NWQ Digital Visitor Survey Report

Tourism Digital Survey

Department of Innovation Tourism Industry Development and Commonwealth Games

2019-08-20

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Bringing ideas to life

Executive summary

This report documents the results from the North West Queensland Digital Visitor Survey (the Survey). The Survey was commissioned by the Department of Innovation, Tourism Industry Development and the Commonwealth Games (DITID) to provide key information and market insights that can inform future direction and growth of the tourism industry in North West Queensland (NWQ).

NWQ, comprising approximately 35,029 residents across ten local government areas, offers a unique setting and strong heritage. The region's economy has traditionally been reliant on the resources and mining, but the economy has potential to grow and diversify through the development of a vibrant tourism industry.

This Survey was undertaken to support the desired growth in tourism. Through the application of the 'Location Insights Population Movement Data' and other data sources, a multi-faceted view to visitation trends has been provided. The outputs of the Survey enhance the understanding of the tourism industry and provide market insights that can inform strategic initiatives to boost the tourism industry. The information drawn from this survey could be used as a guide to support the planning and implementation of tourism-related projects and initiatives for the region.

The Survey reports on tourism trends over May 2017 to May 2018 capturing seasonal trends, including peak event periods. Key findings of this survey are:

- **Enhanced visitation information**: Through the use of Location Insights, this Survey provides up to date visitation profile of the Region to enable greater insights to visitation trends and minimises lead time to collect information. This provides an enhanced understanding of the NWQ tourism industry visitation trends and benchmarking performance indicators.
- **Domestic visitation:** The Survey finds that the domestic visitation market remains vital to the NWQ region, with the intrastate market representing the highest visitation to NWQ. Domestic visitation is centred within Mount Isa and disperses out to other sub-regions. From a visitation perspective, dwell times are heavily influenced by events and school holiday periods. The demographic profile across all five sub-regions who visit NWQ suggests a mix of business and leisure travellers ranging from above average to low income differentiated by rurality and locality.
- **International visitation:** International visitation represents a small proportion of the overall visitation to NWQ. Specifically, international visitation only accounted for an average of 2% of total visitation into the region, of which visitors are predominantly from Europe, followed by Asia and New Zealand. International visitations are higher during summer periods and lower during winter periods. International visitation is also centred within Mount Isa and disperses out to the neighbouring sub-region.

Opportunities

A benefit of undertaking the study is that it confirms trends and establishes greater detail in the visitation profile. In doing so, opportunities have been identified that may inform strategies and decision-making to support public and private investments. Some of the key opportunities are:

- **Capitalise on identified visitation insights:** Visitors are largely mix of business and leisure travellers visiting from North Queensland. This enhanced understanding and insights derived from this Survey, such as home location and personas, will help to develop targeted strategies to improve product offerings and targeted investment initiatives that aligns to current tourism landscape.

- **Improving dispersals:** NWQ's unique tourist landscape offers a myriad of ecotourism, drive tourism, and paleo-tourism opportunities. Achieving greater dispersal across the region is a mechanism to increase the length of stay in the region as there is currently a large geographical distance between major attractions. There is an opportunity to develop new tourism experiences between population centres and major attractions that seek to create a network of complementary activities that encourage greater distribution of visitors across NWQ, as well as support increases in total visitation.
- **Enhance data collection and distribution:** Data currently collected within the region is characterised by long lead times due to small sample sizes. Improved data collection can reduce these timeframes to more current and responsive visitation information. There is an opportunity to establish new data collection methods at existing visitor information centres to capture aggregated year-on-year visitation trend data to track performance and build baseline statistical data. For example, this could occur through a region-wide data sharing capability between Visitation Information Centres. A stronger base dataset that captures demographic and visitation profiles can be leveraged to target products and experiences.
- **Improve NWQ tourism attractiveness:** Well-informed and collaborative strategies and economic development initiatives will be a key enabler to activate the tourism opportunities in NWQ. A better understanding and greater confidence in the NWQ tourism profile can improve investment potential and inform decision-making. Opportunities exist to coordinate efforts across all levels of Government and industry to facilitate investment and marketing to promote opportunities within NWQ to private investors.

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1 Foreword

The North West Mineral Province (the Province) is one of the world's richest mineral producing areas characterised by its copper, lead, silver and zinc deposits. The Province's mining industry has been the primary driver for growth in North West Queensland. The success of the industry has led to significant economic development opportunities over a long period of time, and but can also expose North West Queensland to external factors such as fluctuations in commodity prices.

The Queensland Government has recognised the reliance of the mining industry in North West Queensland and is implementing strategies to diversify the economy of the region. This includes developing and implementing strategies to enhance the tourism sector.

North West Queensland offers a unique natural landscape, world-class fossil deposits, national parks and a strong Indigenous heritage. These unique natural assets are complemented by strong and vibrant communities which have the potential to support a growing tourism industry.

The remoteness of the region, low visitor numbers and relationship with the much larger Outback Queensland region means that existing data on tourism visitation to the North West Queensland is limited. Collecting information regarding visitation to the region is central to assessing known, as well future tourism opportunities and priorities.

Aurecon has been appointed by the Department of Innovation, Tourism Industry Development and the Commonwealth Games (DITID) to undertake a Digital Visitor Survey. A key component of the survey is the application of population movement data (from Telstra's Location Insights).

This information provides a greater level of granularity relative to existing data sources and at a frequency which minimises lead times typically associated with tourism surveys in the Outback Queensland. From this, conclusions can be derived based on visitation trends and strategies developed to enhance the tourism sector in North West Queensland.

This report provides Aurecon's approach and findings for the Digital Visitor Survey.

2 Introduction

2.1 Survey Context

In November 2015, the Queensland Government supported the establishment of a North-West Minerals Province Taskforce (Taskforce) to investigate the issues and opportunities impacting the Province and advise on a way forward for the region's future.

The Taskforce identified opportunities to support the mining industry into the future, including:

- more efficient utilisation of enabling infrastructure
- improving exploration and mining approvals processes
- encouraging the processing of waste material
- driving greater exploration success
- attracting new investment capital.

While the Taskforce largely focused on the mining industry, it also recognised that diversifing economic drivers will be essential to growing the resilience of North West Queensland economy and community over the long term.

In response to the Taskforce recommendations, the Government, through the Department of State Development, Manufacturing, Infrastructure and Planning (DSDMIP), developed *A Strategic Blueprint for Queensland's North-West Minerals Province* (the Blueprint). The Blueprint aims to facilitate a smooth transition towards a stronger and more diversified economy over the longer term. The Blueprint contains three strategic priorities that have been identified as central to securing the future of the Province.

- facilitating continued resources sector development
- diversifying the regional economy and creating employment opportunities
- working with businesses and communities to deliver integrated and appropriate services

These priorities reflect a broad and balanced approach to create new economic opportunities and build greater community resilience. The priorities will be delivered across two phases, short-term actions six to 12 months and medium-term actions, year one to year four.

One of the short-term actions under strategic priority two is the development of the North-West Queensland Economic Diversification Strategy (NWQ EDS). The aim of the NWQ EDS is to develop a long-term regional economic diversification strategy to identify development opportunities in key sectors including resources, agriculture, tourism, and business and industry.

The strategy will explore ways to create the pre-conditions necessary for a more diverse range of drivers for the regional economy to:

- optimise continued local employment opportunities
- support the Province's liveability and ability to attract and retain workers and their families
- build the right skill mix for the jobs of the future
- foster the development of entrepreneurial capacity in the region
- examine cost-effective opportunities to enhance enabling infrastructure such as energy, water, ICT (to capture visitation data) and transport.

The strategy will be developed through a whole-of-government approach and in collaboration with key stakeholders, local businesses and communities.

The key actions to be delivered in developing the NWQ EDS will include:

- scope opportunities for increasing agricultural production
- improve the digital presence of regional start-ups and established businesses
- investigate tourism opportunities

With respect to investigating tourism opportunities, Aurecon has been commissioned by the Department of Innovation and Tourism Industry Development and the Commonwealth Games (DITID) to undertake a Digital Visitor Survey (Survey).

2.2 Survey Background

The Department of State Development, Manufacturing, Infrastructure and Planning is a lead government agency with an interest in driving economic growth in Queensland. DITID leads projects relating to tourism in Queensland as a mechanism to drive a diversified economy.

In this context, DITID has commissioned the **North West Queensland Digital Visitor Survey**. The survey aims to provide confidence through verifiable visitation data and insights that will inform the future direction and growth of the tourism industry in the NWQ region. Information and insights drawn from the survey can guide and support the planning and implementation of tourism related projects and initiatives that form part of the NWQ EDS.

The output from the survey can be used to inform key tourism stakeholders in developing strategies to:

- raise the profile of local products and experiences
- provide insights and identify opportunities to refine and expand the tourism offering for existing visitor markets, including Indigenous tourism
- improve the attractiveness of the region within new tourism market segments
- encourage longer stays
- increase visitor expenditure
- facilitate ongoing tourism investment
- ensure tourism infrastructure meets current and potential new market expectations and identify opportunities for its enhancement.

The verification of existing data sources delivered through this survey, combined with new data and insights will enhance data confidence and better inform decision-making for all regional stakeholders. In the short-term, these data insights will also contribute to consideration, development and prioritisation of actions proposed by the NWQ EDS.

Opportunities have been identified to inform future strategies and policies on how to enhance tourism in the North West Queensland (NWQ) region.

Figure 1 provides an indication of how the survey aligns with the broader Blueprint strategy.

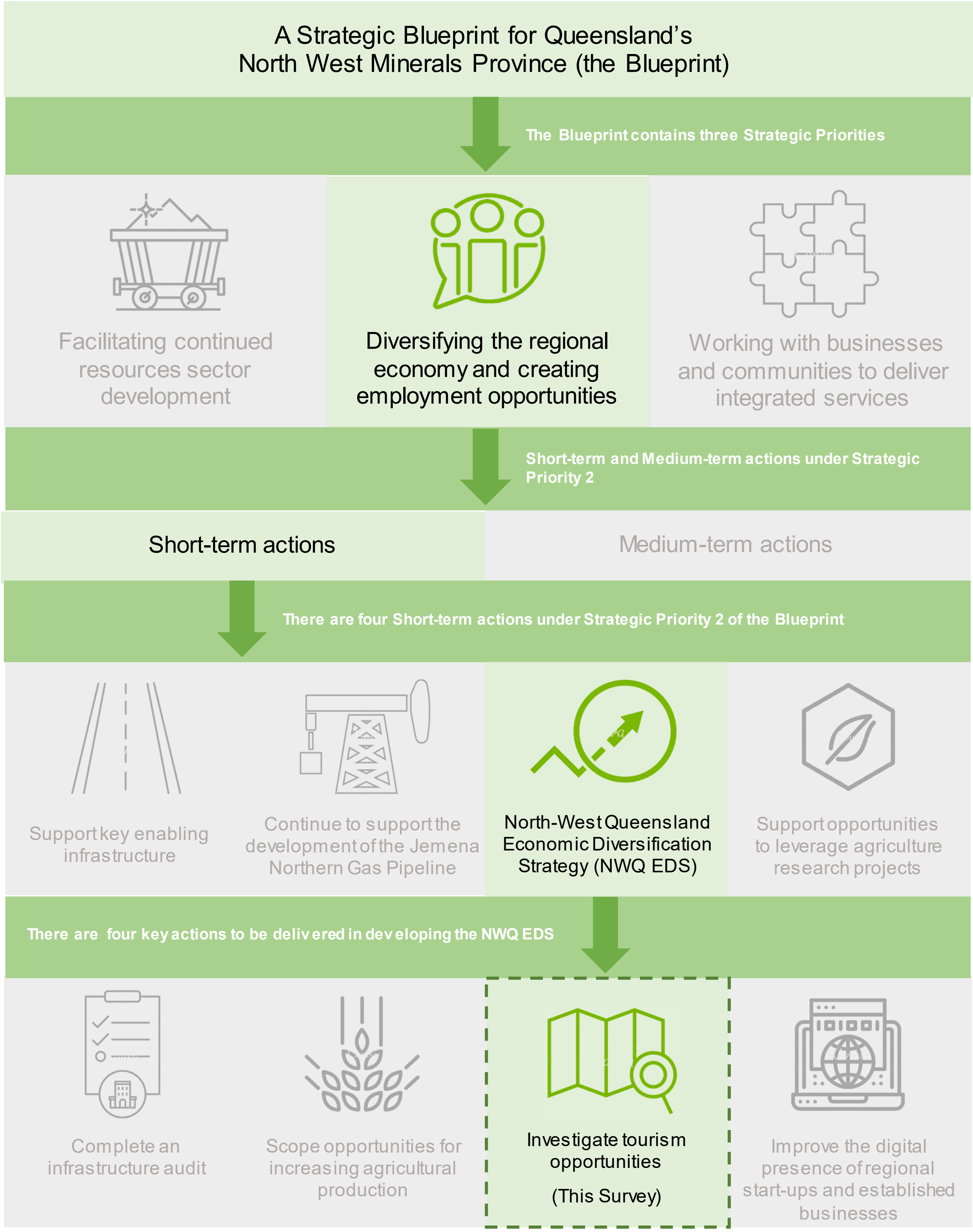


Figure 1 – NWQ Digital Visitor Survey strategic context

2.3 Regional Profile

For the purposes of this survey the NWQ region comprises a total of five (5) statistical area level 2s (SA2s) of Carpentaria, Croydon – Etheridge, Mount Isa, Mount Isa Region, and Northern Highlands with a total land area of 375,779.4km^2.[1] The NWQ estimated resident population at 30 June 2018 was 31,231 persons[2], with an annual growth rate of -2.3% over a five-year period. Mount Isa remains the largest population centre in the region, accounting for up to 58% of the total NWQ estimated resident population.

