Sub 66

central highlands
regional council

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28th May, 2010

RECEIVED
28 MAY 2010
Economic Development Committee

The Research Director
Economic Development Committee
Parliament House
George Street
BRISBANE QLD 4000

Dear Sir/Madam,

Reference: Submission – Inquiry into developing Queensland's rural and regional communities through grey nomad tourism

Council would like to thank you for your letter of 15th April regarding making a submission to the committee's inquiry into developing Queensland's rural and regional communities through grey nomad tourism.

Attached is Council's submission. We have kept the points brief. Attached also is a report providing very useful and up to date information on the tourism sector in this region in Central Queensland. This survey was part of a Council project, using a Federal Government grant, to develop strategic plans to develop tourism in this region.

If you require any further details please do not hesitate to contact me.

Yours faithfully,

Phil Brumley
General Manager
Governance & Community Services

Economic Development Committee
Issues Paper No. 3
April 2010

Submission from Council in relation to Issues for Comment

Below is Council's submission in relation to the questions in the Issues Paper. Central Highlands Regional Council recently carried out a feasibility study to expand tourism in the Central Highlands region of Queensland and this produced a number of findings that are relevant to this inquiry. Where useful, this background information is noted.

1. Grey tourism makes a very important economic contribution to this region. Capricorn Tourism advise that grey nomads constitute over 50% of the May – September period visitors into Central Queensland. Council's feasibility study indicates that 23.6% of visitors in this region are aged over 65 years and 40.4% are aged 46 to 65 years, which provides support for Capricorn Tourism's advice. It also supports the numbers in the Issues Paper Point 6.0 but suggests that perhaps a higher proportion of inland/outback visitors may be grey nomads.

   If we look at the holiday leisure market in this region, which is where grey nomads 'fit', they account for
   - 73,400 (or 42%) of the 175,800 visitors to the Central Highlands region
   - 375,000 (or 50%) of the visitor nights in the region
   - $16.8M (or 49%) of the $34.3M spent in the region by holiday leisure visitors and 18% of the total $94.9M of visitor expenditure (including business travellers and daytrippers).

   The expenditure by grey nomads contributes approximately $10M in value adding and generates the equivalent full-time employment of 136 persons for this region.

2. Council's feasibility study provides current, useful statistics for this region. This survey was necessary because this inland region lacked detailed information on tourism.

3. The obvious and immediate infrastructure needs include:
   - free parking in convenient locations in towns
   - clean and readily accessible public toilets
   - potable water and sullage points
   - rest areas with rubbish bins on highways
   - picnic areas in towns and at tourist attractions
   - free or low cost camping areas (with facilities including power, amenities, picnic areas, etc)
   - mobile phone (and internet) reception
   - decent roads, preferably sealed and in good condition
   - good signage, particularly in remote rural areas where maps, GPS and mobile phones can be inadequate
   - visitor information centres or other places such as shire offices or libraries providing information and advice

- public telephones

Apart from the obvious items above, there are expectations of there being in decent size towns:
- hospitals, doctors, chemists and other heath & 'emergency' services (eg police & ambulance) the event they are needed
- swimming pools
- libraries, with internet access

4. In general, we believe most of the infrastructure in this region is generally adequate taking into consideration that this is a very large regional area, with some somewhat remote smaller towns, and less resources able to be directed into the tourism sector. This is not to suggest that improvements are not required – on the contrary. There are many infrastructure improvements we recognise are needed to attract and better support and service visitors. However, it also needs to be recognized that visitors from the cities, and particularly capital cities, often have high and, in some cases, unrealistic expectations in relation to the standards and range of infrastructure and services in rural areas.

   In relation to this region, we believe that we support grey nomads reasonably well. We do have 3 towns that are 'RV Friendly'. There are caravan parks and camping areas in all towns and tourist areas and overnight stop areas on highways. We have visitor/tourist information centres on in the towns on the main highways with a wide range of information, linked to Capricorn Tourism and 'staffed' by local volunteers who are able to provide information and 'local knowledge'. The towns do have plenty of parking and picnic areas, the key roads are sealed and signposted. All the main towns have medical and emergency services, council support if needed and facilities such as libraries with internet access, various sporting options, fuel and shopping.

   Areas in which more needs to be done include:
   - upgraded roads with more and better signage and more rest areas
   - upgraded mobile phone services along highways, other key rural roads and in some rural towns
   - Signage providing advice when Information Centres are closed and after hours
   - Signage and advertising for visitors of part-time work opportunities
   - More sullage dump and potable water points

5. The major issue we have in relation to the regulation of caravan parks arises from the fact that in rural towns, a lot of the camping is in showgrounds, and most showgrounds are on reserve land that does not permit camping. Many towns have little or no camping alternatives. Additionally, these days large motorhomes sometimes cannot fit into caravan parks and so look for showgrounds which offer parking space, plus power, lighting picnic area and conveniences. The State Government needs to review the issue of what is permitted on showgrounds reserves and, ideally, allow camping that is controlled by local governments.

6. The best methods for distribution information include travel shows, travel guides, the internet, magazines, journalists, direct mail (to seniors publications), state and

regional tourism authorities, enews, signage, visitor information centres, newsletters, newspapers, visitors guides and on local maps.

7. Volunteering at the visitor information centres in this region has generally been very successful. Many grey nomads are unfortunately not eligible for many of the jobs programs. There are opportunities for relief work at various times of the year in this region but in many cases the grey nomads would need to have organized their work with the various employers before arriving in town. Importantly however, the continuing growth in the coal and gas industries in particular, which is driving growth in town populations and other businesses, has lead to a labour shortage, particular for people with trades and professional knowledge and skills. This is likely to continue to provide opportunities for grey nomads to find work in this region.

8. Taxation and potential impacts on pensions and other entitlements are key concerns for many grey nomads. Additional support needed includes information programs and community awareness on what opportunities are available, and resources to assist rural communities identify and establish programs.

Feasibility study to expand tourism in the Central Highlands Region

Volume 1: Tourism Strategic Plan

January 2010

Prepared for: Central Highlands Regional Council

CH central highlands regional council

Prepared by: Tourism Potential Pty Ltd and EC3 Global

TP TOURISM POTENTIAL

Executive Summary

The Central Highlands Regional Council (with Federal funding through the Department of Infrastructure, Transport, Regional Development and Local Government's Better Regions program) commissioned Tourism Potential and EC3 Global to develop a strategic plan to increase visitation to the Central Highlands, enhance the appeal of key attractions and places, and identify potential business development opportunities.

Prior to preparing the Strategic Plan the project team conducted a sample survey of over 260 Central Highland residents, a survey of 70 accommodation operators, and survey of 644 visitors at various locations throughout the Central Highlands over a period of four months, reviewed published and unpublished data, and consulted tourism operators and industry stakeholders throughout the Central Highlands and elsewhere in Queensland.

Based on the extensive research for the strategy, 326,000 visitors spent 1,128,000 nights in the Central Highlands, and together with 316,300 daytrips by residents, spent $95 million on goods and services in the region in the 2009 financial year. Expenditure by visitors supported the full time equivalent employment of 518 people directly and 780 people in total (directly and indirectly) in the region, or over 4 per cent of people employed in the Central Highlands. For the Central Highlands region, the 1.13m visitor nights is the equivalent of 3,090 residents for year end June 2009. This means that on any one night on average, 9.4 per cent of people staying or living in the Central Highlands region (visitors plus residents) were visitors.

The region's prime assets – the National Parks, Gemfields and dams – are the most popular and enjoyed most by visitors. Notwithstanding the distinctiveness and appeal of these assets, there are many regions throughout Australia competing actively for the time and budget of visitors.

Success for the Central Highlands as a visitor destination should be driven by (1) a recognition that the economic viability of providing visitor-related infrastructure, facilities and services, is achievable where both the community and visitors are part of the market mix, and (2) partnerships between the community, industry, tourism operators and government are essential as resources are scarce and each sector has its strengths to offer ("Dig the Tropic" is an example of recent partnership success).

The vision for tourism is:

A cohesive and profitable tourism industry focused on establishing the Central Highlands as a destination of choice by offering quality, distinctive and sustainable experiences in keeping with the community's lifestyle.

To achieve an increase in visitation, five objectives will need to be achieved, these being:

1. Establishing clear leadership, management and coordination,
2. Further development of existing and new markets and visitor communications,
3. Enhanced industry effectiveness (through alliances and partnerships),
4. Heightened awareness by Council, community and commercial groups of things to see and do in the region and benefits of exploring locally, and
5. Enhanced satisfaction and expenditure through further development of tourism product.

A series of high and lower priority actions are proposed for each of these objectives.

The eight top priority initiatives (not in order of importance) identified are to:

- Clarify roles and KPIs with Capricorn Tourism and Central Highlands Development Corporation to ensure focus and coordinated regional tourism marketing and product development,
- Enhance the capacity of the region to capitalise on the day trip and VFR markets by creating a local campaign: 3-4 things to see and do each quarter (Capricorn Tourism to provide copy and images) – extended to the Fitzroy region via the local tourism organisation (Capricorn Tourism) and memorandum of understanding for a Central Highlands specific campaign,
- Develop and foster new campaigns and markets (i.e., Dig the Tropic Education Program, National Geographic Partnership, backpacker travel to the region),
- Conduct a facility concept design and feasibility study for a Gemfields visitor, education and community Hub,
- Establish more interactive, informative, inspirational and user-friendly content for the existing visitor website(s),
- Enhance the capacity of the region to capitalise on the VFR/ day trip market by creating a low season campaign of incentives for locals to take their visiting friends and/or relatives to attractions around the Central Highlands,
- Encourage the backpacker and international touring markets - through establishment of basic backpacker-friendly accommodation facilities, new budget and adventure activities as well as incentive deals with Wicked/Apollo/Britz and campaigns with Greyhound, and
- Offer recreational and tourism options to mining camps and communities both within the Central Highlands and northern section of the Bowen Basin.

On the basis that these and other recommended initiatives are actioned and the objectives achieved, in 2012 the Central Highlands could benefit potentially from **an additional**:

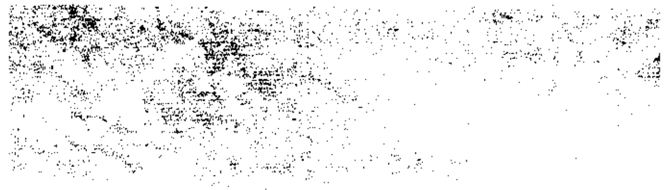
- 43,500 visitors,
- $8.8m in visitor expenditure,
- 65 additional FTE jobs (direct and indirect), and
- $5.3m in total value added (direct and indirect) to the region.

over and above what might be achieved by 2012 in the absence of such a strategy.

