



Gulf Savannah Tourism Report 2018



KEY FINDINGS

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

AVERAGE LENGTH OF STAY: the 2012 survey suggested an average length of stay of 11.5 days as compared with 13.98 days from the 2017 survey. 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: the majority of visitors to the region in 2017 were from Queensland (63%). This was far higher than the survey results from 2012 (36%). NVS 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.

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.



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RECOMMENDATIONS



DIGITAL INVESTMENT

RECOMMENDATION 1:

- ◆ Address issues with digital connectivity (broadband, Wi-Fi, 4G) in Karumba: complete the Normanton to Karumba Fibre Optic Project.
- ◆ Address digital connectivity at key tourism sites (Undara, Cobold Gorge, Adels Grove etc.).

RECOMMENDATION 2:

Fund/lobby for improvements to the digital capability of the Gulf Savannah region, including the development of booking and transaction sites for tours, events and accommodation:

NEW PRODUCT OFFERINGS

RECOMMENDATION 3:

Improve product offerings in National Parks & World Heritage Sites

- ◆ Lobby the Australian and State Government to develop a tourism and visitor masterplan for the Riversleigh Fossil Fields World Heritage Site;
- ◆ Lobby the State Government to enable commercial activities to be run in Regional and National Parks and World Heritage Sites.

RECOMMENDATION 4:

- ◆ Enable and promote the development of Indigenous tourism businesses and product.
- ◆ Develop Cattle Station Tours/Farm Stay opportunities across the region
- ◆ Develop new “Mineral Baths/Thermal Springs” experiences.

MARKETING

RECOMMENDATION 5:

Assist relevant proponents (Savannah Way Ltd, Tourism Tropical North Queensland) to develop a marketing and promotion strategy for the region.

STATE OF ORIGIN:

RECOMMENDATION 6:

Work with TEQ, TTNQ, Savannah Way and tourism businesses to boost first time and return visitation of interstate visitors to the region.

COUNTRY OF ORIGIN:

RECOMMENDATION 7:

Work with TEQ, TTNQ, Savannah Way and tourism businesses to boost international visitations from markets other than Germany, New Zealand and England.

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.

STAKEHOLDER COORDINATION

RECOMMENDATION 9:

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

ADDRESSING INFORMATION GAPS

RECOMMENDATION 10:

Lobby relevant entities— State and Federal Government, ABS, Telstra—to provide access to data sets not currently available.

Develop a Data Sharing Agreement/MOU between GSD, local government, Visitor Information Centres, businesses and other entities to improve access to relevant data.