NWQ is renowned for its natural environment, characterised by a range of vegetation types and diverse landforms, geology, soil types and climatic variations. From November to March, summers are typically very hot, with an average temperature within the range of 18.6°C to 32.5°C and periods of intense rainfall. Winters are usually cool and dry.

The mining and mineral industry are key employers in the region and serve as a major economic drivers for the region, employing up to 22.5% of the total NWQ region workforce. Up to 60% of jobs in the region are directly or indirectly supported by the mining industry, followed by health care and social assistance, agriculture, and tourism.

The North West Mineral Province, centred around Mount Isa and Cloncurry, holds about 75% of Queensland's base metals, some of the world's richest deposits of copper, silver and zinc, and produces over 70% of the value of Queensland's metalliferous minerals[3]

The healthcare and social assistance industry employs up to 9.4% of the regional workforce, followed by the agriculture industry employing 8.7% in 2017[4]. The agriculture industry supports the local regional economy which includes grazing, beef cattle production, horticulture and cropping.

The NWQ tourism industry is a key contributor to the economy. NWQ is home to an array of unique landscapes, world-class fossil deposits, national parks, and a strong Indigenous heritage. Combined, NWQ offers a vibrant and unique community paving the way for a growing vibrant tourism industry. NWQ is also the host of some of Australia's biggest and most unique events such as the Mount Isa Rodeo event, Julia Creek Dirt'n'Dust Festival. Many more carnivals, community events, and race days ensure events are not just key to attracting national and international tourists, but also make a significant contribution and benefit to local communities.

Mount Isa is a major regional activity centre within NWQ and is home to the largest mines in the region supporting industries and critical infrastructure. The city is a key centre for the region providing a concentration of employment, businesses, infrastructure, major facilities, and services. Further to this Mount Isa is the region's hub for delivery of a variety of health, community service, education, and contains key agriculture, fishing, and forestry industry. Critically from a tourism and economic point of view, Mount Isa is the region's transport hub. The city provides inter and intra regional services via rail, road, and commercial air networks. The city supports critical links to neighbouring regions, as well as interstate, and is a key minerals corridor for the transport of mined resources to the Port of Townsville for international export.

For the purposes of the Survey, of the five (5) SA2s, NWQ is comprised of 10 local government areas (see Figure 2):

- Burke Shire Council,
- Carpentaria Shire Council,
- Cloncurry Shire Council,
- Croydon Shire Council,
- Doomadgee Aboriginal Shire Council,
- Etheridge Shire Council,
- Flinders Shire Council,
- McKinlay Shire Council,
- Richmond Shire Council and
- Mount Isa City Council.

[1] Source: Queensland Globe, https://qldglobe.information.qld.gov.au/
[2] Source: Australian Bureau of Statistics, 2012 – 2017
[3] Source: North West Minerals Province: *A Strategic Blueprint for Queensland's North West Minerals Province*
[4] Source: NWQ Study Area – Queensland Regional Profiles, Queensland Government Statistician's Office

Figure 2 – Survey area (source: *A Strategic Blueprint for Queensland's North West Minerals Province*)

2.4 Project Governance

The survey was commissioned by DITID, with the Department appointing Aurecon as its advisor to develop a better understanding of the NWQ visitor market. The visitor analysis represents a basis for informing tourism infrastructure, product and experience development. Aurecon in turn engaged Telstra as the preferred telecommunications provider to provide the relevant visitor information data required for analysis.

A Project Reference Group (PRG) comprising of key stakeholders was established to provide input on all project related matters and to facilitate local community involvement. The PRG comprised representatives from DITID, Department of State Development, Manufacturing, Infrastructure and Planning (DSDMIP) and Tourism and Events Queensland (TEQ).

3 Research approach

The approach to deliver the survey was based on the following three steps:

- **Identifying data sources**: engaging with stakeholders to understand the type and nature of data available that would assist in measuring and defining the visitation profile for NWQ
- **Acquiring data sources**: once relevant datasets were identified, negotiating with stakeholders on the acquisition of data to support the survey. This included defining data sharing parameters such as access and confidentiality
- **Data analysis**: following the acquisition of data, Aurecon applied mathematical models to derive the findings for the survey. The findings are detailed in Section 4 of this report.

This section provides context and information on the research approach that was applied in order to derive findings and inform the recommended next steps to enhance visitation to NWQ.

3.1 Identifying data sources

The defined NWQ survey region represents a remote area of Queensland that is characterised by limited existing information and data that could support robust analysis of visitors to the region. Aurecon engaged with a range of stakeholders to identify the datasets that are of relevance to the survey. In particular, this included Telstra Location Insights, which was a critical component of the survey as it provides a comprehensive set of information to measure baseline visitation to NWQ.

3.1.1 Telstra Location Insights

A core component that underpinned the survey was the use of Telstra Location Insights, which provides information on visitation. This is achieved through Telstra's anonymised analysis of cellular interaction within its network to create high level location-based insights to understand how populations move in and around the region.

Given the remoteness of NWQ, Telstra was identified as a key data source as it captures visitation across areas that otherwise have limited or no accurate and/or statistically significant data. For purposed of this survey, this includes measuring visitation for peak and non-peak periods, around events and school holidays, and weekdays and weekends.

For the survey, Aurecon consulted with Telstra to define the 10 Local Government Areas comprising the NWQ region and provide information on the following metrics:

- Visitation within the defined NWQ region across domestic and international visitors
- Dwell time
- Home location
- Country of origin
- Demographic profile

The outputs of consultation and negotiation provided clarity on the data to be acquired and utilised in the analysis.

3.2 Additional data sources

Other additional data sources were identified to complement the comprehensive nature of Telstra's data. The data sources targeted sought information on visitation patterns, profile, and numbers for the NWQ. Following consultation with the PRG, the organisations listed below were engaged as part of the survey:

- Tourism Events Queensland
- Queensland Airports Limited

- Visitor Information Centres in:
  - Burke Shire Council,
  - Carpentaria Shire Council,
  - Cloncurry Shire Council,
  - Croydon Shire Council,
  - Doomadgee Aboriginal Shire Council,
  - Etheridge Shire Council,
  - Flinders Shire Council,
  - McKinlay Shire Council,
  - Richmond Shire Council and
  - Mount Isa City Council.

The existing data sources and information obtained from these organisations were used to obtain additional findings and to validate the findings arrived at through analysis of Telstra's Location Insights.

3.3 Acquiring the data

3.3.1 Telstra Location Insights Data

Confirmation of metrics

The Telstra Location Insights data covers a diverse set of information and metrics. To ensure that the most appropriate data were acquired as part of this survey, Aurecon held a scoping workshop to confirm the key survey themes and the frequency of measurement. From this, it was agreed to measure:

- Visitation across weekdays and weekends
- Proportion of visitation that relates to business
- Seasonality to understand trends in visitation based on seasons, including school holiday periods
- Impacts of events on visitation
- Home location of domestic visitors
- Country of origin for international visitors

These metrics were to be measured against the study area, which was geofenced by Telstra as depicted in Figure 3.

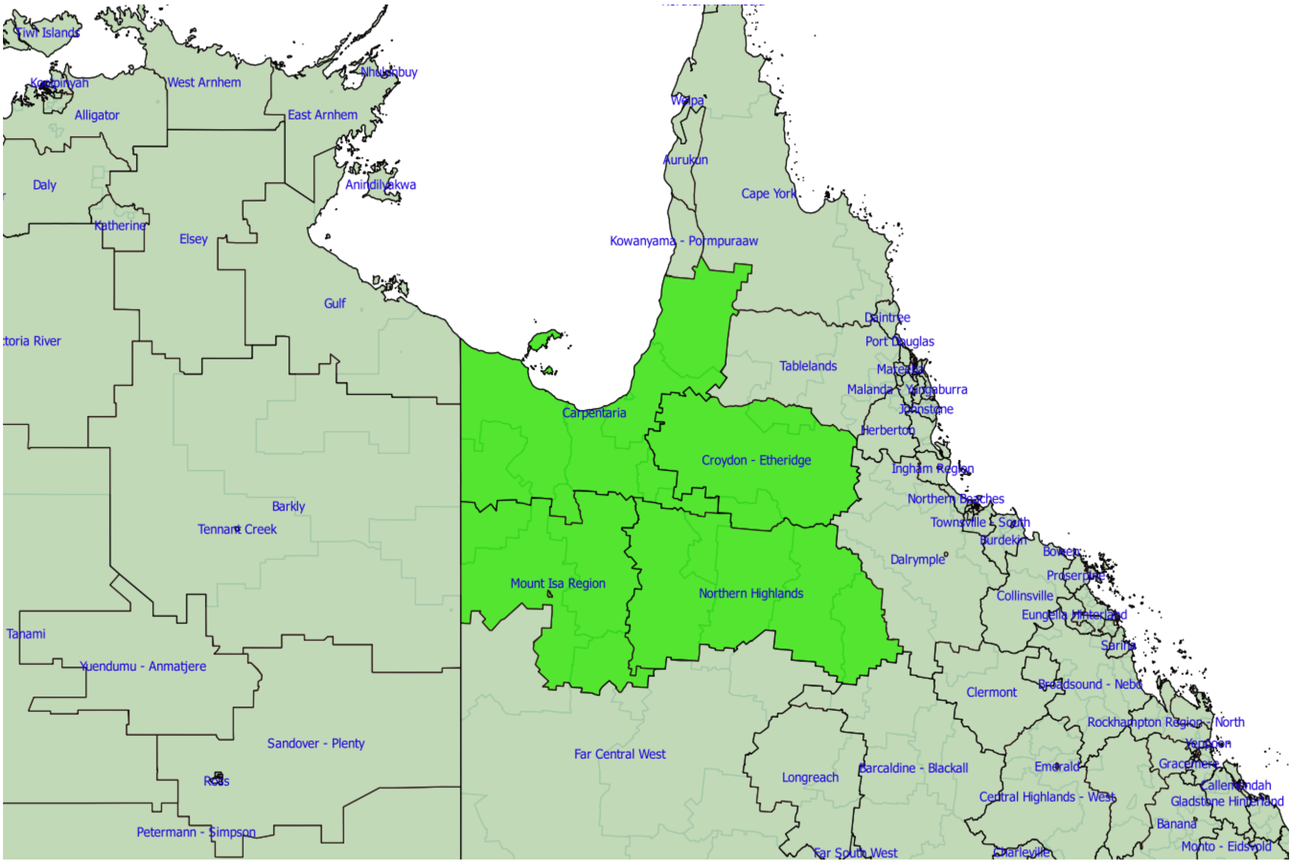


Figure 3 – Telstra's defined survey area

Project Timeline

The final aspect of data acquisition from Telstra was to define the project timeline. Defining the survey period was an important aspect of the survey to ensure that representative data could be obtained. This included understanding changes to visitation across seasons and events. Given the survey requirements, Aurecon mapped the project timeline which was subsequently endorsed by DITID. The project timeline (highlighted in blue) for the survey covered all seasons, major events, school holidays and public holidays and is represented in Figure 4.