Contents

Acronyms

AAA	Australian Automobile Association (AAA Tourism)
BICC	Blackwater International Coal Centre
CHDC	Central Highlands Development Corporation
CHRC	Central Highlands Regional Council
CQ	Central Queensland
CT	Capricorn Tourism
DERM	Department of Environment and Resource Management
DMR	Department of Main Roads
FTE	Full time equivalent (jobs)
KPI	Key performance indicators
LTO	Local Tourism Organisation
MOU	Memorandum of Understanding
PPP	Private public partnerships
QPWS	Queensland Parks and Wildlife Service
QTIC	Queensland Tourism Industry Council
RADF	Regional Arts Development Fund
TQ	Tourism Queensland
VFR	Visiting friends or relatives
VICs	Visitor Information Centres



Disclaimer

The information and recommendations provided in this Tourism Strategic Plan are made on the basis of information available at the time of preparation. While all care has been taken to check and validate material presented in this report, Tourism Potential, EC3 Global or other project partners shall not be liable, in any way, for any loss arising from use or reliance upon material in this publication by another person.

1 Introduction

The Central Highlands Regional Council (with Federal funding through the Department of Infrastructure, Transport, Regional Development and Local Government's Better Regions program) commissioned Tourism Potential in association with EC3 Global to develop a strategic plan to increase visitation to the Central Highlands, enhance the appeal of key attractions and places , and identify potential business development opportunities. Prior to preparing the Strategic Plan the project team conducted a sample survey of over 260 Central Highland residents, a survey of 70 accommodation operators, and survey of 644 visitors at various locations throughout the Central Highlands over a period of four months to quantify the size of the tourism industry, and nature and characteristics of visitation. In addition, econometric modelling was conducted to determine the value of tourism to the Central Highlands economy. The project team also reviewed published and unpublished data, and consulted tourism operators and industry stakeholders throughout the Central Highlands and elsewhere in Queensland about issues facing the tourism industry and opportunities to stimulate additional, sustainable visitation of the region.

2 A situation analysis (where are we now?)

Tourism is an important part of the Central Highlands regional economy. In 2008/09, 326,000 visitors spent 1,128,000 nights in the region, and together with 316,300 daytrips by residents, spent $95 million on goods and services in the region. The Central Highlands region accounts for approximately 23 per cent of Central Queensland region daytrips and 25 per cent of Central Queensland visitor nights. Expenditure by visitors supported the full time equivalent employment of 518 people directly and 780 people in total (directly and indirectly) in the region, or over 4 per cent of people employed in the Central Highlands. For the Central Highlands region, the 1.13m visitor nights is the equivalent of 3,090 residents for year end June 2009. This means that on any one night on average, 9.4 per cent of people staying or living in the Central Highlands region (visitors plus residents) were visitors.

Expenditure by visitors supported the full time equivalent employment of 780 people (directly and indirectly) in the region – over 4 per cent of people employed in the Central Highlands.

2.1 Product, infrastructure and management highlights

Product. The region offers a range of distinctive attractions, including the Blackdown Tableland and Carnarvon Gorge National Parks, the Gemfields, dams (Lake Maraboon) and weirs (Bedford), mine tours, Capella Cultural Centre, events (Gemfest, Ag-Grow, Emerald Multicultural Festival) and the Blackwater International Coal Centre. Fifty-one hotels, motels and guest houses, and 18 caravan parks provide 2,380 rooms, sites and cabins across the region – hotels and motels predominantly in the main centres, and caravan parks at key places of interest.

Infrastructure. Emerald is a central service centre for travellers seeking services (i.e., medical and government service), supplies and vehicle repairs. Qantaslink operate 24 non-stop services between Brisbane and Emerald each week. Rail services (Spirit of the Outback) operate twice weekly stopping at towns between Duaringa and Bogantungan. Greyhound operates daily services to/from Emerald, Longreach, Mackay and Rockhampton. The region is traversed by the north-south Gregory/Carnarvon Highway (Great Inland Way) and east-west by the Capricorn Highway.

Management. Responsibility for regional management of tourism in Central Highlands is shared across CHRC (assistance with promotion of regional events, provision of infrastructure - information centres, signage, rest areas and camp sites, support tourism organisations and local business associations), CHDC (economic development and support for regional tourism initiatives) and Capricorn Tourism (production and distribution of Capricorn Holiday Planner and Central Highlands visitor guides, attendance at consumer and trade travel shows, special purpose campaigns and guides, cooperative marketing campaign opportunities, advertising and media, representation, operation of information centre). The Central Highlands Tourism Advisory Group (sub-group of Capricorn Tourism) and Great Inland Way committee represent the industry in the region.

Previous studies strategies. A range of tourism and related plans and strategies for or including the region have been prepared in recent years. The extent of implementation of recommended initiatives varies.

2.2 Tourism market highlights

Accommodation

As at 30 June 2009 there were 69 commercial accommodation properties (18 caravan parks and 51 hotels and motels) providing 2,380 rooms, sites and cabins for use by visitors in the region. In year end June 2009 this was used by 227,400 visitors staying a total of 737,050 visitor nights in the region.

In addition, and for year end June 2009, the 29,800 residents and 10,700 households in the Central Highlands region hosted 73,150 visitors staying 289,355 nights during the year. On average residents had visitors staying with them twice in the year.

Other types of accommodation visitors used include National Park camp sites, Council designated (free) overnight camping reserve sites, Showground reserves, improvised houses or tents occupied by short and long term stay visitors, and houses/flats/units (used by visitors only). These places provided 1,062 sites or units and were used by approximately 25,680 visitors staying 101,270 nights in the region.

The average length of stay of guests varies considerably, by accommodation type and area, with visitors in caravan parks staying on average approximately three times as long as visitors in hotels and motels.

Daytrips and Visitors Staying with Friends or Relatives

On average, residents of Central Highlands take 3 to 4 daytrips per month. Half of all daytrips were made to Emerald. The next most visited locations were to the Gemfields, Lake Maraboon/ Fairbairn Dam and Blackwater. For year end 30 June 2009, Central Highlands residents took a total of 316,300 daytrips and spent a total of $18.5 million on daytrips in the region, or an average of $58.50 per daytrip. The largest proportion of this, $5.5 million, was spent on fuel.

On average, Central Highlands households had visitors staying with them (visiting friends or relatives – VFR) twice in the year, with an average group size of 3.5 persons, staying 4 nights. For year end June 2009, the region hosted 75,150 VFR visitors staying 289,350 nights. They spent $7.8 million or $26.83 per visitor night in the region in year end 30 June 2009. The largest amount, $2.2 million, was spent on pleasure shopping/ gifts/ souvenirs.

The places visited by the largest proportion of VFR visitors were Emerald, Rubyvale, Lake Maraboon, Sapphire, and Blackwater. The most popular activities VFR visitors in the Central Highlands participated in were general sightseeing, eating out, shopping, picnics/BBQs, and fossicking. Specific features or places most VFR visitors enjoyed were the Gemfields/fossicking, Fairbairn Dam/ Dams/ Weirs, local areas/surrounds, Blackdown Tableland National Park, and Blackwater.

> On average, Central Highlands households had visitors staying with them twice in the year for an average of 4 nights and spending $26.83 per visitor night in the region.

Purpose of Visit

Just over half (54%) of all visitors were travelling for the main purpose of a holiday or leisure (175,810 visitors, including VFR visitors staying 750,055 nights). The balance visited for business, mining-related or commercial travel reasons.

Over half (56%) of holiday leisure visitors were from interstate, with almost one third (31%) from New South Wales. Forty-one percent of visitors were from Queensland, and one quarter was from South East Queensland.

Travel Party

One fifth (21%) of holiday leisure visitors were family groups (a travel party with one or more children aged 15 years and under). Only three percent of visitors were Younger Groups (with no children, and where most of the people in the travel party are aged 16 to 25 years). Half of all visitors were Middle-aged Groups (no children, majority of the people in the travel party aged 26 to 65 years). One quarter (26%) of visitors were Older Groups (no children, majority of the people in the travel party aged over 65 years).

Almost half (46%) of all visitors were first time visitors, the balance having visited the region previously.

Direction of Travel

The largest proportion (47%) of visitors to the Central Highlands arrived from towns and cities south of the region. Twenty-six per cent of visitors arrived from towns to the north, 15 per cent of visitors arrived from the east and 12 per cent from the west.

Accommodation Used

The largest proportion (43%) of holiday leisure visitors to the Central Highlands region stayed in a caravan (either at a caravan park, state or national park, or camping reserve). The next most significant form of accommodation used was staying with friends or relatives (41%). A relatively small proportion of visitors stayed in a hotel or motel (15%).

The places that larger proportions of holiday leisure visitors spent one or more nights at were Carnarvon National Park, Emerald, Blackwater area, Lake Maraboon, Sapphire and Rubyvale. A large proportion of visitors overnighted in two or more places in the Central Highlands during their visit.

Satisfaction with Visit and Suggested Improvements

Features that over half of all holiday leisure visitors rated as being very satisfied with included information services, local atmosphere, personal safety/security, and friendliness of locals.

Features that a relatively large proportion of visitors rated as being very dissatisfied with included roads, shopping, value for money, public toilets, and regular driver rest areas. The main features visitors enjoyed most about their visit to the Central Highlands were friendliness of hospitality/service/meeting locals, National Parks/Carnarvon/Blackdown/Minerva Hills, weather/ climate/warmth, visiting the Gemfields/Gemfest, and Lake Maraboon/Red Claw/Fairbairn Dam/ Bedford Weir.

The main features of the visit to the Central Highlands visitors were not happy with included expensive shopping in town/food/coffee/liquor, state of roads/broken edges/dangerous shoulders, and availability/variety of good food/meals.

The improvements suggested by the largest proportion of visitors involve better rest areas, roads, tourist drives and emptying rubbish bins.

Expenditure in the Region

Holiday leisure visitors to the Central Highlands spent a total of $34.3 million (36% of total visitor expenditure) in year end 30 June 2009, or an average of $45.70 per person per night. Approximately $9 million was spent on accommodation, followed by $6 million on fuel, $6 million on groceries, $5 million on shopping and gifts, and $4 million on takeaway food, drinks and meals.

Most of the expenditure ($18 million) was spent by visitors staying in caravans, followed by $8 million by visitors staying in hotels and motels, and $8 million by visitors staying with friends or relatives.

For year end June 2009, visitors spent a total of $94.92 million in the Central Highlands region - $34.3 million by holiday leisure travellers, $42.1 million by business travellers, and $18.5 million by resident daytrippers.

