2017 reflects IVS data for the same time period, with higher numbers of respondents accessing commercial and non-commercial caravan parks and camping grounds in Carpentaria than in Etheridge. This should come as little surprise given differences in stock. Motels, hotels, huts, cabins and dongas were also popular across all survey years with the exception of 2014.



GSD 2012 & 2017 – EXPENDITURE PER TOWNSHIP

Survey respondents were also asked in which towns they spent money. As with the 2012 survey, the township best able to capture the leisure visitor dollar was Karumba. In 2012, 68.6% of visitors to Karumba spent $100 or more and in 2017, 86.11% of visitors to Karumba spent $100 or more. Burketown registered an increase in visitor expenditure, which may be linked to the increase in the number of tours and activities available to visitors to Burketown offered by Yagurli Tours.



GSD 2012 & 2017 - AVERAGE WEEKLY EXPENDITURE – PER PERSON / PER ITEM

In the Chart below, 2012 average weekly expenditures are compared with 2017 average weekly expenditures. While there appears to have been little change/growth in accommodation revenue and expenditure on fuel/vehicle/maintenance between the two surveys, additional expenditure in 2017 was recorded for groceries, meals and drinks and tours and attractions.

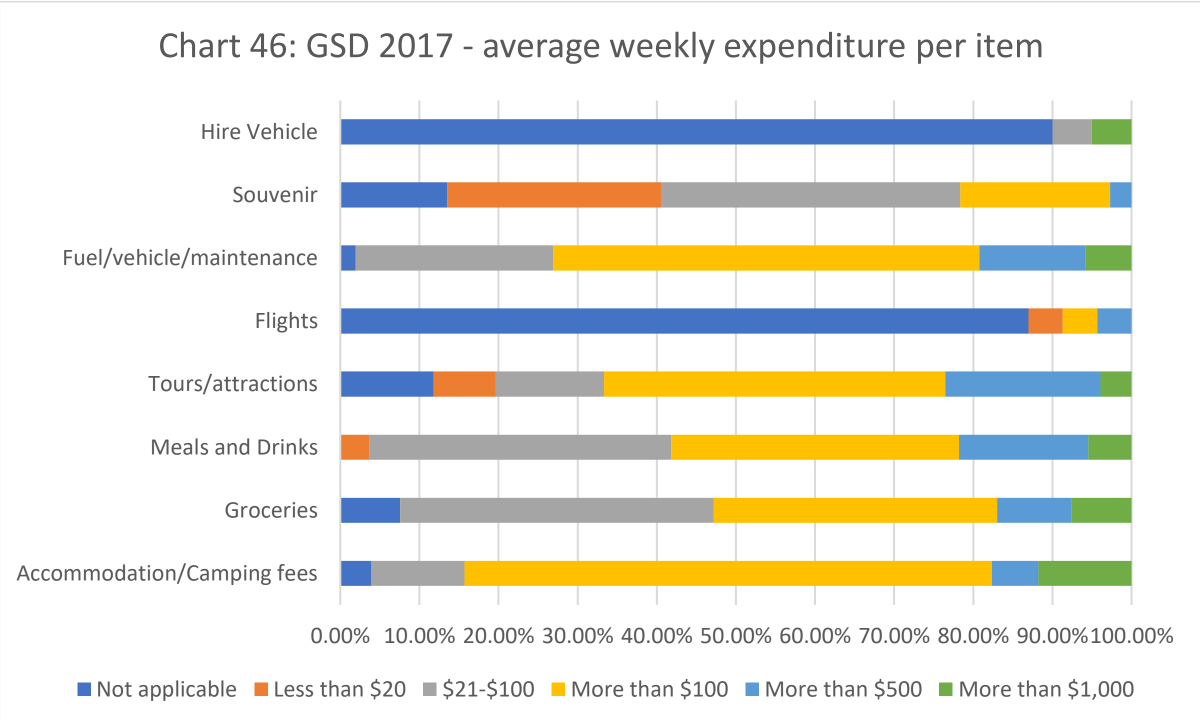
This translates to $94.02 per person per day of expenditure in 2017 as opposed to $79.11 per person per day in 2012, a difference of $14.91 per day.

With each visitor staying 13.98 days on average in 2017, the 2017 survey suggests average visitor expenditure of $1,314.40 per person. This can be compared with the 2012 figure of $909.76 per person, which is based on an average stay of 11.5 days at $79.11 spent per person per day.

TABLE 6
Average Visitor Expenditure per item (per person, per week) - GSD 2012 & 2017

	Accommodation and Camping	Groceries	Meals and Drinks	Tours and Attractions	Fuel, Vehicle & Maintenance	Souvenir	Hire Vehicle	Other	Total
2012	$146.08	$55.60	$72.09	$98.70	$137.22	$20.27	$19.54	$4.30	$553.80
2017	$149.61	$68.47	$125.19	$126.70	$137.37	$24.26	$26.51	$0.00	$658.11

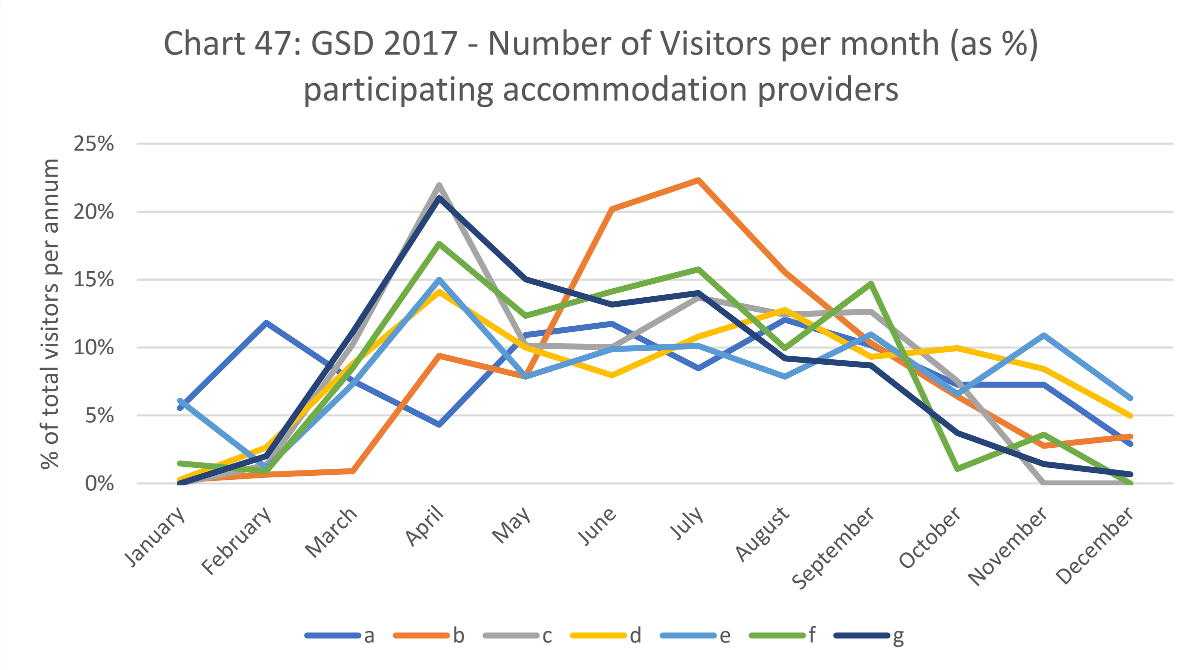
The chart below identifies average weekly expenditure per item for the 2017 survey in terms of the proportion of respondents in each expenditure bracket (<$20, $21-$100, $100+, $500+, $1,000+).



HOW DOES VISITATION CHANGE DURING THE YEAR?