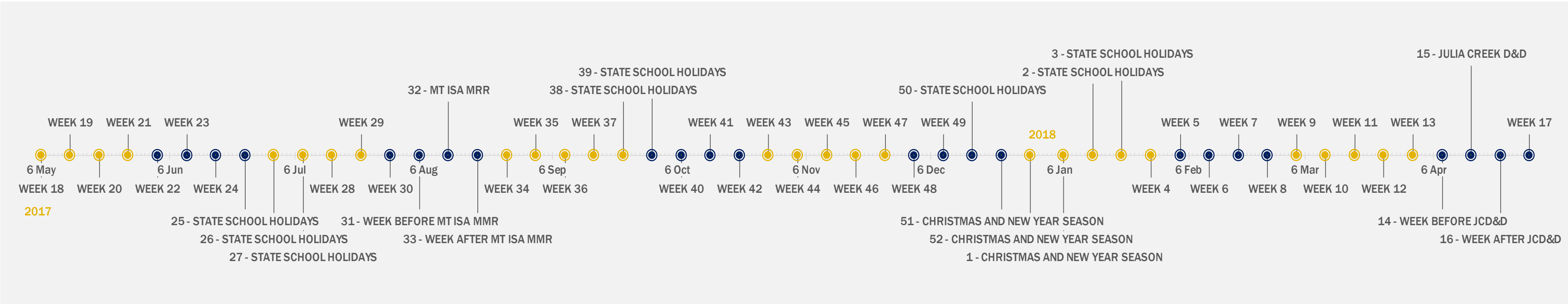


Figure 4 – Project timeline

24 weeks of data was acquired at these intervals as it was determined that it was representative in nature and captured various points of interests such as holidays and key events. The benefit of this approach was that it:

- is easy to interpolate between missing weeks/months providing there are no "events"
- contains good data for analysis of how count changes leading up to and after an event
- includes monthly coverage of "event" and "non-event" months

The outputs of this information have been incorporated in the findings in Section 4.

3.3.2 Other data sources

Tourism Events Queensland

Tourism Events Queensland (TEQ) provided data obtained from the National Visitor Survey (NVS).

The NVS is a large-scale telephone survey which has been conducted continuously since January 1998 and is designed to measure domestic and outbound travel by Australian residents[5].

NVS concepts and definitions are based on those developed by the United Nations World Tourism Organization (UNWTO). NVS eligibility includes any Australian resident who is 15 years of age or more and has lived in their current residence for at least three months.

NVS interviews are distributed evenly across most days of the year (with the exception of 12 public holidays), which means that the current annual quota of 120,000 interviews are completed at a steady rate of around 2,300 per week.

Sample size and sample type across the time-series:

- 80,000 annual landline sample from 1998 through to 2004
- 120,000 annual landline sample from 2005 through to 2013
- 120,000 annual dual-frame sample continues from 2014-2017 with a 50:50 mobile/landline split

The types of trips collected by the NVS include overnight trips, day trips and outbound (international) trips, though some types of routine trips (such as same-day journeys to work) are excluded. Overnight or outbound trips of more than one calendar year in duration are also excluded.

Queensland Airports Limited (QAL)

Queensland Airports Limited provided 2017 passenger numbers for the Brisbane-Mount Isa (BNE-ISA) route, and Townsville/Cairns – Mount Isa (TSV/CNS-ISA) routes. This represents the major regional airport and data was provided as a basis to assess visitation through major visitation routes.

There is only one carrier on each of these routes, as such, the data is combined to ensure sensitive load factor data are protected.

Mount Isa Annual passenger survey statistics. Survey was conducted 17-24 November 2017, with a total of 510 passengers surveyed.

Visitor Information Centres

Data was provided by seven of the ten Visitor Information Centres (VICs) surveyed. The data provided by the VICs measures visitation to the region and is captured daily by volunteers as tourists and residents visit the visitor information centres. Data is filtered into local, Australian state and territory, and overseas visitors.

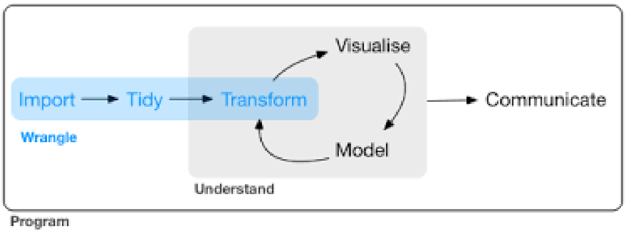
[5] https://www.tra.gov.au/Research/Domestic-tourism-by-Australians/national-visitor-survey-methodology

3.4 Data analysis

For the purpose of this study, software package R, an open-source, scripting statistical and analysis package was used to:

- import raw data acquired from Telstra
- cleaning and structuring data to remove bad or missing observations
- visualise and model data

This process is illustrated in the diagram[6] below.



24 weeks of data between the period of May 2017 to June 2018 as shown in Figure 4 and tabulated in Table 1 to Table 3 was licensed from Telstra with the weeks chosen at intervals across a 52-week span in order to make the data as representative as possible. Telstra provided data for international and Australian visitors in three datasets, they are:

- population volume count;
- origin, and;
- dwell time.

Telstra gathers the data from clients and their subsequent mobile device "hand-shakes" with cellular towers. Proprietary models determine the location of the client and to protect privacy, the data is anonymized using K means anonymization. Value counts less than 10 are not recorded.

3.4.1 Datasets

Population volume count

This dataset captured the number of people in a SA2 region regardless of origin across a day at hourly intervals. The count of people is unique for a given hour, but not unique across a day, meaning the hourly counts cannot be aggregated to provide a daily count. This dataset shows a usage profile across a SA2 region over a 24-hour period.

Origin

This information captured the origin of visitors in a SA2, also across a day at hourly intervals. This dataset also included the origin of visitors, the state for Australian visitors and country for international visitors.

Dwell time

The dwell time metric recorded how many hours a person remained in a SA2 region (the duration) after arrival (the time band).

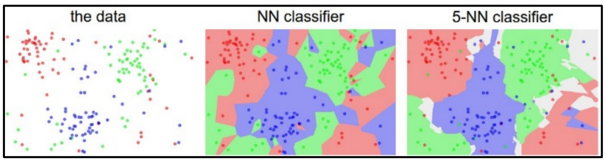
3.4.2 Data Wrangling

Data wrangling is the process of cleaning, structuring and enriching data into a desired format to enable downstream analysis. For the purpose of this survey:

- anonymized values – value counts less than 10 were replaced with a value of 5; and
- missing data and months not purchased as a result of K anonymization were transformed and mapped to provide a complete dataset.

Completing a year's data

To complete the datasets with a year's data, months that were not purchased were computed using K Nearest Neighbours Imputation. This method assumes that the missing data will be similar to its "neighbours", or observations with similar values. In this case, missing values were computed by considering other data with the same day of week, time band, country, and closest month.



Checks were conducted to confirm that no imputed values were greater than two standard deviations of the purchased values which could distort analysis results.

An example of the final datasets used for analysis are shown below.

[6] Source: R for data science, Hadley Wickham

Table 1 – Population Volume Count

Date	Day Name	Month Name	sa2_name	Time Band	Count
2017-06-03	Saturday	June	Croydon-Etheridge	0:0-0:59	40.67
2017-06-03	Saturday	June	Mount Isa	16:0-16:59	25.45

Time bands: hourly across a 24-hour period i.e. 10:0-10:59, 11:0-11:59, 12:0-12:59 etc.

Table 2 – Origin

Date	Day Name	Month Name	sa2_name	Origin	Count
2017-06-12	Monday	June	Carpentaria	New Zealand	10
2017-08-02	Wednesday	June	Northern Highlands	Germany	33

Table 3 – Dwell time

Date	Day Name	Month Name	sa2_name	Time Band	Duration Band	Count
2017-07-27	Thursday	July	Northern Highlands	12:0-17:59	180+	967

3.5 Data Definition

Term	Definition
Visitor	Anyone who is seen entering the 'NWQ Zone (5 SA2s) who doesn't regularly (i.e. not a worker) visit the NWQ zone.
Duration of Stay	Accumulation of dwell time: Capturing and accumulating time spent per person (both day and night visitors) per area. Any dwell longer than 15 minutes will contribute to a time band.
SA2	Statistical Areas Level 2 (SA2s) are a general-purpose medium sized area built from whole SA1s according to the Australian Bureau of Statistics. SA2s generally have a population range of 3,000 to 25,000 persons and have an average population of about 10,000 persons. There are 2,196 SA2s covering the whole of Australia.

3.6 Information on non-visitors

The data obtained from Telstra has been filtered to account for non-visitors through a home-work attribution model. The purpose of this filtering is to recognise that NWQ has a strong FIFO/DIDO workforce and may overrepresent visitation counts. Therefore, it is important to measure visitation in a way that does not include the non-visitors pool.

The approach to filter non-visitors sought to balance the need to provide a true representation of visitation while capturing potential business visitors and minimise significant customisation from Telstra that could have cost implications for the survey.

Further information on the methodology to filter non-visitors is detailed in Appendix B.

4 Findings

NWQ, as part of the Outback Queensland brand has seen a steady positive increment in the number of visitors and visitor nights over the years. The Pathfinder Report, commissioned by the Remote Area Planning and Development Board (RAPAD) estimated that significant tourism industry growth can be achieved in the Outback Queensland Region[7].

Aurecon has undertaken modelling of the data to derive findings that are based on domestic and international tourism trends. The analysis has been undertaken with a view to establishing a more current visitation profile that informs strategies and decision-making to support public and private investment for new and improved tourism infrastructure and products. With a focus on tourism as a growth area for North West Queensland (NWQ), the findings can be leveraged to diversify the economy for the NWQ.

4.1 Enhanced visitation information

Historically, data has been sporadic and characterised by long sample times to infer trends in visitation. The acquisition of Location Insights data from Telstra and analysis undertaken through this Survey provides richer information and understanding of the region than previously known.

An enhanced visitation profile has been achieved through this survey by applying new technologies and acquiring new datasets to baseline and model trends in tourism. The data has contributed to existing baseline information while also establishing information that did not previously exist.

A summary of the outcomes achieved of the new data and its relevance to the visitation profile is detailed in Table 4.

Table 4 – Visitation profile: outputs of data acquired

Outcomes	Details
New information	▪ Demographics including, age, gender, preferences through (helix persona) ▪ Home location ▪ Dwell time ▪ Domestic tourism profiles (interstate information) ▪ International visitation
Baseline information	Current information on the baseline visitation patterns ▪ Visitation trends ▪ Seasonality including holidays ▪ Impacts of events on visitation

[7] The Pathfinder Report, RAPAD, 2017 http://www.regionalaustralia.org.au/home/wp-content/uploads/2017/07/RAPAD_Fin_rpt_July06_2017.pdf

Data granularity	▪ Information beyond traditional datasets including demographic profiles ▪ Enable multi-faceted views around visitation trends and benchmarking performance indicators ▪ The ability to plan new infrastructure, products and experiences based on a greater understanding of visitors
Dynamic vs static data	▪ Minimisation of lead times to understand trends in visitation with a greater sample size ▪ Location Insights provides an enhanced understanding of weekdays against weekends and a rapid frequency of measurement
Statistically significant data	▪ Measurements on the hour

These outcomes provide greater insights on visitation to the region and minimises the lead time to collect information. In turn, this facilitates more effective planning and targeting of tourism policies. Section 4 provides details on the baseline information, trends and profiles of the visitors to NWQ. From this, we have developed proposed next steps and recommendations from the findings of this survey.

4.2 Overall visitation

NWQ visitation continues to be heavily driven by the domestic intrastate market. The overall NWQ visitation is composed of 77% intrastate, 21% interstate, and 2% international visitation. This confirms that intrastate visitation remains a vital market to the NWQ tourism economy. The high intrastate visitation is likely due to close proximity, accessibility and cost in comparison to other states and region. Moreover, this is also underpinned by the business traveller segment within the mining, health & community services, and government administration sectors. The following sections explores this in further detail outlining the key trends impacting both domestic and international visitation in NWQ.