While business travellers account for one third of visitor nights, they spend almost two and one half times ($111.48) as much per visitor night as holiday leisure travellers ($45.75), and account for 44.5 per cent of total visitor expenditure in the Central Highlands region. While business travellers spend more per night on travel related items (accommodation, food, car hire, etc.) they spend considerably less on recreational items such as fishing and fossicking gear and supplies, tours, entrance fees, etc.

For further detail, see Volume 2 of the Strategic Plan – "Size, nature and value of tourism to the region".

2.3 Key implications

- The Central Highlands currently benefits from 'through traffic' of long trip visitors due to its central location on the Gregory/Carnarvon (Great Inland Way) and Capricorn Highways. Just over half of all visitors are repeat visitors. Therefore, the region will need to maintain a competitive range and standard of accommodation, attractions and services to remain a 4-5 night stay destination, rather than a 1 night transit stop.
- The region's prime assets – the National Parks, Gemfields and dams – are the most popular and enjoyed most by visitors. Therefore, investing in the promotion and sustainability of these assets will be important for increasing visitation and encouraging longer stays to the region.

The region's prime assets – the National Parks, Gemfields and dams – are the most popular and enjoyed most by visitors.

- The location of key tourism assets, and predominance of holiday leisure accommodation in the Gemfields and Southern areas of the region reinforce the strategic focus and importance of these areas as regional tourism anchors, with assets in eastern, northern and central parts of the region having a tactical role.
- Some travellers want more free caravan sites, longer stay free sites or free sites with more amenities. While these travellers do spend money on fuel and groceries in the region, it's not clear what the net cost/benefit to Council may be in providing and managing the 3 designated free caravan/camping sites.
- Visitors travelling with and staying in caravans are the predominant holiday leisure market for the region at present. Maintaining market share or increasing visitation requires attention to features conducive to the travel needs and interests of this market, such as well placed and maintained rest areas, consideration of van access and parking to shopping and services, and comprehensive and accessible pre and in-trip information on services, attractions and tours.

3 Rationale (why have a tourism strategy?)

Tourism is a collection of products and experiences

A holiday is an unusual product - it consists of a range of experiences over a period of time during the person's trip away from home. In this case, what a visitor is buying is a visit to the Central Highlands region, which may include many varied elements:

1. Walking in a National Park,
2. Buying petrol at a service station,
3. Eating meals from cafes and take-away shops,
4. Staying in a caravan park,
5. Visiting an interpretive centre or museum,
6. Attending an event,
7. Picking up supplies from the supermarket, chemist or newsagent,
8. Stopping to appreciate public art,
9. Fishing in a dam or river,
10. Using a recreation centre or community swimming pool.

The list is extensive. Visitors buy or have a collection of experiences, all of which influence the enjoyment of the overall trip (and often, how much time and money they spend in a region). Further, many aspects of the visitor experience involve community facilities and public assets, as well as individual commercial businesses. This diversity of stakeholders involved in providing the visitor experience, and widespread economic impact of where visitors spend their money, are reasons why government has a role in the marketing of the Central Highlands as a destination of choice, and fostering the development of visitor infrastructure and products.

The industry is defined by what the consumer buys, rather than what a producer sells

It is also the reason why tourism does not fit the conventional definition of an industry. Tourism is defined by what the consumer buys, rather than what a particular producer sells. Unlike a mining company that produces and sells coal, or a supermarket than aggregates and sells groceries, there is no one tourism company that provides or sells all the goods and services a visitor uses on their visit to the Central Highlands.

Council benefits directly and indirectly from tourism

Leaving aside lifestyle attributes associated with community facilities and activities that visitors can both contribute to and draw on, the return on investment in tourism Council receives is generally not direct in the form of a user (visitor) pays system for services, but indirectly through rates and charges paid to Council by businesses and organisations providing goods and services to visitors. Therefore, Council benefits each time a new business providing goods and services to visitors is established, as well as when non-commercial initiatives are introduced that extend a visitor's length of stay and expenditure (across a range of businesses) in the region.

The impact of tourism to the Central Highlands economy and community is broader than most other industries, since visitors buy products and services across many different industries (in fact, the majority of their expenditure in the region is on goods and services other than accommodation, food and beverages).

Tourism creates employment in a wide range of industries across the community, and employs more people per dollar of business turnover than many other industries.

While tourism (and all other industries in the region) is dwarfed by the mining industry in size, tourism creates employment in a wide range of industries across the community, and employs more people per dollar of business turnover than many other industries. Tourism supports 4.6 per cent of employment in the region.

The Central Highlands offers several distinctive assets enjoyed by large proportions of visitors

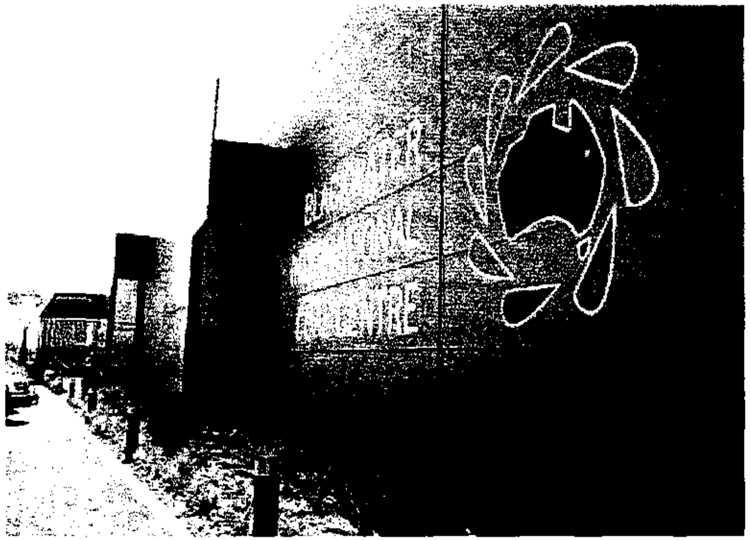
The Central Highlands as a visitor destination offers many strengths, including nationally recognised icons in the form of Carnarvon National Park (and other National Parks), and the Gemfields.

The two places nominated by the largest proportion of visitors as being the most enjoyable during their visit are the Gemfields and National Parks. In addition, there are substantial, well-equipped facilities at the Blackwater International Coal Centre, and Capella Cultural Centre and Arena. There are also the recreation areas of Lake Maraboon, Bedford Weir, and Botanical Gardens – all popular with both visitors and residents. Another key strength is that the region is bisected by two significant highways and visitor routes, with Emerald providing a hub and range of visitor services for travellers.

Destination success for the Central Highlands is the result of playing to its distinctive strengths together with partnerships between the community, industry, tourism operators and government.

Key challenges facing the industry

Notwithstanding all of the region's assets, it faces the challenges of seasonal demand associated with the weather and travel patterns of the dominant markets, pressures from a dominant industry (mining), pressing demands on capital and resources in both the private sector and local government, varying product and service standards, and remoteness of key assets along with limited infrastructure (i.e., the road into Carnarvon National Park, and visitor and community facilities in the Gemfields) – all of which impact on the ability to deliver a quality and distinctive visitor experience and increase visitation in the future.



Drivers of tourism success in the Central Highlands

For the Central Highlands, there are two key drivers of destination success. First, virtually all of the region's premier tourism assets are also significant community or public assets, used by both visitors and residents in large measure. The key is recognition that in many cases, the economic viability of infrastructure, and facilities providing goods and services, is achievable where both the community and visitors are part of the market mix (and recognition that the cultural, natural and industrial fabric of the community and area often forms part of the distinctive identity and experience visitors seek).

The second driver of success of a visitor destination is partnerships – between the community, industry, tourism operators and government. Resources are scarce and each sector has its strengths to offer – the key is identifying these and mapping a practical collective forward plan. A recent example is the "Dig the Tropic" program, which has successfully involved a range of stakeholders within and outside the Central Highlands, and across both the private and public sectors.

In a State and country where destinations compete intensely for the attention of visitors, Council, the community and tourism operators in the Central Highlands need to play to their and the region's strengths. These include working with the mining industry as (i) it is the dominant driver of the regional economy, (ii) its employees are a potential market, (iii) mining activity is an attraction in itself, and (iv) mining companies generally are interested in supporting community initiatives. In addition, the region offers a range of tourism assets. Some are significant and distinctive (the Gemfields and National Parks), some are popular (dams, fishing, local towns), while other assets are under utilised (i.e., southern sections of the Arcadia Valley, community art and craft, events, etc.).

Investment that builds the region's attractiveness as a lifestyle, investment and family place is key

Maintaining the status quo in tourism is an option, however, it means the Central Highlands may not remain a destination of choice, and experience a decline in its share of Central Queensland's holiday leisure visitors. Further, investing in infrastructure and promotion that builds the region's attractiveness as a lifestyle, investment and family place will also benefit tourism by creating recreational places and things that add to and promote 'liveability'. A tourism strategy can draw together what at times can be disparate participants (businesses, community groups, public asset managers, travel groups, etc.) to develop and promote a distinctive and cohesive visitor destination. Identifying opportunities to build existing and attract new markets, and stimulating development of new and appealing experiences and products, will help the Central Highlands maintain a position in a competitive marketplace, enable the region to maintain or extend the bottom line benefit of increased visitor expenditure, and help underpin Council's rate base.

4 Intended outcomes (where we want to get to)

4.1 Vision and objectives

Several documents (CHDC Marketing Plan, Central Queensland Tourism Opportunities Plan, CHRC's Draft Corporate Plan 2009 – 2013) suggest consistent themes and aspirations for tourism in the Central Highlands. Drawing on these and comments from visitors and stakeholders, the following is a tourism vision statement for the region:

> *A cohesive and profitable tourism industry focused on establishing the Central Highlands as a destination of choice by offering quality, distinctive and sustainable experiences in keeping with the community's lifestyle.*

Having proposed a vision, the immediate purpose of the strategic plan is to increase visitation to the region and the value of tourism to the regional economy, by enhancing the appeal of key attractions and places, and identifying new markets and potential investment and infrastructure opportunities.

To achieve an increase in visitation, five objectives will need to be realised, these being:

1. Establishing clear leadership, management and coordination,
2. Further development of existing and new markets and visitor communications,
3. Enhanced industry effectiveness (through alliances and partnerships),
4. Heightened awareness by Council, community and commercial groups of things to see and do in the region and benefits of exploring locally, and
5. Enhanced satisfaction and expenditure through further development of tourism product.

The immediate purpose of the strategic plan is to increase visitation to the region and value of tourism to the regional economy, by enhancing the appeal of key attractions and places, and identifying new markets and potential investment and infrastructure opportunities.