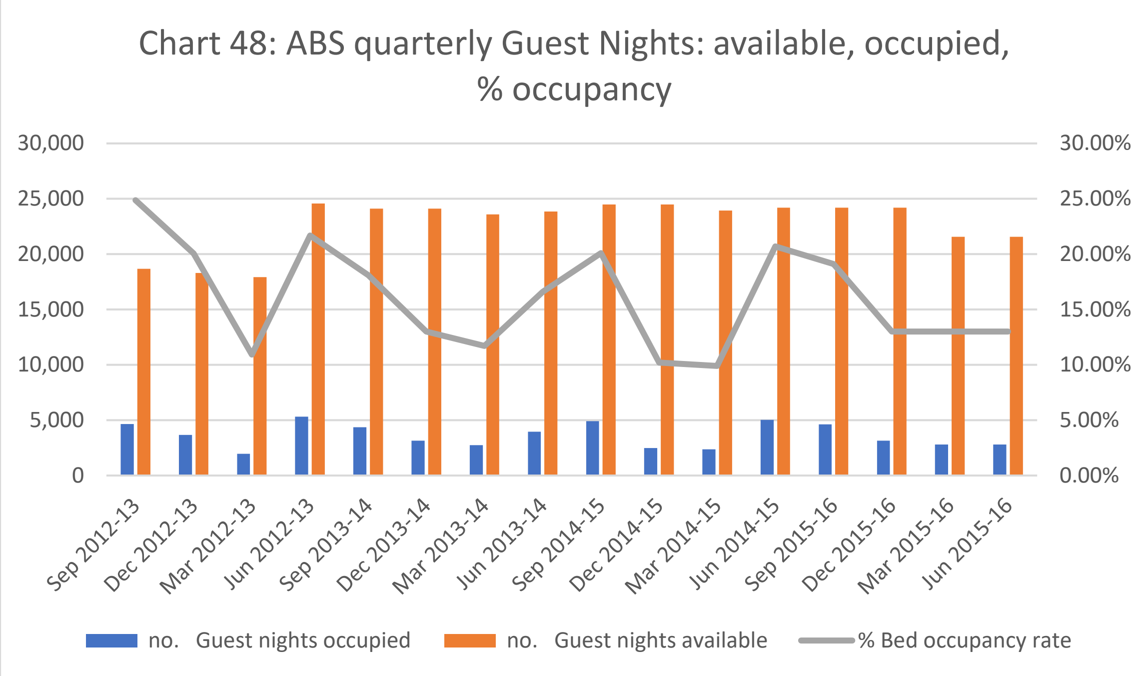
Please see below for sample visitation rates for different accommodation providers (kept anonymous) who participated in an accommodation survey in 2017. The chart is based on Total Visitors per/night, per/month. In order to maintain anonymity, the monthly totals have been converted into percentages.

As will be seen, some businesses are able to navigate the shoulder seasons more effectively than other businesses (Line A, Line E). Spikes can be seen in April for the traditional beginning of the tourism season with occupancy rates steadier during the middle of the year before dropping away from September.



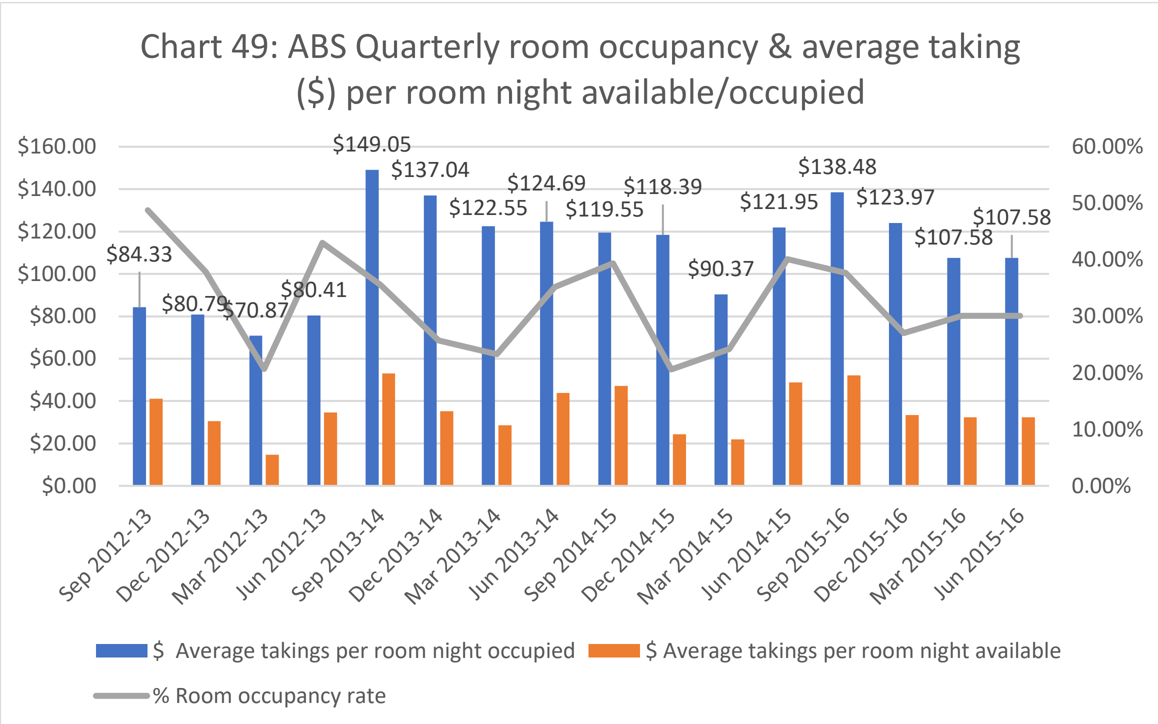
ABS ROOM DATA

The information provided below relates to ABS 8635.0 Tourist Accommodation survey (conducted quarterly), which looks at accommodation providers (hotels, motels, guest houses, serviced apartments) with 15 or more rooms. This relates to four (4) businesses in Carpentaria and one (1) in Croydon-Etheridge. Figures for the latter are not included in the ABS survey for reasons of privacy.