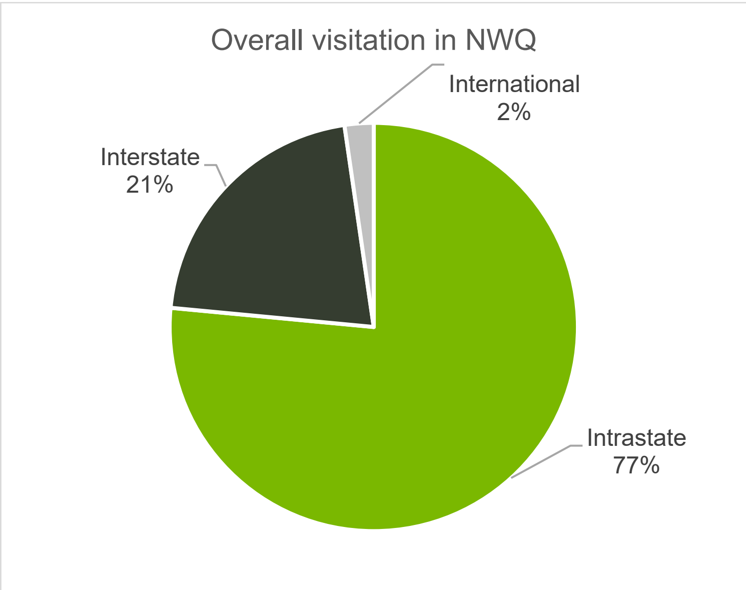


Figure 5 – Overall visitation in NWQ[8]

[8] National Visitor Survey, Tourism Research Australia

4.3 Domestic tourism trends

In 2017, Tourism Research Australia reported[9] that the Outback Queensland region (including South, North and Central West Queensland) reported 878,000 domestic visitors, this represents a three-year record high in domestic visitation growth of 9.7% outpacing the state's 3.4% growth over the same period. The year-on-year domestic visitation growth suggests increased demand for Outback Queensland with a flow on effect to increased spending into the local economy and subsequently the value of Outback Queensland tourism industry, which in 2017, approximated to $602 million per annum[10].

4.3.1 Visitor Origin

The home location derived through Location Insights provides a greater level of insight in relation to the source market of visitors to the NWQ region. Understanding the home location (along with demographics –Section 4.3.6) of these visitors facilitates targeted engagement of the visitation base.

Analysis of the data indicates that the domestic market remains vital to the NWQ regional visitation. The intrastate market from North Queensland represents the highest domestic visitor origin into NWQ, where 76.5% overnight visitors are intrastate, and 21.1% interstate. This is likely to be due to the close proximity, accessibility and cost in comparison to other states and regions.

Beyond the categorisation of visitation to NWQ, the Location Insights data modelled provides the ability to determine the visitor origin for each NWQ sub-region that has been defined for the Survey. With respect to these sub-regions, the home location (origins) are represented as follows.

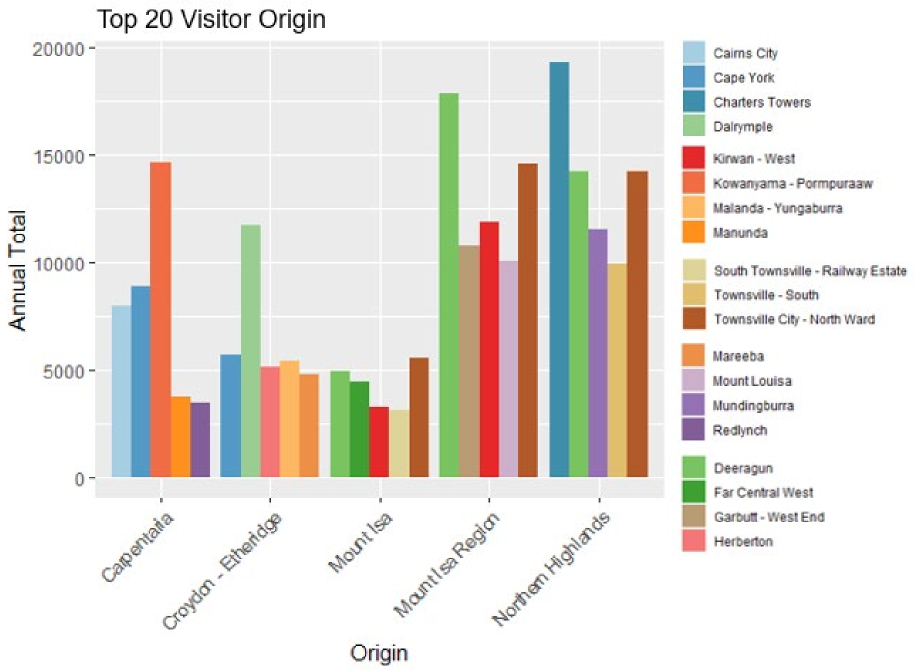


Figure 6 – Top origins against sub-regions

[9] Limitations to derive findings elicited in TRA's National Visitor Survey are detailed within https://www.tra.gov.au/About-us/Frequently-Asked-Questions/frequently-asked-questions
[10] Outback Regional Snapshot, Tourism Events Queensland

The findings from our analysis highlights that North Queensland is the predominant origin for those visiting NWQ. This demonstrates that visitation to NWQ is highly dependent on geographic proximity and may be attributed to the accessibility of the region[11]. This origin visitation profile is likely to represent a mix of leisure and business travellers (see Section 4.3.3 and 4.3.4).

Accounting for the heavy concentration of visitors from North Queensland, a separate table (Table 5) has been developed to provide further clarity on visitation beyond those within closer proximity. This is intended to provide additional information that can inform planning and tourism strategies for those that are outside the traditional visitation base of North Queensland.

Table 5 excludes major North Queensland regions such as Townsville, Cairns, and Outback Queensland. From this, it is observed that:

- Mount Isa and Mount Isa region attracts the most interstate visitation, followed by Carpentaria. Whereas, Croydon-Etheridge and Northern Highlands continues to rely on intrastate visitation.
- NWQ receives the highest interstate visitation from Northern Territory (Katherine and Howard Springs) across all 5 SA2s. The majority of visitors from Brisbane Airport are likely to be travelling for business purposes. This has been determined as the Location Insights data has been reconciled against Queensland Airport information which highlights that visitation as a whole to NWQ is predominantly for business purposes (82%).

[11] High counts of visitation (Figure 5) for NWQ sub-regions such as Northern Highlands does not necessarily indicate a high visitation overall as the graph captures only the top 20. Areas such as Mount Isa will have a greater spread of visitation due to factors such as airport accessibility and its status a business hub.

Table 5 – Top 10 unique visitor origin, excluding North Queensland (Townville, Cairns, and Outback)

Unique visitor origin count from Home SA_2 for the period June 2017 - May 2018

Home SA2	Carpentaria		Croydon - Etheridge		Mount Isa		Mount Isa Region		Northern Highlands	
Visitor Origin	Brisbane Airport	1526.94	Central Highlands - West	1276.72	Howard Springs	3056.27	Katherine	7004.13	Central Highlands - West	2618.77
	Gulf	1517.48	Seaforth - Calen	798.78	Katherine	2841.16	Howard Springs	6165.66	Howard Springs	2453.55
	Katherine	1337.54	Clermont	706.7	Brisbane City	2259.27	Brisbane City	4337.55	Broadsound - Nebo	2113.68
	Central Highlands - West	1288.27	Maryborough Region - South	576.81	Darwin City	2187.23	Barkly	4322.72	Katherine	2063.02
	Howard Springs	856.36	Emerald	574.52	Central Highlands - West	1736.56	Brisbane Airport	4249.08	Collinsville	1792.63
	Roma Region	834.79	Nundah	552.44	Ross	1615.62	Darwin City	4190.71	Roma Region	1678.89
	Emerald	830.41	Collinsville	507.01	Barkly	1560.99	Upper Coomera - Willow Vale	3933.22	Roma	1574.2
	Darwin City	801.39	Darwin City	495.02	Charles	1556.75	Roma Region	3777.72	Seaforth - Calen	1525.2
	Collinsville	713.99	Katherine	482	Weddell	1265.97	Central Highlands - West	3774.7	Darwin City	1346.13
	Tamborine - Canungra	694.89	Broadsound - Nebo	460.9	Broome	1265.01	Weddell	3696.52	Clermont	1297.14

** text in **blue** denotes interstate visitation

4.3.2 Visitation concentration

The visitation concentration is an important metric to understand the most frequented sub-regions within NWQ. Developing this profile can inform the future tourism investment in a manner that targets the most frequented areas and also facilitates improving dispersal across NWQ.

The greater Mount Isa area (comprising Mount Isa and Mount Isa Region) represents the highest concentration of visitors followed by the Northern Highlands. This visitation activity highlights Mount Isa as the central point of visitation. This can be attributed to its role as the region’s major activity centre and mix of employment, business, facilities, and services it provides. Consequently, Mount Isa has the most mature access infrastructure (major domestic airport), and visitor infrastructure in the region.

The concentration of visitation to Mount Isa and its surrounds relative to other sub-regions is likely to be due to the status as the economic base of NWQ and its location as a major connector to the national highway. It is likely that Mount Isa and the Mount Isa region are drawing a greater and more diverse mix of visitors in comparison to the remainder of NWQ.

The visitation density heat map in Figure 7 demonstrates the concentration of visitation across the NWQ region and is represented through a heat level gradient – red being highest concentration of visitation and light green being the lowest. Given the data commissioned for the purpose of this study, the coverage of the heat gradient is limited to the five selected SA2 study areas (demarcated in blue).

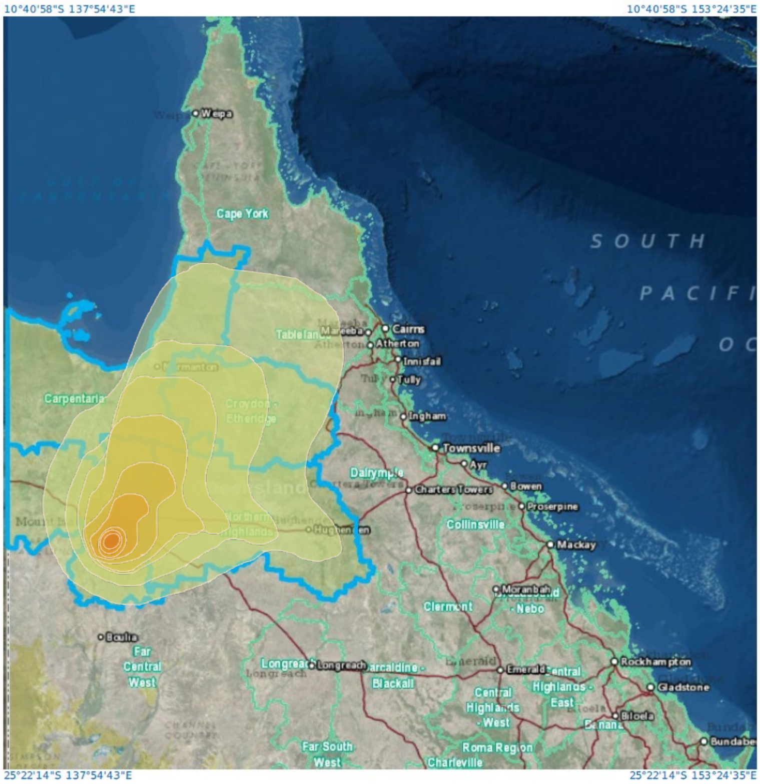


Figure 7 – Domestic visitation heat map

The higher concentration in Mount Isa is not translating to significant dispersal or concentration to other sub-regions within NWQ. This may be attributed to the geographic distance between regions and attractions, and purpose of visit. The remoteness of the region means that there are limited experiences between population centres andmajor attractions in the region.

Importantly, the heat map indicates the possibility to generate greater dispersal by targeting those visiting Mount Isa including business travellers that may return for leisure given its location on a major highway route such as National Highway 1, Flinders Highway, and Burke Development Road which connects Cairns, Townsville, and Normanton to the region.

Achieving greater dispersal can be facilitated by establishing experiences between each major attraction. For example, the 12-day Drive North West Queensland routes connects tourist attractions and activities to major drive routes within the region to improve the desire to travel and explore the region. This presents an opportunity to further improve drive route experiences through establishing more attractions and activities within major routes, improving dispersal by reducing perceived travel times and improving user experiences between towns and regions.

4.3.3 Day trips

Over a 10-year period, the day trips in Outback Queensland are subject to volatility as demonstrated in Table 6 below. While volatile, Outback Queensland[12] has been subject to an overall uptrend with day trip counts increasing approximately 40% over a 10-year period.

Table 6 – Outback Queensland year on year day visitor count[13]

Financial year (20')		08/09	90/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18
Day Visitors	Visitors (Total)	498,000	558,000	584,000	545,000	516,000	400,000	796,000[14]	527,000	608,000	701,000
	Annual Change	-	12.05%	4.66%	-6.68%	-5.32%	22.48%	99.00%	-33.79%	15.37%	15.30%

In the context of NWQ, the total day trip count is 450,000 in 2017 which makes up to 47.97% of the total NWQ visitation count. The high percentage of day trips may be attributed to a number of reasons including business day trips, domestic day visitors (from neighbouring regions) including those counted as visitors that are passing through to onward destinations[15].