4.2 Potential impact of the Strategic Plan

If the strategic plan is implemented, what impact could it have on visitor numbers, expenditure and the Central Highlands economy?

Two scenarios were prepared (Attachment 7) to illustrate the potential impact of the strategic plan. Assuming the status quo over the next 3 years, where investment in tourism-related products and marketing by the tourism industry, Council and other stakeholders continues more or less as at present, then total visits are projected to increase by 5.7 per cent (an additional 36,980 visits), with growth driven primarily by business and mining-related activity and population growth. This growth is very much reliant on the singular effect of continued growth in mining activity.

Alternatively, if the strategy is actioned, then **total visits are projected to increase by 12.5 per cent** (an additional 80,487 visits) associated with the stimulus of additional investment primarily in the holiday leisure market.

Visitor expenditure would increase to $106.6 million (an 11.1 per cent increase) generating **an additional 86 full time equivalent jobs** and **$7 million in value added** over 2008/09 levels. Apart from the potential for increased visits, the Strategic Plan also benefits the region by diversifying the number of markets and reducing reliance on the region's dominant industry.

The net potential effect over the next three years of implementing the strategic plan rather continuing the status quo is **an additional 43,501 visits** (80,487 less 36,980 visits). Associated with these visits would be an **additional $8.8 million in net visitor expenditure** (over and above expenditure under the status quo). Based on econometric modelling undertaken for this study, the additional visitor expenditure would generate **65 additional full time equivalent jobs** (over and above what might occur without the strategic plan) and an **additional $5.3m in net total value added** (direct and indirect) or gross regional product (over and above value added that may be generated without the strategic plan).

4.3 Implementation

The success of the strategy rests with its implementation, and this in turn depends on identifying a manageable number of affordable opportunities and actions that attract commitment on the part of all stakeholders. Some initiatives will involve CHRC, but are outside Council's control and usual business (and led by others). Some strategies fit closely with Council's plans and programs (and can be led by Council). Both types of initiatives are included with leadership responsibility identified for each strategy.

For those initiatives Council can lead on, there are several ways this can be implemented. The advantages and disadvantages of each are listed briefly. Regardless of which approach is adopted, there are three elements in common – all options require (1) demonstrated commitment by Council, (2) some additional resourcing, and (3) a mechanism for monitoring and accountability for achieving outcomes. The options, not listed in any order of priority or preference, include:

1. **Subcontracting all or most initiatives** to existing constituted organisations, such as Capricorn Tourism, Central Highlands Development Corporation, progress associations and community groups. Advantages: draws on expertise and support of people and organisations well placed to achieve results. Disadvantages: can fragment achievement of an overall plan, requires coordination, a very clear description and understanding of tasks and responsibilities, and accountability for outcomes.
2. **Council delegates initiatives to relevant departments** (or initiatives added to relevant Council programs) within the existing CHRC structure. Advantages: implementation within Council's existing implementation and reporting processes, and degrees of responsibility and accountability for achievement attach to all levels of Council. Disadvantages: may still need to secure external expertise, Council may not be aware of opportunities and threats in the marketplace, risk of being one step removed from the customer (visitors).
3. **Delegate implementation to a tourism officer**. Advantages: single person focused on a specific program, can engage a person with some expertise. Disadvantages: person often doesn't have authority within Council to implement initiatives, no continuity if the person is appointed for a short term (i.e., a 1 year contract), budget may dictate a junior appointment (translating into a position of limited authority and experience).
4. Option 4: **combination of elements** of each of the above.

5 Strategies (how we plan to get there)

Successful implementation of the strategy depends on identifying a manageable number of affordable opportunities and actions that attract commitment on the part of all stakeholders. Following are the proposed strategies and actions to achieve the objectives.

5.1 Establish clear leadership, management and coordination

Strategies	Market	Priority	Led by	Resources
1. Council to adopt this report and implement the strategies within it.		1	CHRC	Council resolution
2. Clarify roles and KPIs with Capricorn Tourism and Central Highlands Development Corporation to ensure focus and coordinated regional tourism marketing and product development.*The current Visitor Information Centre Supervisor could have more of a tactical role in implementing selected strategies within the Central Highlands, with support from Capricorn Tourism head office.		**1**	**CHRC**	**Minimal - Meeting & documentation of roles & KPIs**
3. Review of the Central Highlands tourism marketing plan to ensure existing and new target markets within and outside Central Highlands are being reached with an appropriate budget to achieve same.	All	2	CT	Minimal – Review and confirmation of markets and budget

5.2 Further development of existing and new markets and visitor communications

Strategies	Market	Priority	Led by	Resources
4. There is the opportunity to offer recreational and tourism options to mining camps and communities both within the Central Highlands and northern section of the Bowen Basin (see Attachment 1). E.g., mine workers short-break promotions (relaxing weekends in commercial accommodation in Emerald, activity based campaigns based at the Gemfields, and cultural/recreation campaigns at Capella).*	**Mine workers/ mining camps**[1]	**1**	**CHRC**	**Quarterly campaign & mail-out. Posters. Existing CHRC communication channels.**

[1] In some cases mining camp residents immediately leave for home after their work shift (often outside of the Central Highlands) rather than pursue recreational opportunities within the region. The effectiveness of this campaign should be reviewed at the end of the first year to determine which camps are more amenable, and activities appealing, than others.

Strategies	Market	Priority	Led by	Resources
5. **Enhance the capacity of the region to capitalise on the day trip and VFR markets by creating a local campaign: 3-4 things to see and do each quarter** (Capricorn Tourism to provide copy and images) – extended to the Fitzroy region via the LTO (Capricorn Tourism) through a MOU for a Central Highlands specific campaign (see Attachment 2).*	Visiting friends and relatives	1	CHRC	Quarterly campaign & mail-out / with community notices
6. **Develop and foster new campaigns and markets (i.e., Dig the Tropic Education Program, National Geographic Partnership, backpacker travel to the region).** E.g., include the Gemfields in the education itineraries program being developed for 'Dig the Tropic', advocate for a geo-tourism documentary featuring the Gemfields, Carnarvon and Blackdown Tableland, secure advertorial space in the upcoming edition and future issues of National Geographic that feature the Central Queensland region (see Attachment 3).*	Schools/ education, backpackers/ international touring	1	CT	Per CT plans for these campaigns.
7. **Establish more interactive, informative and user-friendly content for the existing website(s).**	All	1	CT	Part of periodic website update by CT.
8. **Enhance the capacity of the region to capitalise on the VFR/ day trip market by creating a low season campaign of incentives for locals to take their visiting friends and/or relatives to attractions around the Central Highlands.** This would include discounts or free-entry for locals who bring two or more visitors (out of season) to an attraction. The campaign could also feature non-commercial attractions (pools, recreation areas, dams, etc.) in different parts of the region, rotated throughout the year. In summer and the off season, accommodation and food and beverage operators and retailers could offer modest discounts (2 for 1, third night free, etc.) in conjunction with the above campaigns to attract resident daytrip and short break VFR visitation. Link with Capricorn Tourism campaigns to capture broader Central Queensland markets.*	Visiting friends and relatives, residents daytrippers	1	Chambers of Commerce/ Progress Associations	Developed with inputs from CT. Leverage existing CT and CHRC communications channels. Sponsorship by operators/ owners of places featured.
9. **Encourage the backpacker market and international touring - through establishment of basic backpacker-friendly accommodation facilities, new budget and adventure activities as well as incentive deals with Wicked/Apollo/Britz and campaigns with Greyhound (see Attachment 4).***	Backpackers, international touring	1	CT	Part of CT's market development plan.

Strategies	Market	Priority	Led by	Resources
10. Rationalisation/linking of websites (www.centralhighlands.qld.gov.au, www.centralhighlands.com.au, www.capricorntourism.com.au, www.workaway.com.au) to ensure accuracy of data and efficiency in collection and posting of information (assisted by Capricorn Tourism).	All	2	CHRC	CHRC, CHDC & CT webmasters, directed by CHRC & CT
11. With Capricorn Tourism, support Dig the Tropic education program to attract school groups outside of peak season.	Schools/ education,	2	CHRC	Via CT contract & existing CHRC school liaison.
12. Strengthening the brand marketing of the region by supporting and leveraging off Reef to Outback (International Marketing Program).	Backpackers/ international touring	2	CT	Per CT agreement.
13. Sustain awareness of existing distinctive assets and experiences (i.e., Gemfields, Carnarvon National Park).	Primarily caravan and VFR	2	CT	Part of existing CT marketing plan.
14. Grow the point to point drive market (within 400km) regional destinations such as Mackay, Rockhampton, Gladstone, Roma, and growing the Surat-Dawson energy basin - with a particular focus on family holidays. Could include a cooperative TV campaign (with Tourism Queensland assistance) operators could afford to support.	Central Queensland/ Fitzroy region families	2	CT	Included as part of CT marketing plan. Cooperative funding from TQ and operators.
15. Online Calendar of Events (coordinated with CHDC and Capricorn Tourism).	All	2	CHRC	Within existing CHRC/CHDC/CT budgets and programs.
16. Develop a Local Camping and Fishing Guide (including National Parks).	Caravanners, VFR, daytrippers	2	CHRC	CHRC community publications budget. Possible sponsorship by camping/fishing gear retailers.
17. With Education Queensland and Central Highlands schools, develop a school visits and education marketing program.	Schools	2	CHRC	Council community/ schools liaison.
18. With the Department of Environment and Resource Management (Queensland Parks and Wildlife Service) expand and distribute the QPWS Sandstone and Blackdown NP publications.	VFR, caravanners, international tourers	2	CHRC, DERM	Through existing communications channels (& libraries), CT website, VICs.
19. Continue development of the education market with key industry groups and operators in the region (BICC/coal in Blackwater, gems and fossicking in the Gemfields, agriculture in Emerald, etc.).	Schools	2	CT	Part of CT's marketing plan. With support from operators/ venues, & agencies involved.
20. Link DERM's camp site booking site with Capricorn Tourism's website.	All	2	CT	By CT's webmaster.
21. Feature Ag-Grow in the winter campaign.	Caravanners, VFR	2	CT	Part of CT's marketing plan.