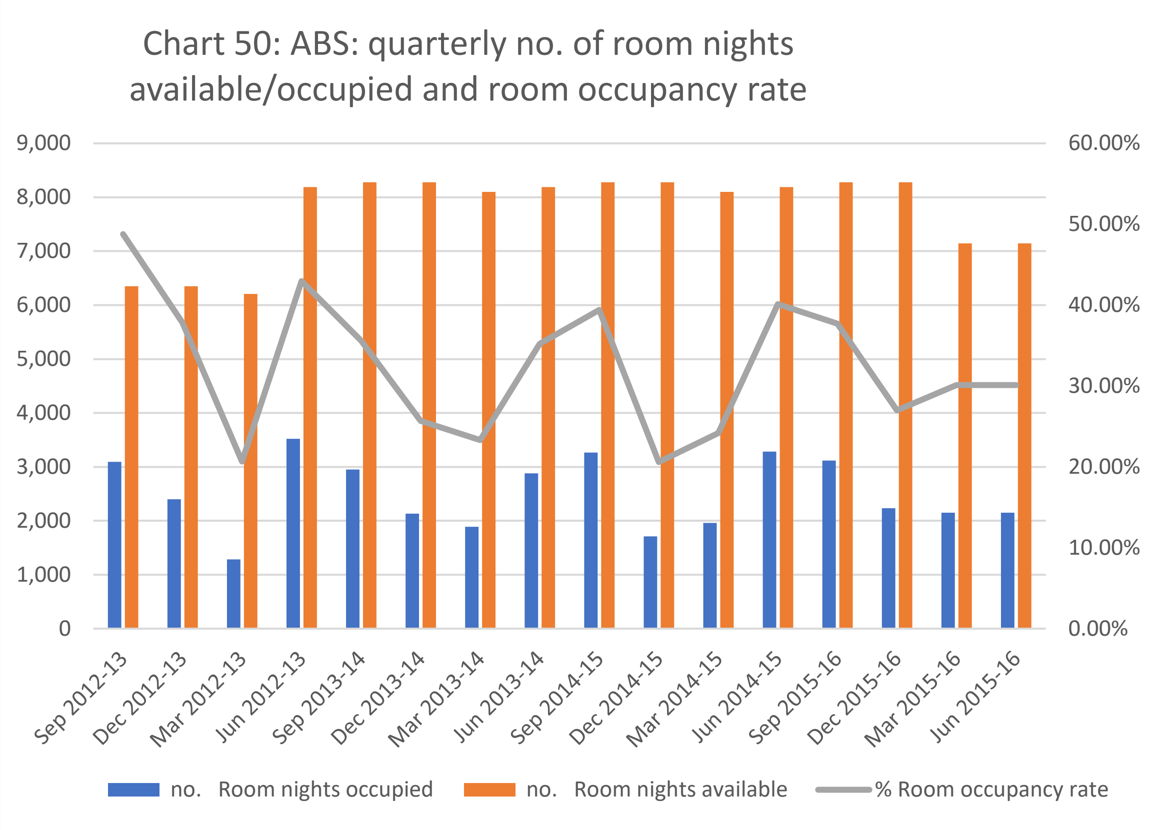


ABS CONTINUED

As can be seen in the previous chart and the chart below, bed occupancy and room occupancy rates during Jun-Jul-Aug quarter and the Mar-Apr-May quarter. These trends for the larger accommodation providers also typify the accommodation sector in the Gulf Savannah. The highest average $p/night takings were in Jun-Jul-Aug quarter of September 2013 ($149.05), down to $138.48 p/night in the corresponding quarter for 2015. More recent data is not yet available from the ABS.



The chart below again highlights peak occupancy rates of 40% taking place during the Jun-Jul-Aug quarter.



VISITOR SATISFACTION – ACTIVITY-BASED

The 2012 Survey asked respondents to rate their satisfaction with specific aspects of their visit to the Gulf Savannah. The results between the two Surveys are contrasted in the tables below. Cells shaded "light green" indicate a higher % result for that category in a particular year. For example, the cell for "Very Satisfied" for "Roads" in 2017 is shaded light green (10.94%), while the corresponding cell for 2012 is not shaded (8.10%). As you will note, the 2012 survey responses evidenced greater degrees of "Overall Satisfaction" than in 2017. The 2017 survey responses evidenced a greater return of "Not Applicable" or "Neither Satisfied nor Dissatisfied" results than 2012, as well as more "Overall Dissatisfaction.

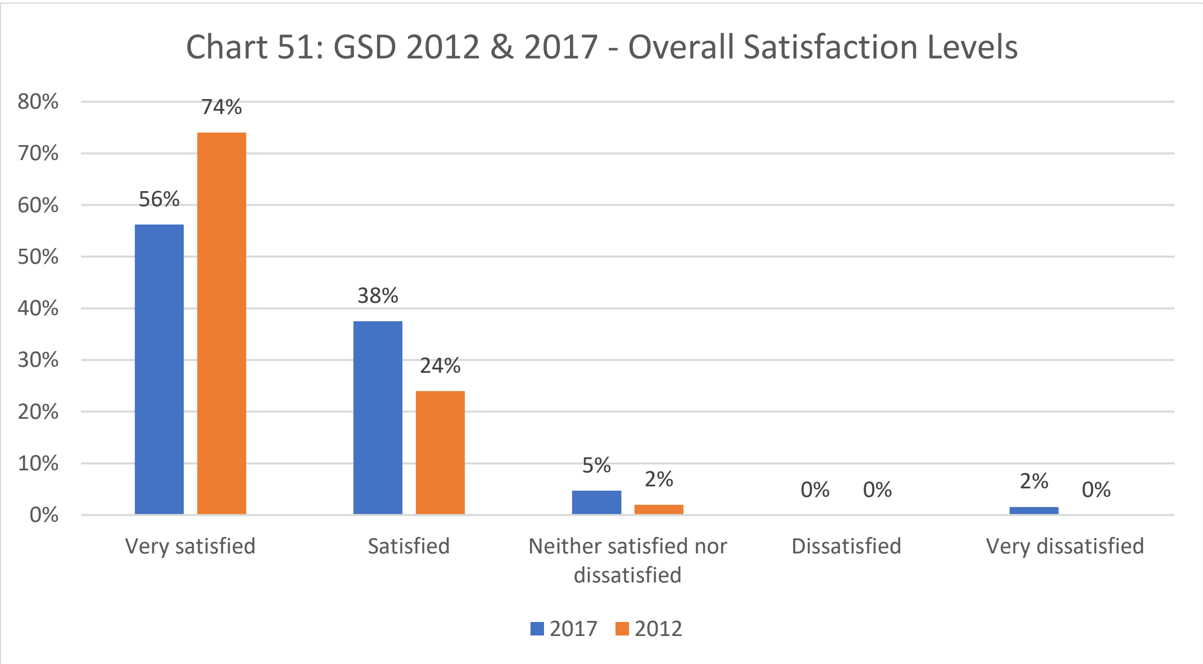
TABLE 7	**2017**				
Item/Activity	**Overall Satisfied**	**Very satisfied**	**Overall dissatisfied**	**Very dissatisfied**	**NA/Neither**
Commercial accommodation	51.51%	30.30%	18.18%	9.09%	30.31%
Caravan Parks	76.79%	37.50%	10.72%	5.36%	12.49%
Food and beverage	77.20%	35.09%	10.52%	1.75%	12.28%
Telecoms/Internet/Wi-Fi	25.81%	4.84%	48.39%	25.81%	25.80%
Roads	42.19%	10.94%	42.19%	20.31%	15.62%
Tours/charters	54.90%	31.37%	13.72%	5.88%	31.38%
Information Signage	69.36%	25.81%	14.52%	4.84%	16.12%
Visitor Information Centres	77.78%	49.21%	6.34%	3.17%	15.88%
Friendliness of locals	89.06%	51.56%	9.37%	1.56%	1.57%
Customer service	82.26%	32.26%	8.06%	1.61%	9.68%
Variety of things to see and do	85.94%	40.63%	10.94%	4.69%	3.12%
Personal safety and security	86.16%	43.08%	10.77%	6.15%	3.07%
Public toilets	67.74%	27.42%	8.06%	1.61%	24.20%

TABLE 8	2012				
Item/Activity	**Overall Satisfied**	**Very satisfied**	**Overall dissatisfied**	**Very dissatisfied**	**NA/Neither**
Commercial accommodation	89.70%	49.00%	1.90%	2.60%	8.40%
Caravan Parks	94.50%	56.80%	1.00%	2.20%	4.50%
Food and beverage	90.90%	41.60%	0.60%	2.40%	8.50%
Telecoms/Internet/Wi-Fi	42.40%	12.90%	40.90%	15.00%	16.70%
Roads	68.50%	8.10%	13.70%	2.90%	17.80%
Tours/charters	94.20%	64.60%	2.40%	0.90%	3.40%
Information Signage	80.10%	27.10%	8.70%	1.80%	11.20%
Visitor Information Centres	95.10%	67.70%	1.80%	0.70%	3.10%
Friendliness of locals	97.20%	72.20%	0.80%	0.50%	2.00%
Customer service	95.20%	61.40%	1.00%	0.50%	3.80%
Variety of things to see and do	94.70%	57.80%	0.80%	0.30%	4.50%
Personal safety and security	95.80%	56.50%	0.70%	0.30%	3.50%
Public toilets	87.30%	37.50%	3.70%	0.60%	9.00%

While the above results suggests some attention is required to lift overall satisfaction ratings at the Activity level, results between 2012 and 2017 were fairly similar when it came to overall satisfaction (see over page).