This day trip visitation represents a level of importance to the region as it provides an opportunity to:

- Convert common intra regional day trip visitation to overnight stays, such as business trips from Mount Isa to Cloncurry to Mount Isa;
- Convert common inter-regional business flight day trippers to overnight stays such as from Brisbane to Mount Isa and return; Townsville and return routes;
- Convert pastoral stations trips such as Mount Isa and return; Djarra-Mount Isa and return;
- Transition business visitors to leisure visitors; and
- Increase the length of stays for onward journeys;

Understanding the profile of the day trip visitation presents opportunities to improve dwell time through targeted infrastructure, amenities and experience enhancement to improve spending into the local economy.

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[12] Stats denoted as Outback Queensland includes aggregated stats from North West, Far West, Central West, South West and East

[13] Tourism Data Explorer v2.5, Tourism Events Queensland

[14] In 2014, Tourism Research Australia (TRA) moved to a new methodology for the NVS that included mobile phone interviewing as part of a dual frame overlap survey. The 2014 and 2015 National Visitor Survey data, including the data for the year ending June 2016, has been back-cast by TRA.

[15] It was confirmed by the Project Reference Group that day trip visitation would not be filtered by dwell time. The standard metrics by Location Insights would be adopted as filtering the visitation could remove genuine visitation to the NWQ region.

4.3.4 Overnight vs day trip visitation

Domestic overnight visitation for Outback Queensland fluctuates as can be seen in the table below. The number of visitors for FY2016 and FY2017 are the highest among all previous periods. The number of nights spent in the region by domestic visitors has increased significantly, withthe past two financial years showing a 31.12% increase over the previous 10-year period.

Table 7 – Outback Queensland year on year overnight visitor count[16]

Financial year		08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18
Overnight Visitors	Visitors (Total)	566,000	606,000	469,000	726,000	733,000	678,000	787,000	822,000	920,000	884,000
	Annual Change	-	7.07%	-22.61%	54.80%	0.96%	-7.50%	16.08%	4.45%	11.92%	-3.91%

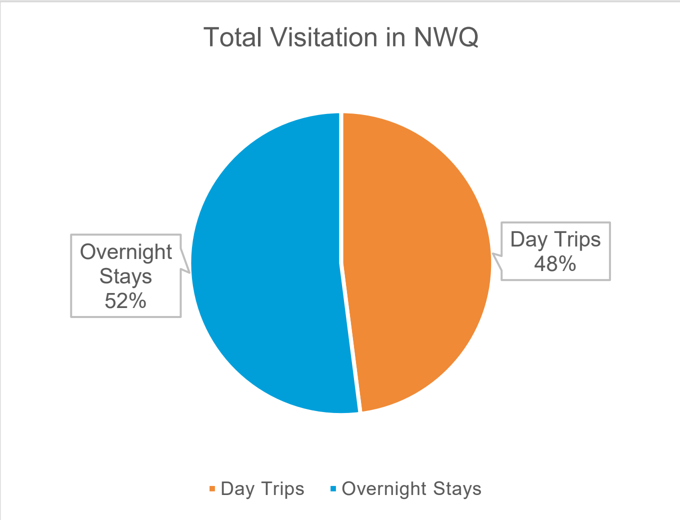

Figure 9 – NWQ Overnight and day visitation proportion

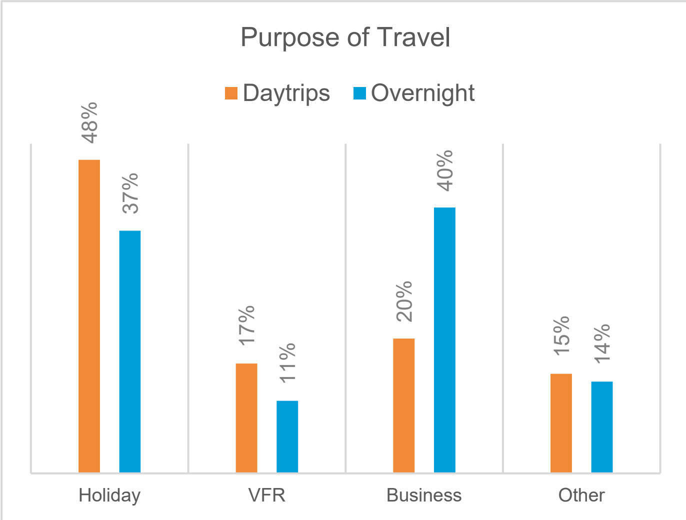

Figure 8 – NWQ purpose of travel

As shown in Figure 8, the total overnight trip count for NWQ is approximately 488,000, and 2,591,000 nights in 2017, which amounts to 52.03% of the total NWQ visitation count.

As shown in Figure 9, the highest purpose of travel for overnight visitation is for business reasons, followed closely by holiday, and visiting friends and relatives (VFR). This contrasts with day trippers as the primary purpose of travel is for holiday purposes.

The day and overnight trip breakdown shows a clear delineation of the key drivers for visitation for each market segments. Given the relatively even segmentation, there are opportunities for growth surrounding both day trip and overnight visitors. For day trip visitors, this may involve targeting experiences that foster a transition to overnight stays. In the context of overnight visitors travelling for business purposes, there are opportunities to improve current visitation experiences by promoting tourism offerings to extend and expand stays beyond business purposes.

To achieve this, strategies and initiatives should be targeted at these visitors and reconciled against the demographic profile set out in Section 4.2.6. These profiles highlight the current demographic and the preferences of the visitation segment.

[16] Tourism Data Explorer v2.5, Tourism Events Queensland

4.3.5 Length of stay

The length of stay is a key metric in understanding the potential contribution of visitors to the regional economy. The analysis undertaken provides a breakdown in the length of stay across NWQ and in doing so, assists in developing strategies that are aimed at increasing a visitor's time in the region.

While domestic overnight visitation has seen a 30% increase over the 5-years from 2013, the Average Length of Stay (ALoS) has decreased from 5.7 to 4.0 in 2017 and recovered to 5.4 in 2018. Which suggests ALoS within the region fluctuated over the years, the average 3-year trend is declining, and that visitors are spending fewer nights within the region.

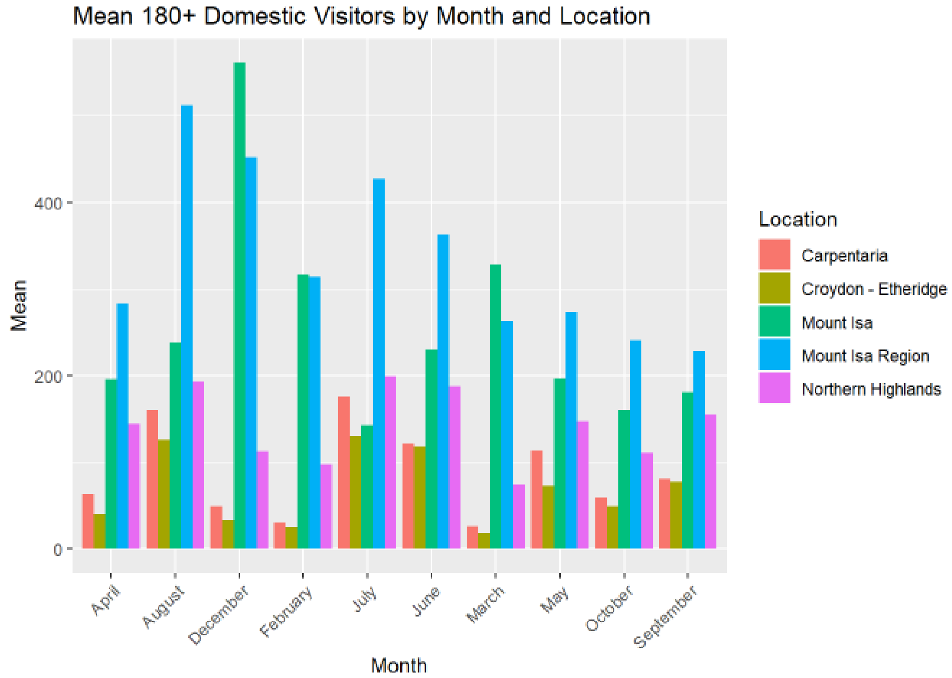

Figure 10 – NWQ Domestic visitation over a year

In the context of NWQ for financial year 2017/18, the Mount Isa and Mount Isa Region sees the highest average length of stay in NWQ, followed by the Northern Highlands. From a seasonal perspective, August and December represents the highest ALoS.

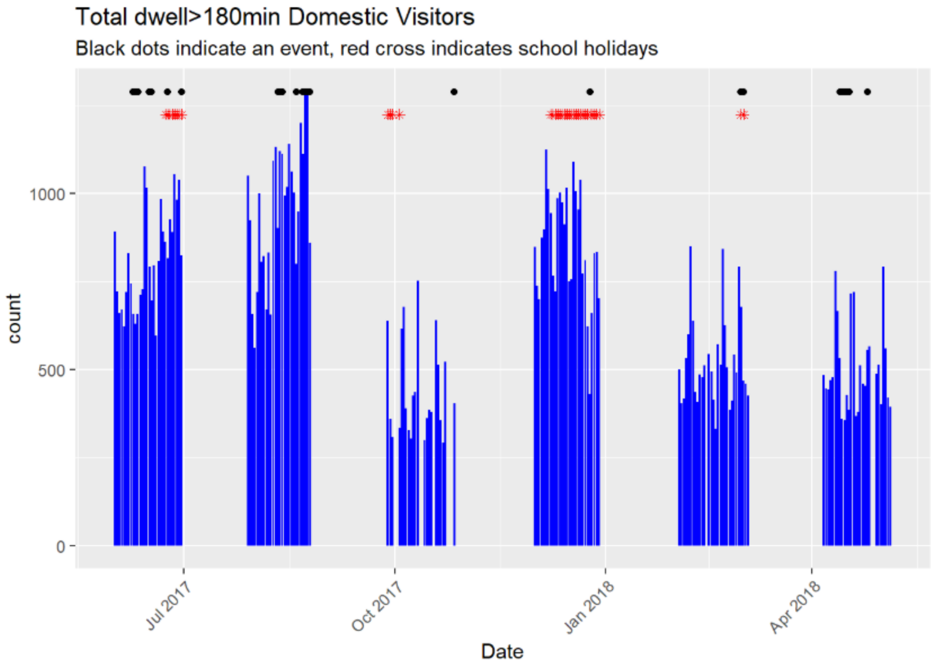

Figure 11 – NWQ domestic visitation dwell time trend

The analysis, as shown in Figure 11, identifies that domestic ALoS is heavily driven by events (indicated by black dots) and, school holidays (indicated by red crosses). For example, peak ALoS occurs during the August to September period where major events such as the Mount Isa Rodeo occurs, and during the December school holiday periods.

Case study on the impacts of events: Mount Isa Rodeo

The Mount Isa Rodeo (Rodeo) is an annual week-long event generally around mid-August, with the intent to generate new economic activity, and raising the profile of Mount Isa and Outback Queensland as “Rodeo Capital of Australia”. Visitation statistics are reported by the event, however, these are overall counts and do not distinguish between residents and non-residents.

For the purposes of the survey, it is important to understand the non-resident visitation to the Rodeo and other events in the region. Defining the impact of events such as the Rodeo helps understand certain types of activities that drive visitation. In doing so, strategies can be developed to leverage the success of events to increase length of stay or creation of new and complementary events in the NWQ region.

Analysis of the 2017 Rodeo’s non-resident visitation suggests that event-goers began to arrive a few days before the Rodeo, peaking at approximately 4,550 non-resident visitors during the main event, and subsequently declining in about three days after the event as shown in Figure 12.