Strategies	Market	Priority	Led by	Resources
22. Strengthening the brand marketing of the region by collecting inspiring images and use search engine marketing and optimisation tools to grow visitation to the sites.	All	2	CT	Part of CT's marketing and web plans.
23. With Capricorn Tourism, link the Workaway/ seasonal worker programs to (i) ensure workers are aware of the full range of recreational opportunities throughout the region, and (ii) build links with the backpacker market and Federal Government's working holiday maker program to maximise access to this employment/visitor market.	Backpackers	2	CHDC	Extension of CHDC's existing program.
24. With assistance from Capricorn Tourism, build an interactive website for the Sapphire Gemfields including inspiring imagery from visitors and the image competition that has recently been completed for 'Dig the Tropic'. It would be ideal to build this into an existing website of families, couples, children, etc., enjoying and experiencing the Gemfields.	Central Queensland families, caravanners	2	Chambers of Commerce/ Progress Associations	Managed by Progress Association, with inputs from CT. Grant funding for design and construction. Ongoing updates by Association/ members.
25. Prepare a venues guide of conference, meeting and event facilities (especially significant venues in Capella, Blackwater and Emerald). Post on CHDC and Capricorn Business and Events websites. Conduct mail-out to larger corporates, organisations and mining companies in the region.	Business/ conference	2	CHDC	Managed by CHDC with input from CT, Chambers of Commerce and Progress Associations.

5.3 Enhanced industry effectiveness (through alliances and partnerships)

Strategies	Market	Priority	Led by	Resources
26. With Progress Associations, prepare a tear-off map and services guide for each town.	All	2	CHRC	Existing town service guide budget.
27. Support and leverage the existing structure and resources of the Tourism Advisory Group, Great Inland Way and Capricorn Highway committees, and Capricorn Tourism.	All	2	Operators	Continued engagement with existing initiatives.
28. Continue partnership arrangements with the Great Inland Way to promote the Sapphire Gemfields to long haul drive markets.	Drive	2	Operators	Continued engagement with existing initiatives.
29. Develop and foster relationships with commercial partners. E.g., hire car firms based at Emerald Airport could sponsor installation of copies of interpretive panels for the terminal, likewise major shopping malls could support similar in their centres.	Mine workers, caravanners	2	CT	Guidance from CT, funded by partners.

Strategies	Market	Priority	Led by	Resources
30. Continue to support Capricorn Tourism's and Tourism Queensland's media familiarisations program.	All	2	Operators	Within existing budgets.

5.4 Heightened awareness of tourism, how it works, and its benefits

Strategies	Market	Priority	Led by	Resources
31. With QTIC, offer and promote AussieHost to regional businesses (with assistance from CHDC, Chambers of Commerce and Progress Associations).		2	CT	Cost recovery from participants
32. With Capricorn Tourism, conduct an awareness campaign with local chambers of commerce / progress associations – about the value of tourism, expenditure across many industries, the business of tourism, how to get involved, etc.		2	CHDC	Part of region visits, support from TQ.
33. Prepare and distribute a simple brochure or presentation advocating AAA star rating and caravan park chain and regional tourism organisation membership and resulting benefits to parks.	Caravan	2	CT	By CT, Caravanning Qld, AAA Tourism.
34. Coordinate representatives of community organisations to identify the 10 best and worst things about a nearby town using photography (to help break-down parochial boundaries).		2	CHRC	Existing community program.

5.5 Enhanced satisfaction and expenditure through development of product

Strategies	Market	Priority	Led by	Resources
35. Conduct a facility concept design and feasibility study for a Gemfields visitor, education and community Hub (see Attachment 5).* The Gemfields are unique in Queensland, and one of the most frequently visited and popular destinations within the Central Highlands. It lacks a Gem-based focus and orientation point to first attract then disperse visitors to various experiences around the Gemfields. This would be a catalyst community facility that recognises the uniqueness and significant appeal of the Gemfields and its communities, the popularity of fossicking to both residents and visitors, and opportunity for a multi-purpose facility that meets the needs and interests of both visitor and residents (often similar). This centre is one of two Central Highlands catalyst projects identified in the recently released Central Queensland Tourism Opportunity Plan by Tourism Queensland and State Government.	**All**	**1**	**CHRC**	**Commission concept & feasibility study. Matching funding from CHRC & State. Capital cost by PPP.**

Strategies	Market	Priority	Led by	Resources
36. Accommodation – increasing the range available to the target markets. Develop new caravan parks and camping facilities at locations such as Bedford Weir, near Blackdown National Park, the Gemfields (for peak season overflow) and the Blackwater International Coal Centre, taking into consideration the State Government's Caravan Park Policy on Crown reserves, impact on nearby commercial parks, and opportunity to value add and recover costs by operating more along commercial lines.	Caravanners	2	CHRC	Offer long term lease via expression of interest. Need DERM input if Crown Land.
37. Improve road access to Carnarvon Gorge (focus on the steep and boggy sections first), and for existing Carnarvon-based businesses, facilitate access to services and utilities (i.e. electricity, garbage removal, etc).	All	2	CHRC	Within existing CHRC and DMR capital works programs.
38. Improvements to rest areas (trees, more frequent rubbish collection) and public toilets.	Caravanners	2	CHRC	Incremental increase in budget.
39. Landscaping and welcome 'art works' / signage for each town/village. The public art and elements of the parklands project in Capella are good examples of what can be achieved.	All	2	CHRC	Part of public art budget incl RADF
40. Increase the range of water-based recreational facilities, pools, playgrounds, and gardens within the Gemfields and at Blackwater.	VFR, Central Queensland families	2	CHRC	Incremental increase in budget.
41. Investigate with organisers, the possibility of re-scheduling Gemfest closer to a shoulder period.	All	2	CHRC	Minimal cost.
42. Development of visitor facilities and interpretation at Lonesome National Park, Lake Nuga Nuga and an Arcadia Valley Cultural Trail to encourage visitors to explore the eastern parks off the Carnarvon Highway as an alternative.	All	2	DERM	Existing works program of DERM.
43. Development of pedestrian friendly linkages through towns including footpaths and walkways.	All	2	CHRC	Existing works Council program
44. Enhancing the capacity of the region to capitalise on the day trip market by beautifying the main pedestrian / visitor areas within the Gemfields.	Daytrippers/ visiting friends and relatives	2	CHRC	Identify priorities and integrate with work program and budget.
45. Use an Arts Incubator and competition to encourage local public art.	All	2	CHRC	Within existing program and budget.
46. Linking towns on the Capricorn and Gregory/Carnarvon Highways with a 'Chain of Events' in the off-peak season. These could be Arts themed to showcase art works and hidden gems of local artists (music, visual art, fashion, food, etc.).	All	2	CHRC	Within existing program and budget. Possible support from Queensland Events Regional Development Program.

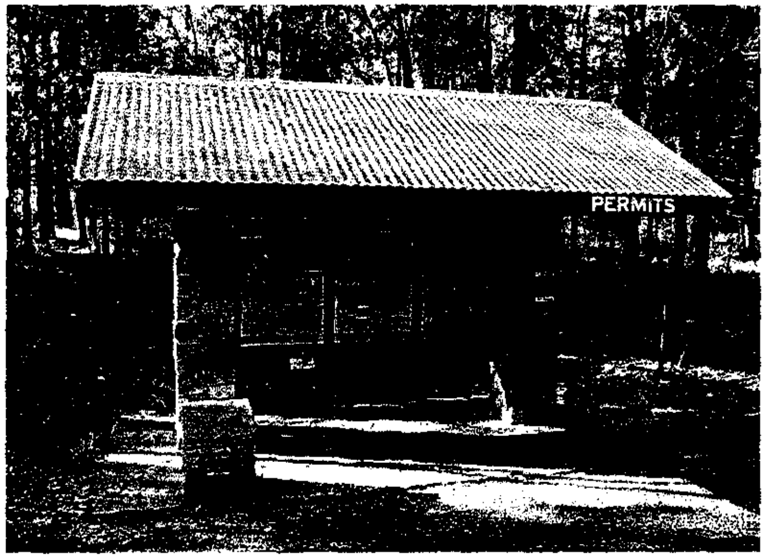
Strategies	Market	Priority	Led by	Resources
47. Increase the range of water-based recreational services and equipment rental (possibly by means of concession operation) at Lake Maraboon.	VFR, daytrippers, Central Queensland families	2	CHRC	Prepare expression of interest document for a local operator.
48. Further development of facilities at Carnarvon and Blackdown Tableland National Parks including walking trails, trail and visitor centre based interpretive material and programs (Carnarvon).	VFR, daytrippers, caravanners	2	DERM	Existing works program of DERM.
49. Upgrade of the 'Nature Trail' and Balloon Cave Heritage Trail at Carnarvon Gorge with interpretation.	Caravanners, backpackers, international touring	2	DERM	Existing works program of DERM.

*** Strategies 2, 4, 5, 6, 7, 8, 9 and 35, represent eight priority opportunities for the Central Highlands.**

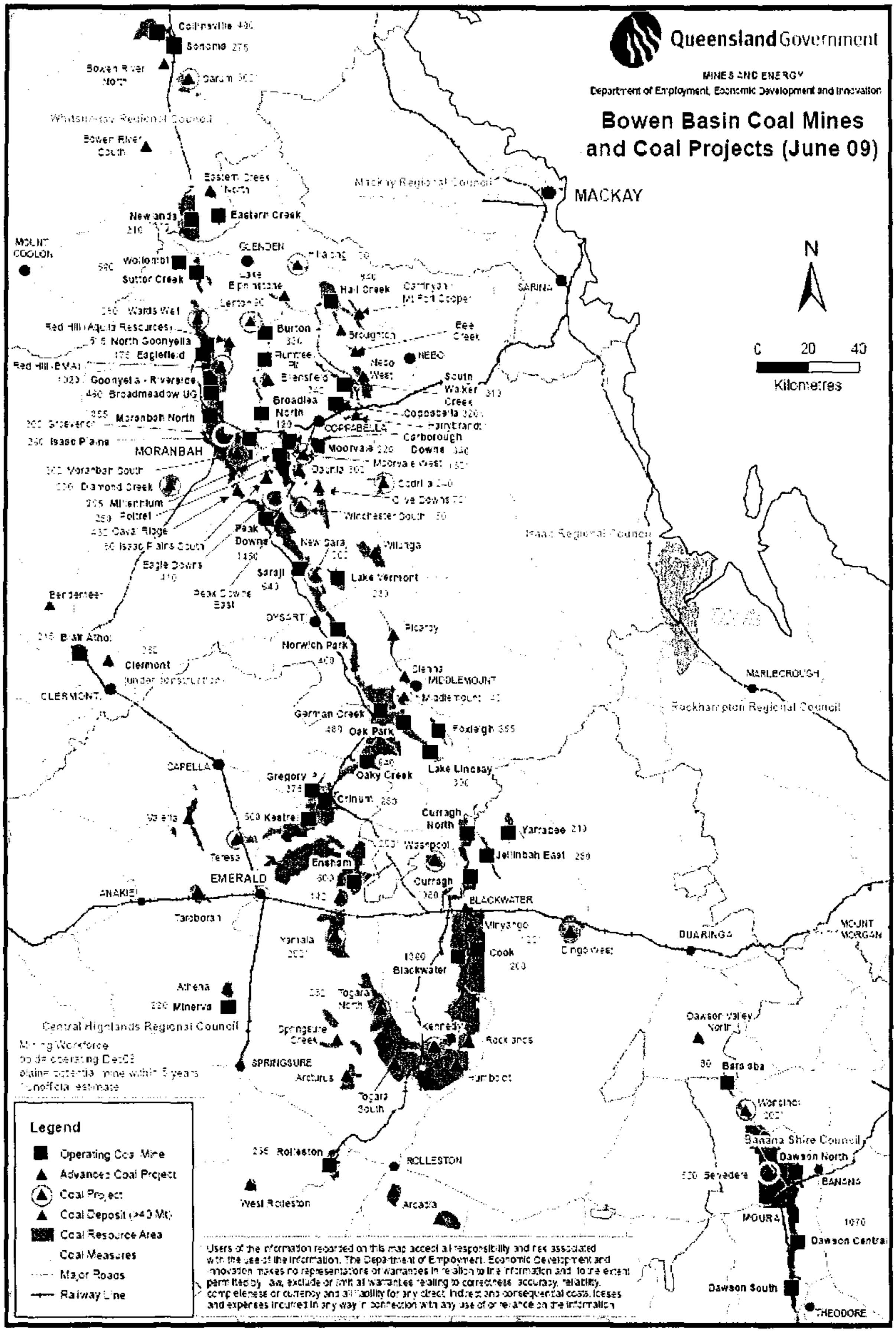
There are a relatively large number of Priority 2 Strategies. These are of similar importance to stimulating tourism growth to the region, however, how readily they can be implemented may be influenced by the priorities and resources of the lead organisation. It is suggested that the lead organisation review the Priority 2 items above and rank these according to when they can best be implemented over the next 2-3 years in conjunction with their own plans and initiatives.