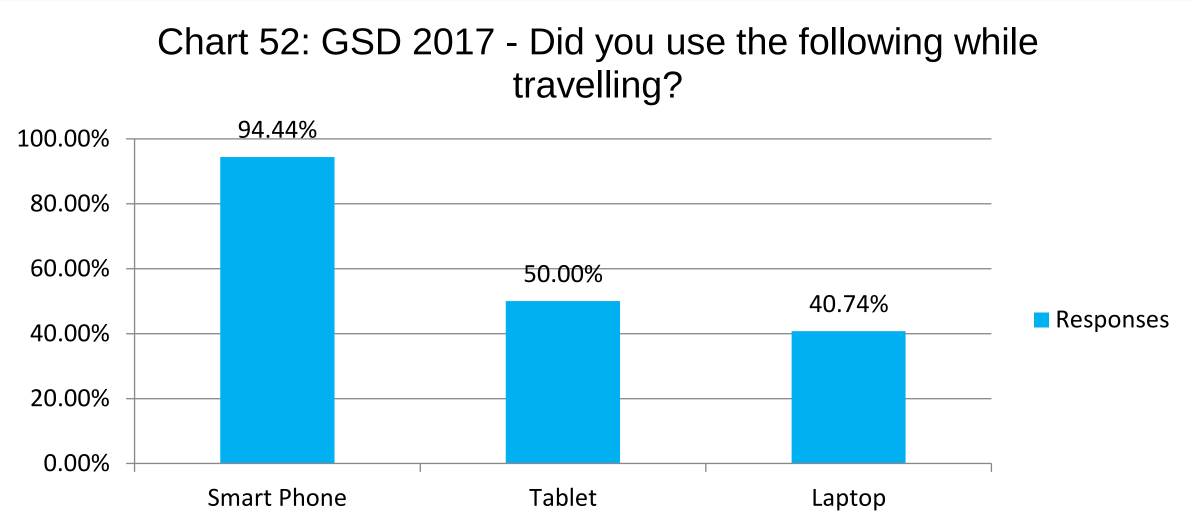
GSD 2012 & 2017 – VISITOR SATISFACTION OVERALL

In spite of the higher numbers of respondents identifying as "dissatisfied" of individual items/activities in 2017, this had very little/no bearing on the overall satisfaction levels of visitors to the Gulf Savannah region. There was, as can be seen in the chart below, a substantial reduction in the "Very Satisfied" levels between 2012 (74%) and 2017 (56%).

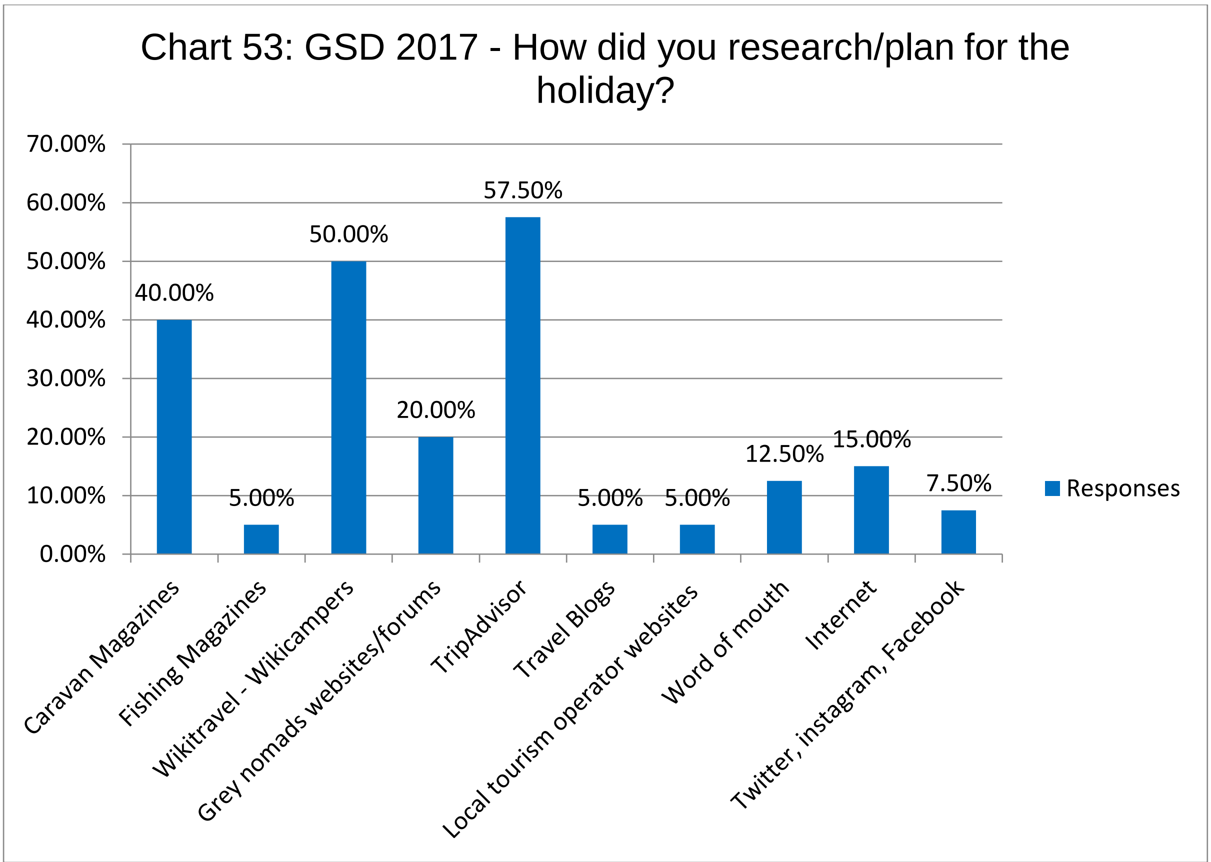


TELECOMS, INTERNET, SMART DEVICES

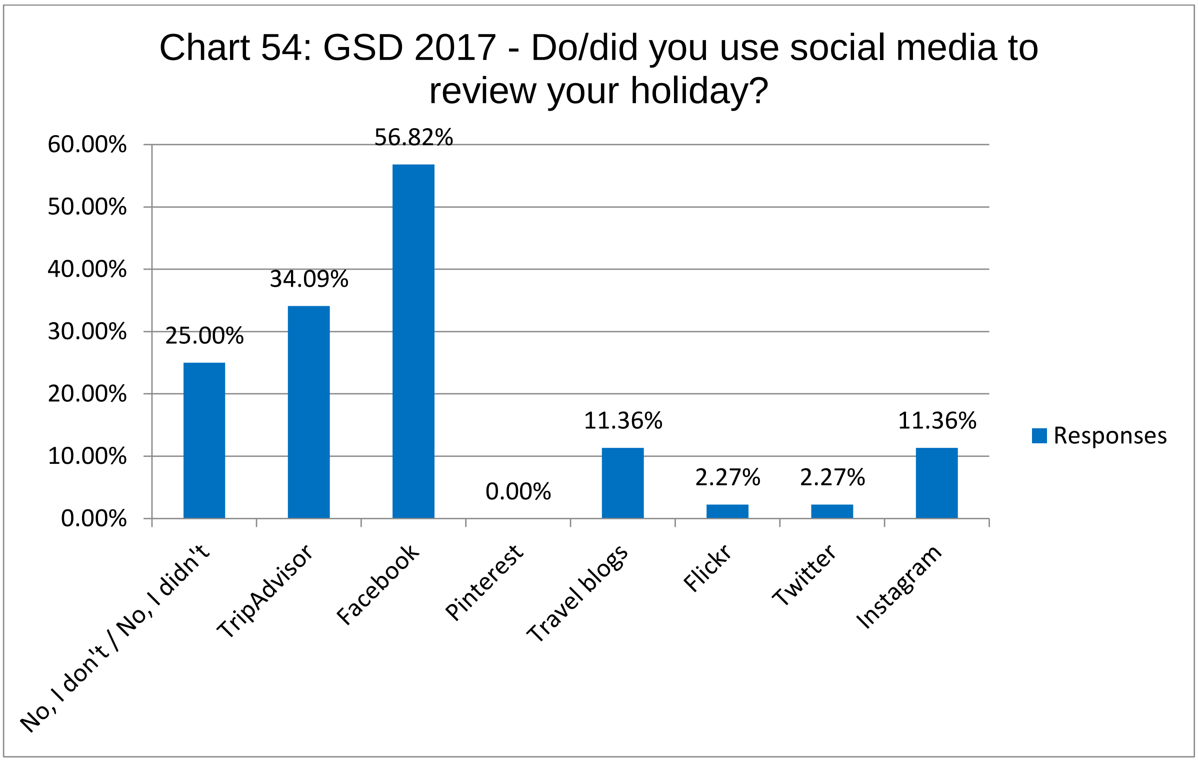
The 2017 GSD Survey replaced a series of work-related questions with three questions seeking information on the use of digital devices/platforms while researching and reviewing travel and while undertaking travel itself. In so doing, the aim was to provide stakeholders with hard data to back up what appears to be common practice among tourists generally and among tourists to the Gulf Savannah region.