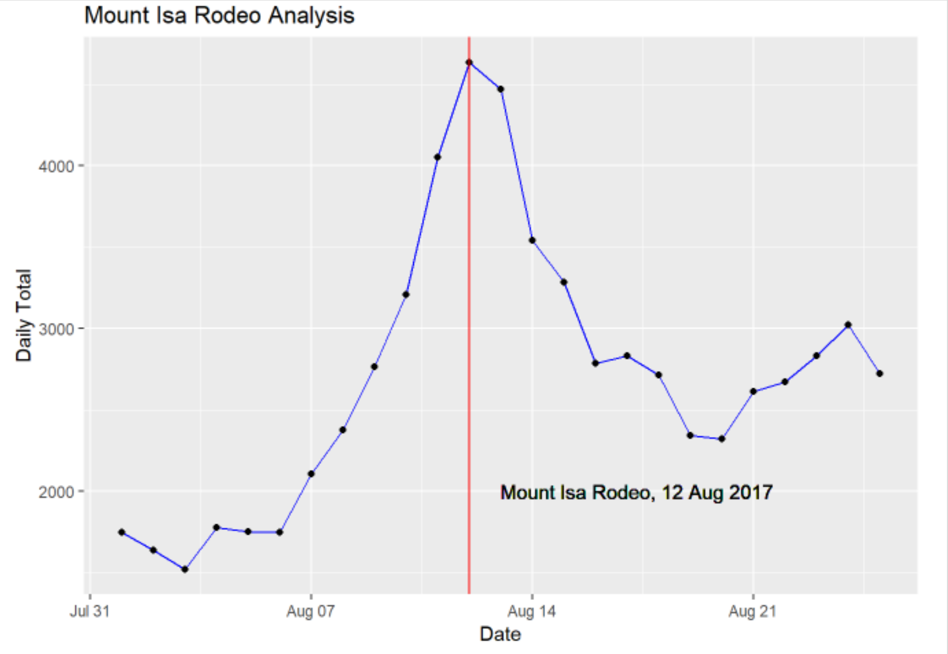

Figure 12 – Mount Isa Rodeo analysis

The relatively sharp spike and subsequent drop in visitation highlights that the non-resident visitors are likely to be in Mount Isa predominantly for the Rodeo itself. The relatively short timeframe of higher visitation followed by the rapid drop-off presents opportunities to increase the length of stay.

There is the potential to leverage the success of the Rodeo by offering complementary events or promote other experiences within the NWQ region with the intent to broaden the length of stay. For example, the Birdsville Races held after the Mount Isa Rodeo on 30 August – 4 September experience a small increase in visitation, however does not capture a large majority of visitation peak from the Rodeo event.

The success of the Rodeo demonstrates the impact of events on the region. Seeking an increase in non-resident attendees to the Rodeo can be an entry point to gaining new visitors to the region. Complementary activities and appropriate facilities to service event goers could further increase the overall length of stay and improve the overall Outback experience.

Understanding the visitation seasonality and its key drivers informs efficient and effective planning to focus planning efforts for peak periods to capitalise peak visitation, and to assess complementary offerings during lower periods to drive visitation into NWQ. The intent of these measures is to balance the visitation and enhance length of stay across the entire year as a mechanism to increase expenditure and contribution to the region's economy.

4.3.6 Demographic profiles (Helix Persona)

Helix Personas are a customer segmentation and data integration tool that combines psychographic and behavioural data to classify the Australian population into 56 personas and seven communities. The intent of the helix persona is to identify and personify the demographic to effectively identify and offer insights to cater service offerings to a targeted catchment area. Importantly, understanding the demographic and socio-economic profile facilitates tailored tourism events, activities, and strategies that are responsive to the visitation base.

Top 5 helix by location

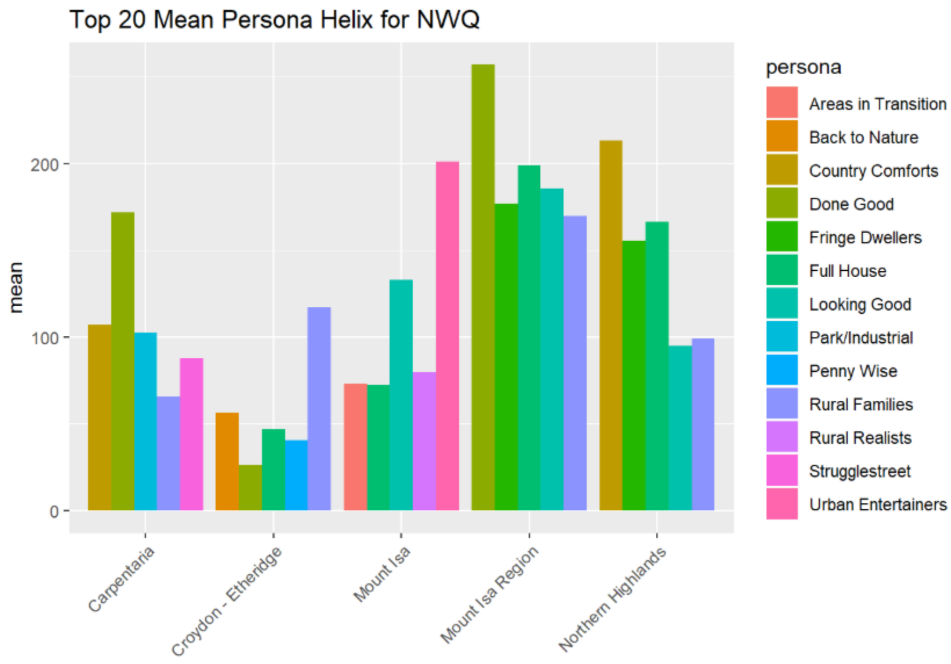

Figure 13 – NWQ Top 20 Persona Helix

The analysis captures persona counts when visitations are at the highest to provide a meaningful representation of persona for NWQ. The top personas for each region is tabulated in the table below.

Table 8 – NWQ top persona helix per each sub-region

Region	Description
Carpentaria	**Done Good** Closest to the average Australian, these young, educated, outer suburban families are working full time to pay off their expensive separate house. Well educated, above average income, fulltime working and confident couples/married.
Croydon – Etheridge	**Rural Families** Mostly Aussie-born, these struggling young families, single mums & retirees are focussed on making ends meet Confident, generally well-educated mid-life married/de facto, located predominantly in rural areas and earning average incomes.
Mount Isa	**Urban Entertainers** Well educated families, typically living in a semi-detached house in the metro suburbs Young, single, well educated, inner city professionals with high incomes, typically renting apartments. Cultured, connected, clued-in & cashed up.
Mount Isa Region	**Done Good** Closest to the average Australian, these young, educated, outer suburban families are working full time to pay off their expensive separate house. Well educated, above average income, fulltime working and confident couples/married.
Northern Highlands	**Country Comforts** Young parents or older families with children still at home, outer suburbs, bargain hunters. Agricultural workers, up to date with technology, average income, enjoy working long hours.

Broadly, there are commonality in persona category across all five (5) NWQ sub-regions. The analysis demonstrates that there are personas typified by:

- well-educated individuals with an overall average to above average income status, mainly only differentiated by rurality and locality
- individuals that are middle to lower income, living in rural areas and enjoy rural lifestyles

The persona profile indicates that there is a mix of business and leisure travellers visiting NWQ. This is represented through high percentage visitation from Done Good, Country Comforts, and Urban Entertainers personas with socioeconomic commonality as well-educated, fulltime working couples with average to high income. The top personas share similarity in preferences and interest such as the desire for indulgent accommodations and places to escape and relax with flexible options and price points[17]. They tend to seek new experiences and have the flexibility to visit the region both for work and leisure.

The profile of the personas identifies the likely interests of these individuals and establishes clarity in the socio-demographic profile of visitors. The segmentation of personas and visitation profiles for each sub-region facilities the ability to develop tailored strategies through an understanding of the drivers and interests of individuals. This can be utilised to capture each individual market effectively, and efficiently to maximise and capitalise visitation.

4.4 International tourism trends

The NWQ region, and its cultural heritage and natural environment represents one of Outback Queensland's tourism hubs for international visitors.

International visitation to NWQ remains a significantly smaller share of visitation to when compared against domestic trends. Specifically, international visitation has ranged within the 2% range of total visitation to NWQ. The Location Insights data has indicated that for the time period of analysis, the international market represented 2% of visitation. Within this international profile, visitation has remained consistent over a six-year period from 2011 to 2017 as set out in Table 9.

Table 9 – Outback Queensland international visitation count[18]

Financial year		07/08	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17
International Visitor	Visitors (Total)	34,000	33,000	31,000	28,000	25,000	25,000	26,000	27,000	26,000	26,000
	Annual Change	-	-2.94%	-6.06%	-9.68%	-10.71%	0.00%	4.00%	3.85%	-3.70%	0.00%

The findings presented in Section 4.4 should be considered in the context of the low representation of international visitors to the overall tourism profile of NWQ. Therefore, opportunities associated with international visitation may represent a longer-term focus in comparison to the domestic market.

4.4.1 Country of Origin

The country of origin provides a targeted view of the specific geographic regions from which international visitors have travelled. Key international markets to the NWQ region are dominated by the western market, mainly from Europe followed by Asia, New Zealand, and the United Kingdom. The European market (including the UK) accounts for 4 in 10 international visitors to the region.

[17] Helix Persona overview, Roy Morgan Research
[18] Tourism Data Explorer v2.5, Tourism Events Queensland

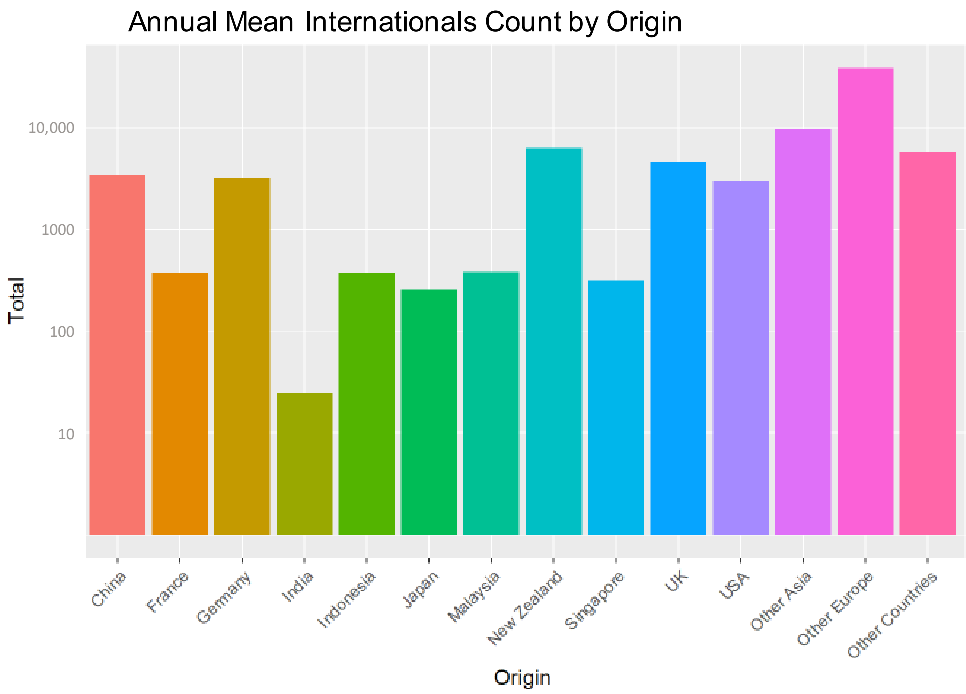

Figure 14 – NWQ total country of origin visitation count

While there is a mix of international origin destinations, it is important to note that the international visitation numbers remain a small component of overall visitation. This smaller contribution of international visitation does represent an opportunity to grow market share, however, it also provides challenges in increasing brand awareness amongst international visitation. The lower levels of visitation may be attributed to a range of reasons across awareness, access and time (given the distance required to travel).

Beyond the overall international visitation profile to NWQ, Figure 15 details the count of visitation by country and sub-region.

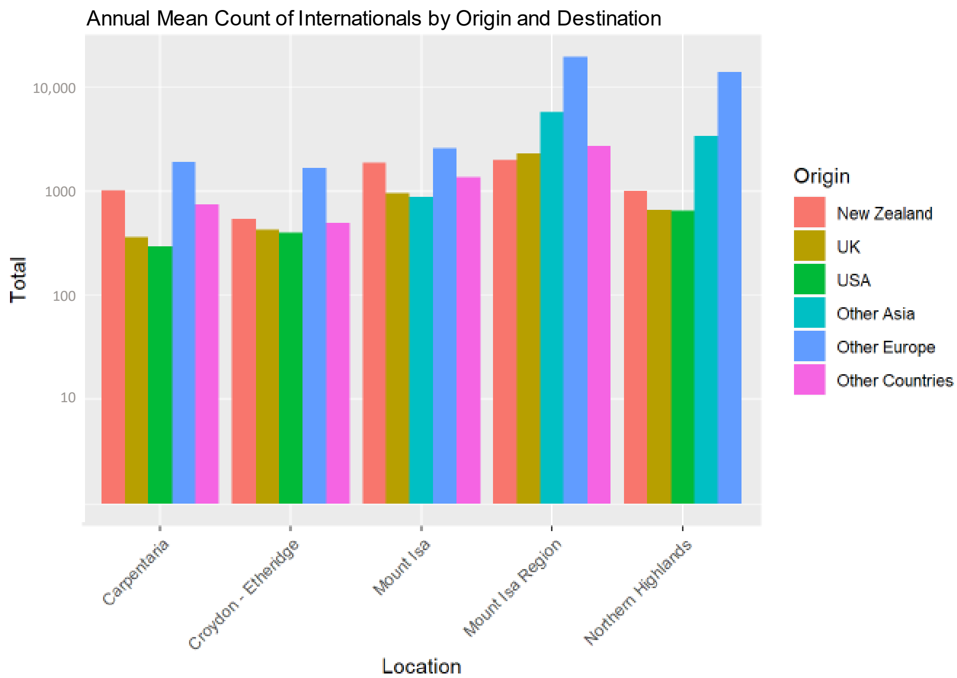

Figure 15 – NWQ annual count of international origin

Within each NWQ sub-region, the international visitation profile remains consistent with the overall profile of the NWQ and across each sub-region. It does not indicate that a particular source market favours one area over another. The analysis has also identified that there is also a high representation from the western market with a significant proportion arriving from “Other Europe” and the United Kingdom.