6 Strategies responding to key issues in the project brief

Key issue in the project brief	Strategy reference number
Enhancing the region's reputation for its Sapphire Gemfields	6, 7, 12, 13, 19, 22, 24, 28, 30, 35, 39, 40, 41, 44
Decreasing reliance on existing, dominant markets	3, 4, 5, 6, 8, 9, 11, 12, 14, 16, 17, 19, 22, 23, 29, 30, 31, 35, 40, 44, 46
Enhancing the capacity of the region to capitalise on the day trip market	4, 5, 8, 15, 16, 40, 42, 44, 45, 46
Strengthening the brand marketing of the region	3, 7, 10, 12, 13, 22, 24, 27, 30, 32, 39
Potential investment and infrastructure opportunities	35, 36, 47
Interpretation centres in key locations (see Attachment 6).	35, 42, 48, 49



Attachment 1: Bowen Basin Coal Mines



Attachment 2: Local Campaign

There were 73,151 VFR visitors in the year ending June 2009, spending on average 4 nights in the region and $27.90 per night. They currently spend less than all other accommodation categories other than those who own their own property.

In the year ending June 2009 over 76% of Central Highlands residents hosted a friend or relative at least once, with 65% of these having friends or relatives stay with them more than once. There is an immediate opportunity to encourage visiting friends and relatives to experience the attractions throughout the region by providing incentives to residents to take their visitors to these attractions (i.e., the number of trips, as well as dispersal of trips throughout the region).

The rationale for the local campaign is to create incentives for locals to take their visiting friends and/or relatives to attractions around the Central Highlands. This would include a page or booklet discounts or free-entry for residents who bring two or more visitors (out of season) to an attraction or area. The pass could also feature non-commercial attractions (pools, recreation areas, dams, etc.) in different parts of the region, rotated throughout the year. In summer and the low season, accommodation and food and beverage operators and retailers could offer modest discounts (2 for 1, third night free, etc.) in conjunction with the above campaigns to attract resident daytrip and short break VFR visitation.

Attachment 3: Leveraging Distinctive Marketing Campaigns

Dig the Tropic Education Program

The Sapphire Gemfields are unique in Queensland as the closest and most family friendly of the fossicking areas. They form part of the wider Tropic of Capricorn geo-tourism belt called 'Dig the Tropic' being positioned as an international leader in geo-tourism, with plans deliver 'hands on' experiences for students and school groups at a number of unique locations. 'Dig the Tropic' interpretive signage has been installed throughout the region to provide visitor education and interpretation of some of the key geo-tourism themes, stories and attractions along the Tropic of Capricorn.

The Dig the Tropic project team is currently liaising with a selection of Queensland schools to refine the target, refine the information required and confirm the best contact approach. A School Information Guide will then be developed in conjunction with a monthly "Dig the Tropic Education Experience" bulletin which will be distributed to the database of schools contacts. The bulletin will contain latest news, suggested itinerary and links to suitable education products (i.e. Greyhound, Capricorn Caves etc.) and some small give-aways to encourage readership /response/sign up a colleague.

The Gemfields should capitalise on this by developing **a treasure map for kids** in partnership with a Corporate Sponsor to target schools and kids to attract the families. Possible partners include the Queensland Government Department of Mines and Energy, Mining Companies, and Service Stations.

National Geographic Partnership

Through the ATDP funding, the Dig the Tropic project has secured a partnership with the Australian Geographic group including 3 key media avenues: Australian Geographic magazine, AG Outdoor magazine and the Australian Geographic website. Both magazines and website offer unrivalled penetration into the outdoor market reaching the broadest demographic and largest audience of Australians interested in the outdoors. There is also a high value 'added value' component of the partnership.

The objective of the partnership is to help position Central Queensland as a world leader in geo tourism by promoting awareness and encouraging and motivating people to travel to and experience this region through a highly visible advertising and advertorial magazine and online campaign including a special collector's edition Australian Geographic map insert of central QLD highlighting points of Interest. Australian Geographic and AG Outdoor will both run a 3/4 page advertorial 'destination' promotion on Central Queensland in their July 2010 issues. This will include title page opener and feature numerous points of interest and eye catching photography.

The opportunity exists for Central Highlands operators to leverage off the advertorial pages offered. The Outdoor team will sell the 4 pages immediately following the Central Queensland advertorial promotion to tour operators in the Central Queensland region creating an advertorial regional promotion. The huge level of interest that the editorial feature and advertorial promotion will generate will ensure visitors look towards the tours and services of the participating companies in the advertorial regional promotion to plan their trip and selection of activities. Each advertorial position for operators includes colour photos, information on the participating company including type of activity and contact details. The advertorial will be designed aesthetically so as to appear as though it is part of the feature and appears as editorial. Participating companies have a choice of sizes (full page, half, third and sixth) with ads running in AG Outdoor, Australian Geographic and the website.

Partnerships with National Geographic will also provide exposure to the international market, of whom 40% use travel brochures/magazines as a main source of information about their trip.

Attachment 4: Backpacker and International Touring Market

Central Queensland is ideally located on the East Coast Backpacker circuit to encourage the growth and development of this market segment. From the undeveloped coastline of the Pacific Ocean to the remote hinterland and Central Highlands along the Tropic of Capricorn the region has a range of experiences to meet the market need. Central Queensland is located half way between the popular Whitsundays and Fraser Island and is becoming known for its beaches, laid back lifestyle and as the gateway to the Southern Great Barrier Reef and Islands.

In developing a backpacker market segment, Central Queensland has the advantage of direct access via the Bruce and Capricorn Highways as well as being a key meeting point for many of the inland north-south routes. It has secured additional investment from Greyhound in a number of services (daily services to/from Emerald to Longreach, Mackay and Rockhampton) which demonstrates the growing demand. It is estimated that up to 300 backpackers alight a bus in Rockhampton each day to stretch their legs on a journey north or south. This market is the primary target for this catalyst project. The identified need is for backpacker and budget accommodation facilities, new budget and adventure activities and a consistent approach across the region to the major distribution partners to grow the overnight stay of backpackers in Central Queensland.

The Workaway/ seasonal worker programs in the Emerald area can be linked with the Federal Government's working holiday maker program and backpacker marketing initiatives to leverage access into the backpacker market (research shows employment to be one of the key motivators for destination choice by this market).

Attachment 5: Gemfields visitor, education and community hub

The Gemfields is a unique attraction and destination in Queensland. Research and surveys of residents and visitors for this project found that 45 per cent of all holiday leisure visitors to the Central Highlands region participated in fossicking, and visiting the Gemfields was the third most frequently mentioned feature visitors enjoyed most about their visit to the Central Highlands (after Friendliness of / meeting locals, and Weather / climate).

Whilst the dispersed townships and rustic features of the Gemfields are part of its inherent appeal, visitors surveyed indicated that information and facility improvements are needed in the area.

This strategy study supports the need to determine the specific facilities and feasibility of a facility to provide improved information and interpretation of the Gemfields, which could be delivered in the form of a multi-purpose facility, including an educational centre and outdoor recreational facility, a cafe, meeting spaces and dorm-style accommodation.

Research and consultations for this strategy confirms there is an opportunity for:

- Interpretation of the story of the gems, mining/ fossicking processes, and provide hands on learning experiences such as 'hand-mining' walk through self –guided underground tour (not possible in working mines), etc.,
- Encouraging visitors to visit first hand, fossicking areas and mines, shops, workshops and other places of interest around the Gemfields,
- An adult education facility for jewellery making, gem faceting and other local crafts,
- Group accommodation, and an education and event space, and
- Making the Gemfields more attractive to families (visitors and residents alike) by providing recreation facilities to complement the fossicking experience, including a pool, playground, and kids activities (e.g. mini golf, climbing wall).

While the consultations for this strategy identified the opportunity to develop a Gemfields education and community hub, it is recognised this may not be in accord with some local residents within the area preferring a more isolated and undeveloped Gemfields – it will be incumbent on Council and the Gemfields business community to consult further with the resident community to identify a mutually acceptable concept for the centre.

A stand-alone interpretive centre in the Gemfields that had visitors as its only customer segment and source of revenue is likely to be a marginal proposition commercially. A one-market view limits the opportunity for a centre and its potential viability. These conclusions are supported from experience and from an understanding of the visitor market based on the surveys conducted for this study. A large proportion of visitors to the Gemfields are residents of the region, and visitors staying with Central Highlands residents. Greater visitation by school and higher education groups is also likely to be possible if appropriate facilities were available.

Hence, maximum use and greater prospects for viability are possible if the interpretative centre is designed as a multi-use facility providing tourism, community and recreational benefits. With a business model that incorporates group accommodation (student and bus groups), outdoor education and recreation facilities, and a tourism component, the facility has the potential to provide a more significant return on investment.