The above suggests the importance of Gulf Savannah Apps, business webpages, booking sites etc., need to be mobile enabled in order to effectively communicate with visitors to the region.



The above chart illustrates the sources of information that visitors access in order research and plan their holidays. Digital platforms were the most popular, although very few visitors to the Gulf identified the webpages of local tourism providers as sites of interest. The results for TripAdvisor and Wikicamps suggest the importance to businesses of managing their profile on these sites as best as they are able.



The above chart identifies an interesting pattern of research behaviour vs review behaviour, with TripAdvisor as the dominant RESEARCH TOOL, while Facebook is used as the predominant REVIEW TOOL. 25% of respondents did not use social media to review their travel experience.

APPENDIX 1 – DTMR TRAFFIC COUNT DATA – ANNUAL AVERAGE DAILY TRAFFIC AND % HEAVY VEHICLE TRAFFIC

ROAD	Location	SITE ID	2016 AADT	2015 AADT	2014 AADT	2013 AADT	2012 AADT	2016 %HV	2015 %HV	2014 %HV	2013 %HV	2012 %HV
Barkly Highway (Cloncurry - Mount Isa)	This traffic data was collected at: WiM Site Cloncurry and represents this segment.	100021	923	839	1142	1142	1142	30.02	28.46	28.53	28.53	28.53
Barkly Highway (Mt Isa - Camooweal)	This traffic data was collected at: Mount Isa Airport and represents this segment.	100065	3475	3475	5028	5028	5028	13.25	13.25	10.59	10.59	10.59
Barkly Highway (Mt Isa - Camooweal)	This traffic data was collected at: 50km west of Mt Isa (W of Gunpowder Int) and repre sents this segment.	100006	569	545	502	475	436	44.3	47	41.81	35.76	30.95
Barkly Highway (Mt Isa - Camooweal)	This traffic data was collected at: 1km west of Thorntonia T/O and represents this segment.	100067	372	385	269	269	269	25.01	24.2	41.59	41.59	41.59
Burke Development Road (Cloncurry-Normanton)	This traffic data was collected at: 5km North of Butchers Creek and represents this segment.	100026	297	238	223	266	239	27.25	29.06	30.88	28.23	26.39
Burke Development Road (Cloncurry-Normanton)	This traffic data was collected at: 0.5km north of Burke and Wills Junction and repres ents this segment.	100008	115	100	78	78	78	26.45	29.12	14.14	14.14	14.14
Burke Developmental Road (Normanton-Dumbullah)	This traffic data was collected at: 500m North of Melville Creek and represents this segment.	100028	268	272	275	276	260	24.15	18.81	19.25	16.36	13.27
Burke Developmental Road (Normanton-Dumbullah)	This traffic data was collected at: Rocky Creek Floodway and represents this segment	100072	30	34	42	36	31	28.05	30.31	30.98	26.16	24.87
Flinders Highway (Charters Towers - Hughenden)	This traffic data was collected at: Hughenden - East Town Area and represents this segment.	100055	658	636	539	539	539	28.62	34.08	24.24	24.24	24.24
Flinders Highway (Charters Towers - Hughenden)	This traffic data was collected at: 2.1 km east of Torrens Creek bridge and represents this segment.	100107	537	529	587	560	506	35.79	35.36	34.43	38.07	35.25
Flinders Highway (Hughenden to Richmond)	This traffic data was collected at: 17.22km west of Hughenden and represents this segment.	100148	437	395	0	0	0	35.43	35	0	0	0
Flinders Highway (Julia Creek to Cloncurry)	This traffic data was collected at: 10km East of Cloncurry and represents this segment .	100052	691	824	863	863	832	38.75	25.95	31.04	29.57	30.96
Flinders Highway (Julia Creek to Cloncurry)	This traffic data was collected at: 2km east of Landsborough Hwy and represents this s egment.	100005	369	356	402	402	383	39.89	40.25	41.25	35.38	33.85
Flinders Highway (Richmond - Julia Creek)	This traffic data was collected at: Spellary Creek and represents this segment.	100019	381	365	385	385	353	48.22	47.87	37.87	38.12	36.82
Forsayth Road	This traffic data was collected at: Reservoir Hill (W of Georgetown) and represents th is segment.	110572	122	156	136	116	128	20.13	21.28	20.8	18.46	17.85
Gregory Developmental Road (Charters Towers - Lynd)	This traffic data was collected at: Mannings Flat - Gregory Dev. Rd. and represents th is segment.	111505	178	164	185	179	169	31.55	35.75	29.3	29.29	37.03
Gregory Developmental Road (The Lynd-Quartz Blow CK)	This traffic data was collected at: N.D.Creek - Gregory Dev. Rd. and represents this s egment.	111506	36	36	35	36	92	26.69	29.71	26.62	26.62	64

ROAD	Location	SITE ID	2016 AADT	2015 AADT	2014 AADT	2013 AADT	2012 AADT	2016 %HV	2015 %HV	2014 %HV	2013 %HV	2012 %HV
Gregory Developmental Road (The Lynd-Quartz Blow CK)	This traffic data was collected at: Carroll's Creek - (Gulf Dev End) and represents this segment.	111495	15	17	15	19	19	25.46	31.97	35.22	18.72	18.72
Gregory to Camooweal Road	This traffic data was collected at: North of Thorntonia - Yelvertoft T/O and represent s this segment.	100078	43	45	45	48	45	13.57	14.04	12.32	12.05	12.52
Gregory to Camooweal Road	This traffic data was collected at: South of Thorntonia - Yelvertoft T/O and represent s this segment.	100079	16	14	33	33	33	21.64	37.87	13.83	13.83	13.83
Gulf Developmental Road (Croydon-Georgetown)	This traffic data was collected at: Gulf Devel.Rd, west of Chinamans Ck and represents this segment.	110068	254	221	218	215	214	31.88	31.44	22.94	25.25	23.21
Gulf Developmental Road (Georgetown-Mt Garnet)	This traffic data was collected at: 100m east of Undara T/O and represents this segment.	111637	296	298	312	294	0	22.5	26.49	20.44	22.54	0
Gulf Developmental Road (Georgetown-Mt Garnet)	This traffic data was collected at: Georgetown PC- 100m East of Forsayth Rd and repres ents this segment.	110034	282	277	294	320	0	29.07	29.01	27.24	27.12	0
Gulf Developmental Road (Normanton-Croydon)	This traffic data was collected at: Belmore Creek and represents this segment.	111504	174	153	153	153	150	32.49	23.46	23.46	23.46	17.7
Gulf Developmental Road (Normanton-Croydon)	This traffic data was collected at: Twenty Mile Creek and represents this segment.	100010	145	143	122	0	0	28.38	28.95	26.18	0	0
Karumba Developmental Road	This traffic data was collected at: South of Karumba Point T/O and represents this seg ment.	100108	649	649	787	787	787	19.44	19.44	10.19	10.19	10.19
Karumba Developmental Road	This traffic data was collected at: 2km West of Karumba T/O and represents this segment.	100025	250	241	237	242	235	29.32	22.75	23.46	27.78	24.25
Kennedy Developmental Road (Mt Garnet - The Lynd)	This traffic data was collected at: WiM Site 40 Mile Scrub and represents this segment.	111605	221	154	230	252	256	20.77	23.73	22.72	21.31	25.14
Kennedy Developmental Road (Mt Garnet - The Lynd)	This traffic data was collected at: Kennedy Develop.Rd, 100m sth of Gulf Dev and repre sents this segment.	110066	180	201	187	193	153	30.97	40.7	43.92	25.96	34.94
Kennedy Developmental Road (The Lynd-Hughenden)	This traffic data was collected at: 26.6k north of Hughenden and represents this segment.	100157	80	61	0	0	0	21.94	23.13	0	0	0
Kennedy Developmental Road (The Lynd-Hughenden)	This traffic data was collected at: McKinnons Creek and represents this segment.	110626	60	62	69	92	67	31.85	32.32	25.18	31.63	55.53
Kennedy Developmental Road (The Lynd-Hughenden)	This traffic data was collected at: Pine Tree Creek and represents this segment.	100110	32	27	25	25	25	27.28	27.68	26.33	26.33	26.33
Wills Developmental Road	This traffic data was collected at:13km west of Burke & Wills Roadhouse and represents this segment.	100023	79	152	91	115	92	26.97	35.67	34.1	30.56	29.67
Wills Developmental Road	This traffic data was collected at: Box culvert North of Doomadgee T/O and represents this segment.	100024	64	73	52	92	61	33.25	21.76	37.58	36.55	28.62
Wills Developmental Road	This traffic data was collected at: Dismal Creek Channels and represents this segment.	100038	30	8	8	8	8	36	51.12	51.12	51.12	51.12