4.4.2 Visitation concentration

International visitation is less impacted by seasonal variance in comparison to domestic visitation. This is reflected through relatively consistent (low) visitation over the year with the exception of the winter period.

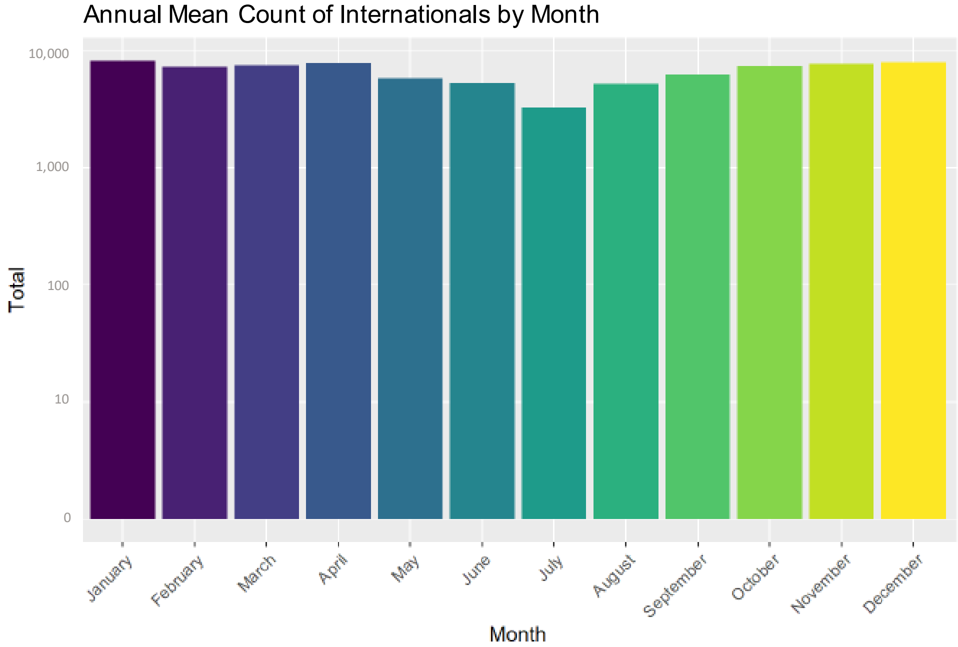

Figure 16 – NWQ international annual visitation count

The analysis above has been undertaken to impute between time periods (in order to project a complete year’s visitation). While the highest levels of international visitation are connected with the Australian summer, the overall pattern remains somewhat consistent for the year.

Dispersal for international visitation closely reflects the domestic trends in that the Mount Isa region attracts the most international visitors, followed closely by the Northern Highlands. It is likely that international visitation density is mainly clustered around the Mount Isa Region as it is a key concentration of infrastructure, facilities, and services.

The outputs of visitation and dispersal demonstrate that the international market represents a small portion of overall visitation to the NWQ region. Strategies to enhance international visitation should first focus on enhancing visitation before addressing the issue of dispersal. Increasing visitation from its relatively lower base should be the primary driver given the current profile of visitation. Dispersal can be targeted once a higher level of visitation is achieved.

Increasing international visitation should focus on the markets listed in Section 4.3.1 and predominantly, the western markets. Given that accessibility can be inferred as a key driver for travel, there is the potential to target international from Cairns. This would leverage Cairns’ status as an international tourism destination as a mechanism to identify visitors to Outback Queensland.

4.4.3 Length of stay

Despite an overall decline of international visitation into the Outback Region, Tourism and Events Queensland reports that the ALoS for the region remains stable over the years at 18.9 nights per trip.

Of relevance, longer visitation occurs during the June to August period, whereas, the month of October to April experiences a shorter length of stay. This is suggesting that whilst visitation counts are higher during the October to April period, visitation during these periods are shorter.

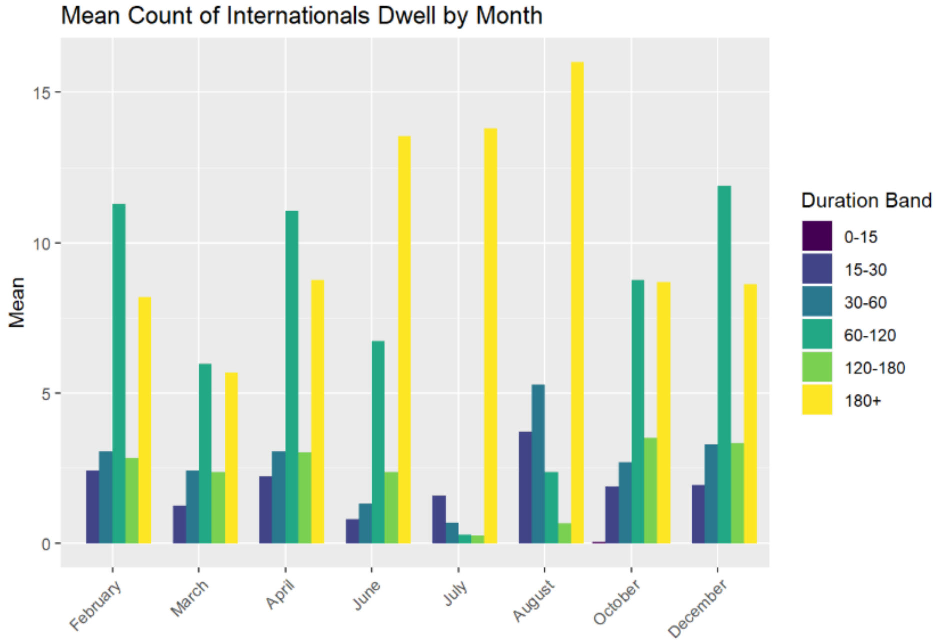

Figure 17 – NWQ monthly international dwell time

Further to this, the average length of stay is higher within the Mount Isa Region, Mount Isa, Carpentaria, and Croydon. In contrast, the Northern Hilghlands experiences shorter ALoS, which potentially suggests that whilst visitation counts for Northern Highlands are high, there may be lack of tourist link attractions around the Northern Highlands region to encourage longer stays.

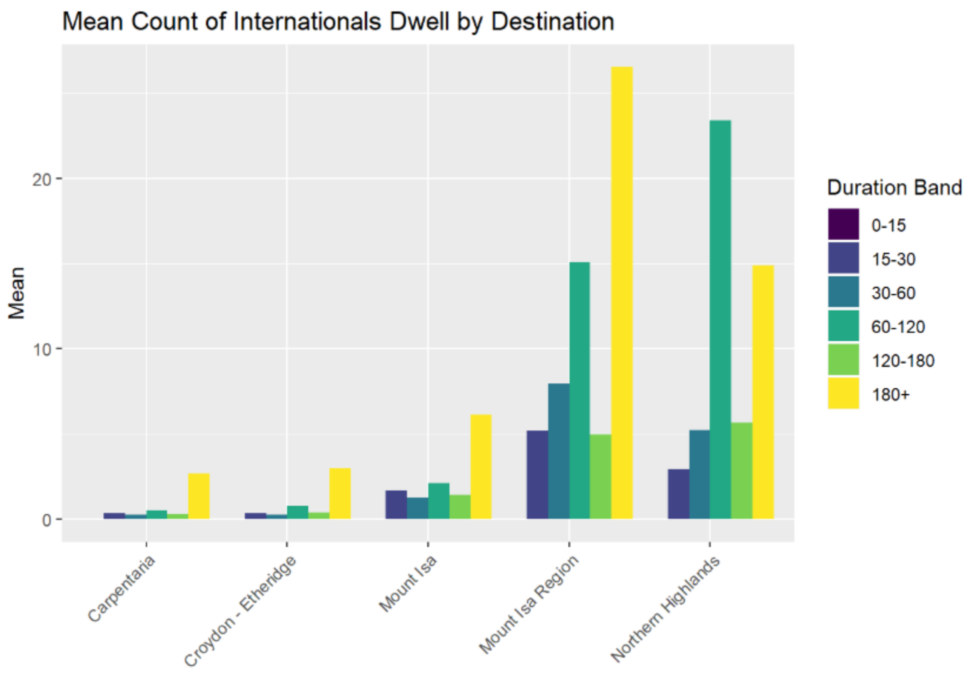

Figure 18 – NWQ international dwell time by destination

The dwell time for each NWQ sub-region outlines the movement within each region. Northern Highlands has the highest average length of stay for the 30 to 60 minutes duration band, suggesting that Northern Highlands has lower dwell time but forms an integral connection into key regions with higher dwell time such as the Mount Isa Region. This further suggests opportunity to capture the high movement volume within these regions through the development of tourism attractions and products to encourage longer length of stay for Northern Highlands as an example.

5 Opportunities and Context

Effective tourism planning needs to be based on analysis of the demands of the sector – growth in tourism numbers, diversity and expectation, economic, social and public interest considerations. An integrated data rich and coordinated approach to understanding the NWQ tourism landscape will assist in growing the tourism economy in delivering an evidence-based and accountable approach to inform future tourism investments for the Region.

The insights and higher-resolution data obtained as part of this survey enables a robust understanding of the tourism landscape in NWQ. Insights from this survey attempt to provide an understanding and confidence to tourism stakeholders, such as the community, operators, tourists, and the Government to make informed, evidence-based decisions to diversify the NWQ tourism industry.

Further, insights from this survey can be used to inform strategies that seek to enhance existing tourism products, experiences and infrastructure as a mechanism to enhance NWQ's tourism industry. For example, visitation trend information can inform events infrastructure planning for building tourism activity to complement current season extremes/peaks, local town planning, targeted marketing opportunities to improve the planning efficiency and safety for major events.

From this, given the output of this survey, Aurecon has developed a series of recommendations aimed at enhancing the tourism products and offerings within NWQ to improve the region's tourism competitive advantage to meet expanding market opportunities.

In pursuing this broader objective, a balanced and structured pipeline of targeted initiatives would represent an open basis for diversifying NWQ's economy through the growth of tourism.

Upon undertaking the range analyses from data obtained through this Survey, the recommendations focus on increasing the visitation numbers and increasing the length of stay. The recommendations are presented in Table 10 below and discussed in detail at Section 5.1.

Table 10 – Summary of opportunities

Reference	Timeframe	Opportunities
Capitalise on identified visitation insights to enhance the NWQ tourism industry		
1.	Short term to medium term	Encourage an integrated and coordinated approach to investment and marketing between Government and other stakeholders to ensure that the opportunities in NWQ are understood and promoted by the various investment attraction areas. Explore strategies and incentives to support enabling infrastructure to help regional areas become more efficient, competitive and attractive.
2.	Short term	Based on the Helix Personas and origin destination, target the specific market segments (geographically and personas) to increase new visitation to the NWQ region and convert day visitors to overnight visitors. This can include events, tourism products and experiences.
3.	Short to medium term	Establish complementary products and experiences that coincide with existing peak periods of visitation (such as event times) as a mechanism to increase the length of stay.
Improving dispersals and tourism attractiveness to attract investments		
4.	Medium term	Develop products and activities that seek to create a network of complementary experiences to encourage greater dispersal within NWQ. This could be captured as part of existing drive routes/strategies.
5.	Medium term	Encourage visitor dispersal through the development and delivery of new attractions in and between destinations, such as art installations along drive routes to minimise the perceived travel time between attractions and destinations.
6.	Medium to Long term	Assess policy and regulatory incentives to attract investment into NWQ. This may include initiatives such as concessions and grants that Governments can utilise as a mechanism to attract investment and development of tourism-friendly planning schemes and policies.
Enhance data collection and distribution		
7.	Medium to long term	Implement a region wide data sharing capability between VICs that is standardised in both data collection and methodology to obtain a robust set of data to better understand and inform region wide initiatives.
8.	Medium to long term	Establish a network of data providers between key stakeholders within NWQ such as the Mount Isa Airport, VICs, and accommodation providers. This will provide diverse data sources that can be utilised to develop a more holistic view of visitation over time.