Examples of successful mixed use facilities include:

- Chillagoe 'The Hub' (Queensland), is a National Parks booking office, Council library and community centre and interpretative centre.
- Brambuk Cultural Centre (Victoria), an indigenous interpretative centre, education and training facility and information centre in the Grampians.
- Stanthorpe Wine College (Queensland) is a mixed education and training facility, accommodation property and meeting space.

The following extract from the Central Queensland Tourism Opportunity Plan – Catalyst and Priority Projects, 2009, also indicates the need and scope for an interpretive facility.

Just 45 minutes drive from Emerald is the Sapphire Gemfields, the largest sapphire fields in the Southern Hemisphere. The Sapphire Gemfields include the towns of Rubyvale, Anakie, Willows Gemfields and Sapphire. For over a century, fossickers have come to this area hoping to strike it rich. Activities in the Sapphire Gemfields include guided underground mine tours to learn about how sapphires are formed and experience what life is like as a gem prospectors; fossicking parks including sieving and digging for gems; gem faceting demonstrations, gem galleries and jewellers.

The Sapphire Gemfields are one of the core attractions in the Central Highlands region, particularly in the family and tour group market. The opportunity to further enhance the experience of these visitors to the Gemfields by provided educational and learning opportunities has been identified. In particular, this refers to the interpretation of both the history and geological features of the Gemfields for visitors.

Stakeholders have identified the opportunity to develop a nationally significant Gemfields Interpretive Centre and Community Facility as a key visitor attraction in the Gemfields. Outlined below are some of the key opportunities that could be included into the development of a Gemfields Interpretive Centre:

- ***Interpretation of geological features** including education and information on the geological history and features of the area. The interpretation of this information is consistent with the 'Dig the Tropic' concept which aims to promote geo-tourism attractions along the Tropic of Capricorn.*
- ***Interpretation of the history and culture** of the Gemfields. This includes stories of fossickers, significant gem finds and local heroes.*
- ***Interpretation of the fossicking processes** used in the Gemfields including interpretation of the various methods of fossicking and mining for gems as well as an underground mining experience.*
- ***Interactive, hands-on experiences** for visitors to experience the Gemfields. These experiences need to be able to differentiate themselves from the existing fossicking and tour experiences currently existing in the area.*
- ***Community facilities** associated with the Interpretive Centre eg. Cafe, meeting facilities etc.*

A pre-feasibility assessment is needed to progress this project along with a review of various location options. A Project Steering Committee with representatives from State and Local Government, Tourism and the Community should be formed to assess the timeframe and priority of this project regionally. It is understood that an economic assessment of the Central Highlands is planned and this will provide a better understanding of the contribution of tourism to the region. This assessment will help to identify the potential return on investment from such a facility, however the idea is to create both a community facility and a site that works for visitors.

Source: Tourism Queensland, Central Queensland Tourism Opportunity Plan, 2009.

Attachment 6: Interpretation centres in key locations

Visitor Interpretation and Information Centres continue to play a vital role (35% of visitors use them), and is especially high with families. Interpretative centres have been proposed in several locations, including Blackdown Tableland National Park, Carnarvon Gorge National Park and the Sapphire Gemfields. A small proportion of visitors surveyed said (unprompted) that additional information and/or interpretation would make these places more enjoyable for visitors. Previous studies on interpretive centres suggest the benefits associated with additional visitation generated needs to be weighed against capital and ongoing operating costs of such centres. Outlined below is an overview of each location and recommended response to the need for interpretative centres in each of these locations.

Blackdown: Blackdown Tableland National Park already has interpretation points as well as a Dig the Tropic interpretation panel to provide guidance to visitors. An interpretation centre at the National Park would not be feasible due to the travel distance of the Park from the main highway. The existing on-site interpretation is considered to be adequate for visitors. More information on the park could be made available at existing information centres at Emerald and Rockhampton to encourage improved awareness of and visitation to the Park.

Carnarvon: The Department of Environment and Resource Managements has recently invested in upgrades to their existing information centre and offices at the entrance of Carnarvon Gorge. The only recommended improvements to the experience for visitors include better pre-trip information about conditions (road, fuel, accommodation, etc) and activities (walking trails), more detailed maps for walkers, and possibly a toilet facility along the walk.

Gemfields: Over 45% of all visitors to the Central Highlands region participated in fossicking. Fossicking is an important activity for key target groups, including families (72%) and middle-aged groups (44.5%). Information and interpretation at the Gemfields, which attracts 45% of visitors to the region, is essential. The third most frequently mentioned feature visitors enjoyed most about their visit to the Central Highlands was visiting the Gemfields (after Friendliness of / meeting locals, and Weather / climate).

As noted in strategy action #35 and Attachment 5, this strategic plan supports the need for improved information and interpretation of the Gemfields, which could be delivered in the form of a multi-purpose facility, including an educational centre and outdoor recreational facility, a cafe, meeting spaces and dorm-style accommodation.

Attachment 7: Potential impact of expanding tourism

To illustrate the potential impact of adopting the tourism strategy and expanding tourism in the Central Highlands, two scenarios are provided – one assuming the status quo, with tourism product development and marketing continuing as they have been, and a second scenario assuming the various initiatives are implemented. There are many unknown factors that will influence future visitation of the Central Highlands. The two scenarios presented are based on an interpretation of market trends and understanding of operating conditions in the Central Highlands. It is indicative of potential, rather than prediction of likely outcomes.

The projections are made in several steps. First, the potential size of each market the Central Highlands draws on is quantified. Next, potential growth of each market over the next three years is estimated using a variety of data sources[2]. Then, the proportion of each market that the Central Highlands 'captures' is calculated for 2009 primarily from the results of the Central Highlands visitor survey conducted for the project. The capture rates for 2012 are based on an assessment of what the Central Highlands could attract under each scenario. The difference between 2012 visitation under each scenario is the potential impact the strategy could have on the region. Finally, average expenditure per visitor by market is applied to the difference in visitation to estimate additional visitor expenditure in the Central Highlands along with economic impacts that may flow from implementation of the strategic plan.

Key assumptions made for each scenario are as follows.

Status quo

- Product and infrastructure. Product and infrastructure additions/improvements respond primarily to demand by the mining industry and related services. Capital investment in attractions and holiday accommodation is limited to maintenance rather than building new product. Visitor services and interpretation continue as is and are not updated.
- Marketing initiatives. Markets, and campaigns continue as is (including a modest real increase in marketing budget expenditure).
- Regional tourism management. Current arrangement continues as is (Council focus on facilities and services, CHDC on economic development, and Capricorn Tourism on marketing). Capricorn Tourism's Tourism Advisory Group for the Central Highlands and the Great Inland Way committee continue as at present.
- Projections. Visitor numbers at best remain static. Slight decline in average length of stay and holiday visitor nights due to (i) decline in the number of drive/touring holiday travellers compared to point to point and short break holidays nationally, and (ii) visitors still transit through the Central Highlands, but spend less time in the region in favour of adjacent regions with new / more product. Visitor expenditure per night remains about the same in real terms.

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[2] Forecasts from the Federal Government's Tourism Forecasting Committee, Department of Infrastructure and Planning's Planning Information and Forecasting Unit (PIFU), and analysis of trend data from the ABS Survey of Tourist Accommodation, and National and International Visitor Surveys.

Strategy actioned

- Product and infrastructure. Assumes product and infrastructure additions/improvements respond to holiday market needs.
- Marketing initiatives. Markets and campaigns expanded to sustain awareness of existing distinctive assets and experiences, feature new product, with new campaigns and markets developed.
- Regional tourism management. Current arrangements continue but with added clarity on roles and structured monitoring of outcomes.
- Projected visitor numbers, length of stay, and expenditure. With the additional product and marketing initiatives, day trips and VFR visits increase in frequency, the Central Highlands attracts an increased share of the Central Queensland family market, number of international touring visitors increase, as does their and length of stay. Overall, the number of holiday visitors increases by 1 per cent (more than twice the national average increase). Average length of stay in the region is maintained in spite of initiatives introduced by adjacent competitor regions. Modest increase in real visitor expenditure per night occurs in light of product improvements and lifting of value for money recognition by visitors.

Potential impact of expanding tourism (year end June)

	Potential market			Market Capture			Number of Central Highlands visits			Additional visits		
Markets	2009	2012	Ave annual growth	2009	2012 - Status Quo	2012 - Strategy Actioned	2009	2012 - Status Quo	2012 - Strategy Actioned	Status Quo	Strategy Actioned	Difference
Holiday /Leisure												
VFR	29,825[1]	32,352	2.7%	2.17	2.15	2.25	64,842	69,558	72,793	4,716	7,951	3,235
Caravan	883,000[2]	885,652	0.1%	5.9%	5.9%	7.0%	52,530	52,688	61,996	158	9,466	9,308
Hotel/Motel	6,153,000[3]	6,189,992	0.2%	0.5%	0.5%	0.6%	29,362	29,539	37,140	177	7,778	7,601
Campers	1,113,000[4]	1,116,342	0.1%	1.5%	1.5%	1.6%	16,992	17,043	17,861	51	869	818
Business												
VFR	29,825	32,352	2.7%	9.8%	9.8%	9.8%	2,926	3,174	3,174	248	248	0
Caravan	883,000	885,652	0.1%	0.9%	0.9%	0.9%	7,733	7,756	7,971	23	238	215
Hotel/Motel	6,153,000	6,320,631	0.9%	2.3%	2.3%	2.3%	139,788	143,596	143,596	3,808	3,808	0
Other Markets												
Daytrippers	29,825	32,352	2.7%	10.61	10.60	11.00	316,306	342,935	355,876	26,629	39,570	12,941
Mining employees	9,290[5]	12,365	10.0%	5.0%	5.0%	20.0%	465	618	2,473	154	2,008	1,855
CQ families	219,739[6]	235,403	2.3%	4.9%	4.9%	7.5%	10,767	11,535	17,655	768	6,888	6,120
Backpackers	560,000[7]	617,290	3.3%	0.1%	0.1%	0.2%	538	593	1,235	55	696	641
School-daytrip	4,228[8]	4,586	2.7%	50.0%	50.0%	60.0%	2,114	2,293	2,752	179	638	459
School-overnight	28,694[9]	30,739	2.3%	1.0%	1.0%	2.0%	287	307	615	20	328	307
Total							644,649	681,635	725,136	36,986	80,487	43,501

Notes. 1: Central Highlands residents, 2: Visitors staying in Qld caravan parks, 3 Visitors staying in Qld hotels/motels, 4: Visitors in Qld camping or staying in own accommodation, 5: Central Queensland mines employees, 6: Central Queensland population, 7: Visitors in Aus backpacking 8: Central Highlands public school enrolments, 9: Central Queensland public school enrolments.