APPENDIX 2 - THE 2017 SURVEY

Gulf Savannah Tourism Survey 2017

Your experience matters. Your opinion counts

Dear Visitor

The Gulf Savannah is a pretty awesome place and we want to make it even better for visitors like yourself.

You can help by completing this brief visitor survey form. It should only take 10 minutes and everyone who completes the form will have an opportunity to win **$1,500 worth of Gulf Savannah adventures** (accommodation, transport, activities anywhere in the Gulf).

We are particularly interested in what you liked and what you didn't like about your time in the Gulf Savannah. All surveys are confidential and you don't need to give your name or address. But we do appreciate honest opinions and feedback – the good, the bad and even the ugly!

We'd love to capture information toward the end of your visit to the Gulf Savannah so that your responses cover your whole experience with us. The Gulf Savannah is defined as per the coloured sections of the map below.

If you have any queries please contact the Gulf Savannah Development office on 0400 728 141 or ceo@gulf-savannah.com.au. We are the regional development agency for the Gulf, supported by local Councils, and our partner in this survey is Savannah Way Limited who promote and market the Savannah Way adventure drive from Cairns through the Gulf and across to Broome.

Thanks for taking time to help us with this survey and we look forward to welcoming you back into the Gulf Savannah in future years.

Cr Ernie Camp, Chair GSD

Russell Boswell, Savannah Way Limited

SECTION ONE: ABOUT YOU

1. Date: _______________

2. Location where you completed this form: ________________________

3. Where do you usually live? Australia (post code): ___________ Overseas (country): _______________

4. Which of these best describes your immediate travel party? Please tick

☐ Alone ☐ Couple (partner/spouse) ☐ Tour group ☐ Club
☐ Friends ☐ Family with children ☐ Relatives

5. Total number in travel party? ___________________

6. Age group and gender of the travel party?

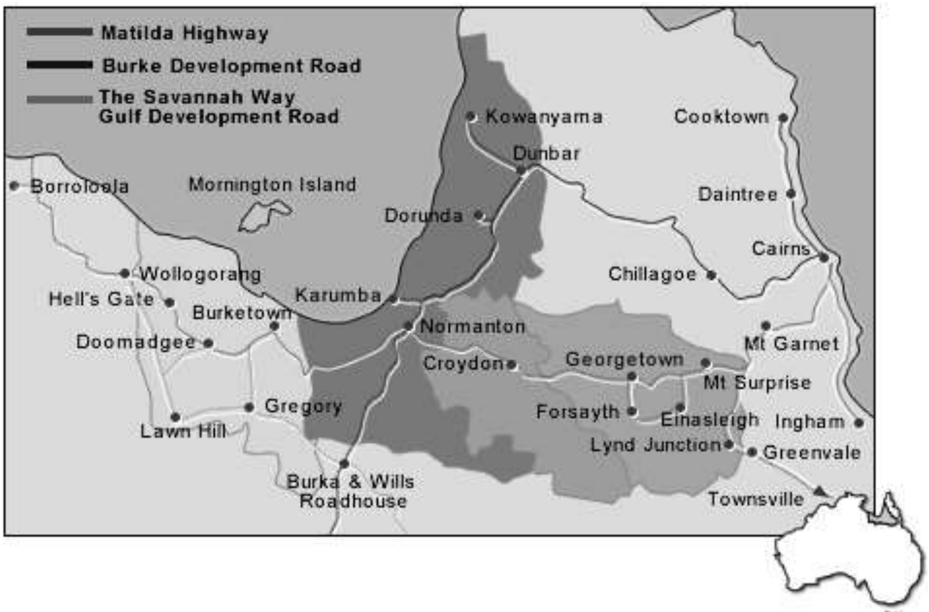
	Age	№	Female	Male
#	Under 20			
#	20-29			
#	30-39			
#	40-49			
#	50-59			
#	60-65			
#	Over 65			

7. Primary purposes for visiting?

Visit friends/family ☐
Event-specific (e.g. rodeo, festival) ☐
Activity-specific (e.g. fishing, fossils) ☐
Location-specific (Cobold, Undara, Adels) ☐
Driving the Savannah Way – partial ☐
Driving the Savannah Way – whole thing ☐
General holiday (combination of the above) ☐
Other/More detail……………………………………

8. Please indicate your primary mode of transport to travel AROUND the Gulf Savannah?
Private/rented 4WD? Private/rented 4WD and caravan? Private/rented campervan? Motorcycle? Aircraft? Sedan? Bicycle?

9. Please indicate your travel route on the map below, using (x) as the entry point to the Gulf Savannah and (y) as the exit:



10. Is this your first visit to the Gulf Savannah region?

☐ Yes ☐ No If *No*, how many times have you visited? _________

11. Actual or proposed length of stay?

☐ Less than 1 week ☐ 1-2 weeks ☐ 2-4 weeks ☐ More than 4 weeks

12. Approximately how many nights will you spend in each of the following? Please place a number in the box.

Standard hotel / motel	
Apartment / unit	
Caravan park or commercial camping ground (incl. Nat Parks)	
Caravan, campervan or bush camping (no fees)	
Other (friends, family)	
Total nights in the Gulf Savannah	

13. How satisfied or dissatisfied are you with….

	Very dissatisfied	Fairly dissatisfied	Neither satisfied nor dissatisfied	Fairly satisfied	Very satisfied
Commercial Accommodation……………………….	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Caravan Park ………………………………………	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Food and beverage………………………………..	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Telecoms/Internet/Wi-Fi………………………………	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Roads ………………………………………………..	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Tours/charters……………………………….. ……	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Information Signage………………………………………..	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Visitor Information Centres………………………….	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Friendliness of locals……… … ………………	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Customer service in shops/pubs/restaurants……………	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Public infrastructure (roads, pontoons, jetties) ………..….	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Local atmosphere……… …………………………	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Variety of things to see and do…………………	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Personal safety and security……………………..	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
Public toilets…………………………….	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5

14. Overall, how satisfied or dissatisfied were you with your Gulf Savannah experience? Please Tick

- Very satisfied ☐
- Satisfied ☐
- Neither satisfied or dissatisfied ☐
- Dissatisfied ☐
- Very dissatisfied ☐