5.1 Opportunities

Tourism is a whole of community business, supporting a range of economic activities and sub-sectors from accommodation and food services, to transport, travel and tour operators, arts, recreation, and retail.

Greater awareness and an enhanced understanding of the NWQ tourism profile and brand will support the attraction of future public and private investment to deliver new and/or improved tourism products, attract events, and create experiences for future visitors. This includes advocacy at all levels of government, industry and other key stakeholders.

5.1.1 Capitalise on identified visitation insights to enhance the NWQ tourism industry

The insights derived from the Survey provide a level of understanding of the tourism profile that has not previously been available, particularly through the Helix Persona profiles. Through this, the government, industry, local communities and other stakeholders can apply the insights from this survey to establish strategies that seek to increase visitation to NWQ. The combination of existing datasets, along with data acquired through this survey supports the identification of tourism products and experiences that align with the demographic profile of visitation.

Opportunity 1

Encourage an integrated and coordinated approach to investment and marketing between Government and other stakeholders to ensure that the opportunities in NWQ are understood and promoted by the various investment attraction areas. Explore strategies and incentives to support enabling infrastructure to help regional areas become more efficient, competitive and attractive.

Opportunity 2

Based on the Helix Personas and origin destination, target the specific market segments (geographically and personas) to attract new visitation to the NWQ region and convert existing day visitors to overnight visitors. This includes targeted events, tourism products and experiences.

Opportunity 3

Establish complementary products and experiences that coincide with existing peak periods of visitation (such as event times) as a mechanism to increase length of stay.

5.1.2 Improving dispersals and tourism attractiveness to attract investments

NWQ's unique tourist landscape offers a myriad of ecotourism, drive tourism, and paleo-tourism opportunities. The Survey has found that dispersal within the NWQ region represents an area of opportunity to drive tourism growth. Greater dispersal is likely to increase the average length of stay and achieve a greater appreciation of the region's unique and diverse landscape.

Currently, there are significant distances between major attractions in the NWQ region. Improving dispersal could be achieved by creating new products and experiences to build and fill gaps in interaries and drive routes that reduce the perceived travel time between destinations.

The case studies presented in this section demonstrate innovative ways that this has been achieved in other jurisdictions.

Opportunity 4

Develop products and activities that seek to create a network of complementary experiences to encourage greater dispersal. This opportunity can be captured as part of existing drive routes/strategies.

Opportunity 5

Encourage visitor dispersal through the development and delivery of new attractions in and between destinations, such as art installations along drive routes to minimise the perceived travel time between attractions and destinations

Opportunity 6

Assess policy and regulatory incentives to attract investment into NWQ. This may include initiatives such as concessions and grants that Governments can utilise as a mechanism to attract investment and development of tourism-friendly planning schemes and policies.

Case Study: Enhancing dispersal through attraction

Prada Marfa – Valentine, Texas

Prada Marfa is a permanent architectural sculpture installed 2.3 km northwest of Valentine, Texas on the U.S. Highway 90. The architectural installation is designed to resemble a nonfunctional Prada fashion boutique with the intent to attract and raise awareness to consumerism, luxury branding and gentrification. Since its installation, it has succesfully attracted thousands of visitors a year, despite Route 90's low traffic flow, the people that visit the art installation includes locals and internationals and has helped define the local landscape for the city of Valentine.

Social Pool – Mojave Desert, Southern California

Social pool is a functional swimming pool located isolated in the Mojave Desert. Despite its location which requires several hours drive from Los Angeles, and a long walking distance from the nearest road, it became a key attraction for visitors to Southern California. The intent of the social pool is an escapism art piece from the contemporary lifestyle of consumption and entertainment-driven lifestyle. Since its installation, it has attracted visitation to the art installation, and many travellers makes it an adventure to see the social pool in person. Reword last sentence

5.1.3 Enhance data collection and distribution

Visitation information data is a pivotal form of business intelligence that informs targeted tourism strategies and initiatives for the region. The Location Insights data acquired for this Survey has established strong baseline and new information. However, this information incurs a licencing cost, and there are opportunities to balance future acquisition of Location Insights data (only if required) with internal data collation capabilities. This, in turn, may minimise costs for future surveys.

Through enhancing data collection methods at existing VICs, such as utilising wi-fi surveys, there are opportunities to capture more granular data in the future. This includes demographic profile, origin, and capturing surveys that facilitate consistent year on year visitation trend data to track performance and used for further statistical modelling.

Further, by standardising methodology and consistency in data collected between multiple VICs across the region, this enables consistent robust data to be aggregated and to allow statistical modelling to inform tourism strategies for both NWQ and its sub-regions.

From this, aggregated data and statistical analysis can be shared regionally to improve regional understanding, which allows for targeted marketing offerings for different markets, and strategically distributing tourism information to enhance the tourism network in NWQ.

It is important to note that any actions with data collection should be considered against the various statutory privacy information frameworks to ensure that the privacy of information is maintained.

Opportunity 7

Implement a region wide data sharing capability between VICs that is standardised in both data collection and methodology to obtain a robust set of data to better understand and inform region wide initiative.

Opportunity 8

Establish a network of data providers between key stakeholders within NWQ such as the Mount Isa Airport, VICs, and accommodation providers. This will provide diverse data sources that can be utilised to develop a more holistic view of visitation over time.

A

Appendices

Appendix A
Helix Persona Definitions

Main category	Sub-category
Aussie Achievers Closest to the average Australian, these young, educated, outer suburban families are working full time to pay off their expensive separate house.	Done Good Well educated, above average income, fulltime working and confident couples/married. Castle and Kids Married with children, living in a separate house in the outer suburbs/rural, above average income. Domestic Jugglers Mid-life households, proud of their home which they generally own Family First Suburban separate house, well-educated married/couples working fulltime, earning average income.
Leading Lifestyles High income families, typically own their own home in the inner suburbs.	Blue chip High income families, typically own their own home in the inner suburbs. Smart Money Well educated, high income professionals, tech-savvy, typically married with children living inner suburbs. Self-made lifestylers Well educated, family life, paying off the home. Status Matters Young families, tech-savvy, fashionable, expensive lifestyle. Financial freedom Suburban separate house, family life, tech-savvy. Worldly and Wise Well educated, inner suburb, older households, typically live in an expensive separate house which they own. Humanitarians Well educated professionals, high income, inner city home, tech-savvy, small household. Successful Bureaucrats Well educated workers, young families/couples, typically paying off their home. Progressive Thinkers Older households, typically own their middle/inner suburb home, technology mainstream, well educated. Savvy Self-starters Inner-suburb home owners, older families, middle income. Set for Life Older, well-educated suburban households, typically retired, social, confident. Full House Married, rural living, paying off their separate house.

Main category	Sub-category
Metro-techs Young, single, well educated, inner city professionals with high incomes, typically renting apartments. Cultured, connected, clued-in & cashed up.	Young and Platinum Well educated, high income, inner city professionals, typically renting apartments and flats. Healthy, Wealthy and Wise Well educated, high income, inner city workers, typically renting apartments and flats at a high cost. Social and health conscious New School Cool Well educated, high income, inner city living and working, very social, tech savvy. Fit and Fab Young singles, renting flat/unit/apartment inner city, love social and sporting activities/entertainment Social Flyers Young, single, social and fashionable inner-city renters. Big Future Well educated inner city renters, focused on their job, their health and improving their education. Urban Entertainers Well educated families, typically living in a semi-detached house in the metro suburbs Cultural Pioneers Inner city flat/unit/apartment renters. Well educated, tech-savvy and social. Social Academics Young students renting in the city with housemates. Interested in socialising, technology and their health. Quiet Achievers Inner city flat/unit/apartment renters, tech-savvy, fashionable young families.
Today's Families Young families in the outer suburbs, living up to their above-average incomes. Their beloved gismo-enriched home is the nucleus of their family.	Rural Realists Young families living in a separate house predominantly in rural areas. Generally renting and enjoy entertaining. Career & Kids Well educated, younger families working full time and paying off their suburban homes. Looking Good Inner city families working fulltime, paying off their expensive separate homes. On Their Way Young urban families living in separate houses which they are paying off with their above average income. Successful Immigrants Outer suburbs, tech savvy, social, hardworking young families. Average Aussie Young families living in the outer suburbs earning average income.

Main category	Sub-category
Getting By Young parents or older families with children still at home, outer suburbs, bargain hunters.	Urban Optimists Outer suburb mid-life families, long working hours in skilled/semi-skilled jobs to pay for private education for children. Country Comforts Agricultural workers, up to date with technology, average income, enjoy working long hours. Making Ends Meet Large young families, one parent working skilled job while the other looks after the kids, renting in cheap metro areas. Budget Lifestyle Young Singles or Couples, lower income renting in the suburbs. Aspiring Immigrants Low income young families or unemployed students still at home, inner suburbs. New Australians Well educated, confident, inner suburb renters of flat/unit/apartment. Young parents both working and earning below/ average income. Making the Rent Low income, inner city/suburb singles living with parents. Rural Traditionalists Older married living in rural areas, either working in agriculture earning average income or retired. Doing it Tough Suburb renting separate house, young large families/living with parents, home duties or part time/casual workers, uneducated.
Golden Years Conservative, risk-averse retirees focused on health, security and maintaining an income from investments or the pension, even if they're mortgage-free.	Rural Rewards Older households living in predominantly rural areas where they own their own home and kids have moved out. Back to Nature Older households who have retired or plan to soon move to their beach home which they own. Country Conservative Hard working agricultural/farmers living in rural areas earning low income, not confident and live a very traditional life. Fringe Dwellers Middle-older aged single, renting semi-detached house in cities/towns. Generally, well-educated but on a low income or not employed. Frugal Living Elderly, retired households living in cities/towns/rural where they own their own home. They either live with their spouse or are widowed and live alone. Twilighters Elderly, retired living in suburbs close enough to the city and children/grandchildren. Very traditional, widowed.

Main category	Sub-category
Battlers Mostly Aussie-born, these struggling young families, single mums & retirees are focussed on making ends meet. Many are welfare dependent.	Penny Wise Mid-life married living in rural areas paying off their separate house, like to live cheap/save money. Rural Families Confident, generally well-educated mid-life married/de facto, located predominantly in rural areas and earning average incomes. Out of Towners Confident, mid-life families or students living with parents living in rural areas where they own their own home and like to show it off, tech-savvy. Areas in Transition Singles renting flat/unit and living alone close enough to the city where they work earning an average income and go out to restaurants. Real Working Class Low income but still confident, married without children with generally one income earner. Still Working Unconfident, older married households living in rural areas, generally one worker earning low income and one retiree. New Beginnings Well educated, suburb renters, young married with children, semi-skilled profession on a low salary or still studying and looking for a job. Strugglestreet Young single parent, renting in towns, unemployed and looking after children. Coupon Clippers Traditional Families living in urban areas renting a separate house. Typically, low education and not employed/at home with kids.

Appendix B
Methodology to filter non-visitors

The data obtained has a home-work attribution model to filter non-visitors such as Fly in Fly out (FIFO), and Drive in Drive out (DIDO) workers to refine the visitation profile of NWQ. The home-work attribution model logs the most commonly frequented Statistical Area (SA) 1 area over a six-week historical period. The 'Home' SA1 is defined as the most frequented SA1 area between 7PM and 7AM on weekdays. Whereas, a 'work' SA1 is the area that is most commonly frequented between 7am and 7pm on weekdays. Additionally, a work SA1, that is within 500 metres of a home SA1, will be discarded.

The nature of FIFO rosters (e.g. 9/5-day rotation, 2/1 week on/off) is such that the majority of workers are located in the area for greater than 50% of the defined six-week period that is utilised to attribute the population. Therefore, many of these workers will have their 'home' and 'work' location defined as the relevant SA within NWQ as this will represent the most commonly frequented area due to the proportionate time spent in the region.

The home/work attribution model means that a residual level of FIFO workers may have been captured in the visitation counts. This may include those that spend less than 50% or less of the six-week analysis period on site.

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