15. How would you best describe your employment status? Please tick

☐ Full-time ☐ Part-time ☐ Retired ☐ Student ☐ Other:

16. How would you best describe your annual income: (Please choose only one)

☐ Less than $5,000 ☐ $5,000-$25,000 ☐ $25,000-$45,000 ☐ $45,000-$65,000
☐ $65,000-$85,000 ☐ $85,000-$100,000 ☐ $100,000+

17. Approximately how much did you or your travel party spend in each of the following towns? Please specify if your response covers:

Just you ☐
Travel party ☐

Township	Didn't stop	Stopped but no expenditure	Less than $20	$21 - $100	More than $100	More than $1,000
Burketown						
Croydon						
Doomadgee						
Einasleigh						
Forsayth						
Georgetown						
Gregory						
Karumba						
Mt Surprise						
Normanton						

18. On average, how much did you or your travel party spend PER WEEK while in the Gulf on the following?

Just you ☐
Travel party ☐

Accommodation/Camping fees	$
Groceries	$
Meals and Drinks	$
Tours/attractions	$
Flights	$
Fuel/vehicle/maintenance	$
Souvenir	$
Hire vehicle	$

19. Tours and attractions. Did you go on any of the following? Did you wish some of the following *were* offered? Please let us know.

	I/we did it!		Interested	Maybe	Not interested
Star gazing / night on the salt pans					
Music / bands on the salt pans					
Fossil tours					
Podcasts for the Region					
Bird Watching tours					
Mineral Baths experiences					
Aerial tours: helicopter/aircraft					
Fishing charter ocean					
Fishing charter river					
Farm stays					
Croc spotting tours					
Croc Farm tours					
Cattle station tours					
Tours of historical sites/buildings					
Bush tucker tours					
Houseboat Hire					

20. Did you use the following while travelling?

Smart phone ☐ Tablet ☐ Laptop ☐

21. What kind of social media do you normally use when researching/planning your holiday?

○ TripAdvisor ○ Facebook ○ Pinterest ○ Travel blogs

○ Flickr ○ Twitter ○ Instagram ○ Other:

22. Do/Did you use social media to review your holiday?

○ TripAdvisor ○ Facebook ○ Pinterest ○ Travel blogs

○ Flickr ○ Twitter ○ Instagram ○ Other:

23. What were the two best things about the trip?

24. What were the two things that you were most disappointed with or thought could be improved?

25. Other comments

If you would like to be in the draw for the **$1,500 grand prize** and/or you would like to receive the newsletter from Savannah Way Limited, please provide your details below.

Name: ……

Email: ……..

Thank You!!

Gulf Savannah Development and Savannah Way Limited would like to thank you for taking the time to participate in this survey. We would also like to acknowledge the funding assistance of the Queensland Government through the Department of State Development's Remote Area Board (RAB) initiative.

Other project partners include:

TerrEstrial Visitor Centre, Low Street Georgetown
Atherton Visitor information Centre, Cnr Main Street & Silo Street, Atherton
Burketown Visitor Information Centre, Musgrave Street Burketown
Normanton Visitor Information Centre & Library, Landsborough Street, Normanton
Karumba Visitor Information Centre & Library, Walker Street, Karumba
True Blue Visitor Information Centre, Stamwell Street, Croydon
Gregory Hotel, Wills Developmental Road, Gregory
Bedrock Village, Garnet Street, Mount Surprise
Undara Experience, Undara Volcanic National Park, Mount Surprise
Cobold Gorge, Howlong Station Forsayth
Burketown Hotel, Burketown
The Lynd Oasis Roadhouse, Kennedy Development Road, Conjuboy
Doomadgee Roadhouse, Savannah Way Doomadgee
Hells Gate Roadhouse, Doomadgee West Road/Savannah Way, Cliffdale Station
Adels Grove, Lawn Hill Road, Lawn Hill
Burke & Wills Roadhouse, Burke Development Road
Sunset Caravan Park, Palmer Street, Karumba
End of the Road Motel, 26 Palmer Street Karumba
Gulfland Motel, 11 Landsborough Street, Normanton

GULF SAVANNAH DEVELOPMENT

APPENDIX 3 - NATIONAL VISITOR SURVEY – DATA EXPLANATION

OVERVIEW

The NVS overnight trips database delivers results from the National Visitor Survey (NVS) on domestic overnight travellers. The National Visitor Survey (NVS) commenced in January 1998, it is an ongoing survey of Australian residents to find out about any recent travel, including overnight trips.

Between 1998 and 2004, interviews were conducted with approximately 80 000 Australian residents aged 15 years and over. From 1 January 2005 interviews are conducted with around 120 000 respondents on an annual basis. The sample has been increased to enhance estimates for smaller States/Territories and tourism regions.

METHODOLOGY

The National Visitor Survey (NVS) is the major source of information on the characteristics and travel patterns of domestic tourists.It measures travel for all reasons, including holiday and leisure travel, business travel and travel to visit friends and/or relatives.

Interviews are conducted continuously throughout the year, using computer assisted telephone interviewing.The NVS is an origin-based survey.In simple terms, this means that respondents are interviewed in their homes and details are collected about their recent travel.Details are obtained of all travel in Australia - travel involving nights away from home, as well as day trips - and travel by Australians overseas.

The NVS has been designed to optimise the reliability of regional estimates.Respondents interviewed in the NVS are representative of the Australian population, based on place of residence, age and sex.

Weights for the NVS are calculated on an individual trip basis. They take into account the age, sex and place of origin of the respondent, the size of the household in which they live, month of travel, the recall period applicable to the trip (for example, 7 days for day trips, 28 days for overnight trips and 3 months for overseas trips) and the number of interviews with a return date in this recall period. The NVS is benchmarked to population estimates of those aged 15 years and over.

OVERNIGHT VISITORS

In the NVS, overnight trips (visitors) are defined as trips involving a stay away from home for at least one night, at a place at least 40 kilometres from home.Only those trips where the respondent is away from home for less than 12 months are in scope.

A traveller is a visitor to a location if they stay one or more nights in the location while travelling, and they are said to have made a visit to the location. Hence, a respondent may be a visitor to several different locations.

Consider a 12 night holiday from Bathurst, where a person spends 2 nights in Sydney, 2 nights at the Gold Coast, 1 night in Brisbane, 3 nights in Port Douglas and 4 nights in Cairns (see chart below).

This traveller has taken one trip, but has taken a visit to a number of different locations whilst on their trip.

At the regional level, this respondent would be a visitor to the Sydney region, the Gold Coast region, the Brisbane region and the Tropical North Queensland region. At the state level, the respondent would be a visitor to Queensland and also a visitor to New South Wales.

As such, at the regional level the traveller is counted as a single visitor to Tropical North Queensland, even though they had 2 stopovers in this region (one in Port Douglas and one in Cairns). Similarly, the traveller is counted as a single visitor to Queensland, even though they were a visitor to 3 different regions in the state.

VISITOR NIGHTS

This refers to the number of nights spent away from home in association with individual visits. In the preceding example, there was a total of 12 visitor nights, with 2 of these being spent in New South Wales and the remaining 10 visitor nights being spent in Queensland. At a regional level, there were 2 visitor nights spent in the Sydney region, 2 visitor nights spent in the Gold Coast region, 1 visitor night in the Brisbane region and 7 visitor nights spent in the Tropical North Queensland region.

INTERSTATE TOURISM

A person is an interstate visitor when they visit a State or Territory other than that in which they reside. In the example above, the respondent was an interstate visitor to the Gold Coast, Brisbane and Tropical North Queensland regions. An interstate visitor night is any night spent in a State or Territory other than that in which the visitor resides. In the example on the previous page, there are 10 interstate visitor nights, all spent in Queensland.

INTRASTATE TOURISM

A person is an intrastate visitor when they visit a location in the State or Territory in which they reside. In the example above, the traveller was an intrastate visitor to the Sydney region. An intrastate visitor night is any night spent in the same State or Territory as that in which the traveller resides. In the example, there are 2 intrastate visitor nights spent in New South Wales.

TOURISM REGIONS

The tourism regions are formed through the aggregation of Statistical Local Areas (SLAs) which are defined by the various State and Territory tourism authorities according to their research and marketing needs. From 1998, TRA and the Australian Bureau of Statistics have adopted a coordinated approach to the use of tourism regions to enable comparability of regional data from different tourism surveys. More information about tourism regions is available from the tourism authorities, or alternatively from TRA.

APPENDIX 4 – INTERNATIONAL VISITOR SURVEY – DATA EXPLANATION

NTERNATIONAL VISITOR SURVEY METHODOLOGY

The IVS samples 40,000 departing, short-term international travellers aged 15 years and over who have been visiting Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports: Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

The IVS contains around 100 questions supported by 'show-cards' that are used to help the respondent answer particular sections including:

- Usual place of residence
- Repeat visitation
- Group tours
- Travel party
- Sources for obtaining information about Australia
- Purpose of visit and places visited
- Transportation and accommodation
- Activities
- Expenditure
- Demographics.

The survey design and management is the responsibility of the National Survey Section in Tourism Research Australia (TRA). The section works closely with the consultants, key stakeholders and industry to develop and maintain high data quality and relevant outputs.

Since 2004, the IVS has been surveying international visitors in four languages: English, Japanese, Mandarin and Korean. The total number of interviews conducted with particular residents of each country or region is distributed among airports by selecting monthly samples of departing flights and visitors on those flights to achieve acceptable sample sizes in various categories.

Survey results are weighted to data on international visitor numbers over the period, provided by the Department of Immigration and Citizenship (DIAC), with the assistance of the Australian Bureau of Statistics (ABS). The variables used in weighting the data are:

- country of residence
- state of arrival
- main purpose of journey
- airport of departure
- age and sex of visitor.

Overseas (visitor) arrivals and departures (OAD) data are also published by the ABS (ABS catalogue no. 3401.0) on a monthly basis.

SAMPLE SIZE

INCREASE IN SAMPLE SIZE FOR 2005 SURVEY

Between 2001 and 2004 interviews were conducted with approximately 20,000 international visitors aged 15 years and over as they were departing Australia. Since 1 January 2005, interviews have been conducted with 40,000 international visitors on an annual basis. The sample was increased in order to enhance the estimates for smaller states, territories and regions. Increasing the sample size of the IVS by 100% has improved the reliability of survey estimates.

VISITOR INTERVIEWS BY COUNTRY OR REGION OF RESIDENCE

The table below shows the number of interviews conducted in the December Quarter 2012 and for the year ended 31 December 2012.

SAMPLE SIZE BY COUNTRY OF RESIDENCE

	Sample (n)	
Country of residence	December Quarter 2012	Year ended 31 December 2012
New Zealand	1335	5 575
Japan	636	2 460
Hong Kong	301	1231
Singapore	690	2 147
Malaysia	564	1797
Indonesia	308	1074
Taiwan	201	678
Thailand	145	599
Korea	372	1468
China	1207	4 030
India	324	1117
Other Asia	330	1134
USA	831	3 247
Canada	229	926
United Kingdom	920	4 084
Germany	265	1202
Scandinavia	174	732
France	177	737
Italy	163	539
Netherlands	134	578
Switzerland	100	448
Other Europe	406	1467
Other countries	847	3 087
Total	**10 659**	**40 357**

DATA RELIABILITY

The results given in the IVS are based on a sample, rather than a census, of international visitors to Australia. As with all sample surveys, the results are subject to sampling variability, and therefore may differ from figures that would be obtained if all international visitors to Australia had been included in the survey.

A measure of the possible degree of difference is given by the relative standard error of the survey and its associated confidence interval, which indicates the extent to which an estimate might vary by chance from the true figure because only a sample of the population was included.

The table below provides the 95% confidence interval widths for a range of estimates available in the IVS. That is, there are approximately 19 chances in 20 that the true number is within the range identified by applying the figures in the table.

SIZE OF 95% CONFIDENCE INTERVAL FOR ESTIMATE (EXPRESSED AS A PERCENTAGE OF THE ESTIMATE)

ESTIMATE	VISITS	NIGHTS	EXPENDITURE
2 000	64.4%	#	#
5 000	41.5%	#	#
10 000	29.8%	#	#
20 000	21.4%	#	#
50 000	13.8%	#	#
100 000	9.9%	75.7%	#
200 000	7.1%	55.4%	#
500 000	4.6%	36.7%	#
1 000 000	3.3%	26.9%	#
2 000 000	2.4%	19.7%	#
5 000 000	1.5%	13.1%	97.6%
10 000 000	1.1%	9.6%	72.8%
20 000 000		7.0%	54.3%
50 000 000		4.6%	36.8%
100 000 000		3.4%	27.4%
200 000 000		2.5%	20.5%
500 000 000		1.7%	13.9%
1 000 000 000		1.2%	10.3%
2 000 000 000		0.9%	7.7%
5 000 000 000		0.6%	5.2%
10 000 000 000		0.4%	3.9%

- 95% Confidence Interval is greater than estimate.

The following example illustrates the use of this table to determine a range within which we are 95% confident that the true total lies. Say, the estimated number of Chinese visitors who stayed in Queensland was 100,000. Looking at the visits column (see table), an estimate of 100,000 visitors has a 95% Confidence Interval of 9.9%. Thus we are 95% confident that the true number of Chinese who stayed in Queensland was between 90,100 and 109,900 visitors (100,000 ± 9.9%).

The IVS relative standard errors were calculated using the Complex Survey Sampling module in SPSS V14.0. Estimates of variation are based on sampling with replacement principles and makes allowances for the IVS stratification. The covariance and estimates output from this program were then regressed with a log transformation using Ordinary Least Squares (OLS) regression to achieve three independent models (for visitors, nights and expenditure). The models were computed using the R statistical program and the actual relationship modelled was:

1n (COV) = a + b * 1n (ESTIMATE)

Where, a = intercept, b = gradient (slope)

The model parameters were approximated as:

	Visits	Nights	Expenditure
a.	2.521841	4.218551	5.837435b
b.	-0.47831	-0.44906	-0.42362

ABOUT US

Gulf Savannah Development (GSD) is an economic development agency and Remote Area Board operating for the benefit of the Gulf Savannah region. GSD is run by a Management Committee, whose members are drawn from member Councils and corporate partners. This structure is currently the subject of a review. For more information, visit www.gulf-savannah.com.au

The Gulf Savannah region is comprised of the following local government areas: Burke Shire Council, Carpentaria Shire Council, Croydon Shire Council, Doomadgee Aboriginal Shire Council, Etheridge Shire Council and Mornington Island Shire Council.

As seen throughout this document, these Councils are coordinated into Statistical Level Areas (SLAs) for the purposes of data collection and analysis by organisations such as the Australian Bureau of Statistics and Tourism Research Australia.

The relevant SLAs are "Carpentaria", which includes Burke, Carpentaria, Doomadgee and Mornington Island; and "Croydon-Etheridge", which includes, unsurprisingly, the shires of Croydon and Etheridge.

The Savannah Way is Australia's ultimate adventure drive, linking Cairns, Katherine and Broome. Savannah Way Limited (SWL) promotes the drive route and is the official Local Tourism Organisation for the Gulf Savannah region. SWL sits under the broader jurisdiction of Tropic Tourism North Queensland, the regional tourism organisation for the region. Savannah Way has multi-level government support and a range of members, from Local Councils to tourism businesses. To find out more, visit www.savannahway.com.au

Gulf Savannah Development and Savannah Way Limited are both not-for-profit, membership-based organisations. All GSD and SWL members receive a range of entitlements including receipt of this and other reports.