Note that there is an inherent conservatism in the above projections due to the way projections and growth rates for individual markets are derived that may not match economic events currently talking place in the Central Highlands. In particular, the region's population and labour force may grow at a rate higher than suggested above. The Queensland Department of Infrastructure and Planning's Planning Information and Forecasting Unit (PIFU) forecast the Central Highland's population to increase from 28,256 in 2006 to 32,359 in 2011, an average annual rate of 2.7 per cent (this is the rate used for projecting growth in the VFR, daytripping and local school markets). While PIFU may have taken some mining industry growth into account, it is possible that several recently announced mining projects (such as the Waratah Coal project near Alpha) may generate substantially more potential visitation of the Central Highlands than projected (as a consequence of mining-related employment growth associated with both the construction and operation of new mines).

On the basis of the above assumptions, the Central Highlands stands to gain an additional 80,487 visitors if the strategic plan is implemented, compared to an increase of 36,986 visitors under the status quo – a net potential increase of 43,501 visitors.

In terms of the potential effect of the strategic plan on increasing the value of tourism to the Central Highlands, expenditure per visitor for each of the above markets (using survey and other published and unpublished data) was applied to the above visitor projections. An additional $2.9 million in visitor expenditure over 2009 levels results under the Status Quo scenario, and an additional $11.7 million in visitor expenditure under the Strategy Actioned scenario.

As part of the study, econometric modelling was undertaken to determine the value of tourism to the Central Highlands regional economy (for further detail, see Volume 2 -size, nature and value of tourism to the region). Visitor expenditure data used in modelling the economic impact of tourism to the Central Highlands Region was sourced from the resident and visitor surveys conducted as part of the study and transformed into industry supplier profiles and basic values. These data were then used in an econometric model (incorporating input-output tables for the Central Highlands Region) developed by Applied Economic Research, to produce estimates of value added, wages and salaries and employment associated with tourism activity in the Central Highlands region.

In 2008/09, tourism generated $57.0m in value added and $25.9m in wages and salaries and sustained the full time equivalent employment for 780 people in the Central Highlands region. Based on the projected increase in visitor expenditure in the region, for the status quo scenario, value added would increase by $1.7 million and employment by 21 full time equivalent jobs. If the strategic plan is actioned, potentially, value added would increase by $7.0, and employment by 86 full time equivalent jobs.

The **net impact** of implementing the strategic plan is **an increase of $5.3 million in value added** and **65 full time equivalent jobs** in the Central Highlands. These impacts are summarised in the table below.

Summary of Impacts: 2008/09, Continuing the Status Quo, and Actioning the Strategic Plan

		2012		2012 increase over 2008/09		Net impact
	2008/09	Status Quo	Strategy Actioned	Status Quo	Strategy Actioned	of Strategy
Central Highlands visits*	644,649	681,635	725,136	36,986	80,487	43,501
Visitor expenditure ($m)	$94.9	$97.8	$106.6	$2.9	$11.7	$8.8
Total employment (FTEs)	780	801	866	21	86	65
Total value added ($m)	$57.0	$58.8	$64.0	$1.7	$7.0	$5.3

* overnight visitors plus daytrips

Feasibility study to expand tourism in the Central Highlands Region

Volume 2

Size, nature and value of tourism to the region

EVALUATE COMMUNICATE EVOLVE

Prepared for: Central Highlands Regional Council

Prepared by: Tourism Potential Pty Ltd and EC3 Global

January 2010

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DISCLAIMER

The estimates provided in this report are made on the basis of information available at the time of preparation and terms of reference for the project. The estimates produced and statements made in this report are given in good faith and in the belief that such statements are not false or misleading.

The sources of information and bases of estimates and assumptions are outlined in the report. The nature of available information and the methodologies employed can reduce the reliability of estimates presented. No warranty can therefore be provided to the accuracy of estimates contained in the report.

This report is for the use of Central Highlands Regional Council and no responsibility is accepted to any third party for the whole or any part of its contents. Parties relying in any way on the contents of this report do so at their own risk.

Executive Summary

The Central Highlands Regional Council (with Federal funding through the Department of Infrastructure, Transport, Regional Development and Local Government's Better Regions program) commissioned Tourism Potential and EC3 Global to survey and quantify the size, nature and value of tourism in the Central Highlands region (reported in this document, Volume 2). The project also identifies actions to increase visitation to the Central Highlands, enhance the appeal of key attractions and places (such as the Gemfields, Carnarvon Gorge, Capella, Blackwater, Lake Maraboon, etc), and identify potential business development opportunities (contained separately in Volume 1).

Prior to preparing the Strategic Plan the project team conducted a sample survey of over 260 Central Highland residents, a survey of 70 accommodation operators, and survey of 644 visitors at various locations throughout the Central Highlands over a period of four months to quantify the size of the tourism industry, and nature and characteristics of visitation. In addition, econometric modelling was conducted to determine the value of tourism to the Central Highlands economy. The project team also reviewed published and unpublished data, and consulted tourism operators and industry stakeholders throughout the Central Highlands and elsewhere in Queensland about issues facing the tourism industry and opportunities to stimulate additional, sustainable visitation of the region.

Accommodation

As at 30 June 2009 there were 69 commercial accommodation properties (18 caravan parks and 51 hotels and motels) providing 2,380 rooms, sites and cabins for use by visitors in the region. In year end June 2009 this was used by 227,400 visitors staying a total of 737,050 visitor nights in the region.

In addition, and for year end June 2009, the 29,800 residents and 10,700 households in the Central Highlands region hosted 73,150 visitors staying 289,355 nights during the year. On average residents had visitors staying with them twice in the year.

Other types of accommodation visitors used include National Park camp sites, Council designated (free) overnight camping reserve sites, Showground reserves, improvised houses or tents occupied by short and long term stay visitors, and houses/flats/units (used by visitors only). These places provided 1,062 sites or units and were used by approximately 25,680 visitors staying 101,270 nights in the region.

The average length of stay of guests varies considerably, by accommodation type and area, with visitors in caravan parks staying on average approximately three times as long as visitors in hotels and motels.

Daytrips and Visitors Staying with Friends or Relatives

On average, residents of Central Highlands take 3 to 4 daytrips per month. Half of all daytrips were made to Emerald. The next most visited locations were to the Gemfields, Lake Maraboon/ Fairbairn Dam and Blackwater. For year end 30 June 2009, Central Highlands residents took a total of 316,300 daytrips and spent a total of $18.5 million on daytrips in the region, or an average of $58.50 per daytrip. The largest proportion of this, $5.5 million, was spent on fuel.

On average, Central Highlands households had visitors staying with them (visiting friends or relatives – VFR) twice in the year, with an average group size of 3.5 persons, staying 4 nights. For year end

June 2009, the region hosted 75,150 VFR visitors staying 289,350 nights. They spent $7.8 million or $26.83 per visitor night in the region in year end 30 June 2009. The largest amount, $2.2 million, was spent on pleasure shopping/ gifts/ souvenirs.

The places visited by the largest proportion of VFR visitors were Emerald, Rubyvale, Lake Maraboon, Sapphire, and Blackwater. The most popular activities VFR visitors in the Central Highlands participated in were general sightseeing, eating out, shopping, picnics/BBQs, and fossicking. Specific features or places most VFR visitors enjoyed were the Gemfields/fossicking, Fairbairn Dam/ Dams/ Weirs, local areas/surrounds, Blackdown Tableland National Park, and Blackwater.

Purpose of Visit

Just over half (54%) of all visitors were travelling for the main purpose of a holiday or leisure (175,810 visitors, including VFR visitors staying 750,055 nights). The balance visited for business, mining-related or commercial travel reasons.

Over half (56%) of holiday leisure visitors were from interstate, with almost one third (31%) from New South Wales. Forty-one percent of visitors were from Queensland, and one quarter was from South East Queensland.

Travel Party

One fifth (21%) of holiday leisure visitors were family groups (a travel party with one or more children aged 15 years and under). Only three percent of visitors were Younger Groups (with no children, and where most of the people in the travel party are aged 16 to 25 years). Half of all visitors were Middle-aged Groups (no children, majority of the people in the travel party aged 26 to 65 years). One quarter (26%) of visitors were Older Groups (no children, majority of the people in the travel party aged over 65 years).

Almost half (46%) of all visitors were first time visitors, the balance having visited the region previously.

Direction of Travel

The largest proportion (47%) of visitors to the Central Highlands arrived from towns and cities south of the region. Twenty-six per cent of visitors arrived from towns to the north, 15 per cent of visitors arrived from the east and 12 per cent from the west.

Accommodation Used

The largest proportion (43%) of holiday leisure visitors to the Central Highlands region stayed in a caravan (either at a caravan park, state or national park, or camping reserve). The next most significant form of accommodation used was staying with friends or relatives (41%). A relatively small proportion of visitors stayed in a hotel or motel (15%).

The places that larger proportions of holiday leisure visitors spent one or more nights at were Carnarvon National Park, Emerald, Blackwater area, Lake Maraboon, Sapphire and Rubyvale. A large proportion of visitors overnighted in two or more places in the Central Highlands during their visit.

Satisfaction with Visit and Suggested Improvements

Features that over half of all holiday leisure visitors rated as being very satisfied with included information services, local atmosphere, personal safety/security, and friendliness of locals.

Features that a relatively large proportion of visitors rated as being very dissatisfied with included roads, shopping, value for money, public toilets, and regular driver rest areas. The main features visitors enjoyed most about their visit to the Central Highlands were friendliness of hospitality/service/meeting locals, National Parks/Carnarvon/Blackdown/Minerva Hills, weather/ climate/warmth, visiting the Gemfields/Gemfest, and Lake Maraboon/Red Claw/Fairbairn Dam/ Bedford Weir.

The main features of the visit to the Central Highlands visitors were not happy with included expensive shopping in town/food/coffee/liquor, state of roads/broken edges/dangerous shoulders, and availability/variety of good food/meals.

The improvements suggested by the largest proportion of visitors involve better rest areas, roads, tourist drives and emptying rubbish bins.

Expenditure in the Region

Holiday leisure visitors to the Central Highlands spent a total of $34.3 million (36% of total visitor expenditure) in year end 30 June 2009, or an average of $45.70 per person per night. Approximately $9 million was spent on accommodation, followed by $6 million on fuel, $6 million on groceries, $5 million on shopping and gifts, and $4 million on takeaway food, drinks and meals.
Most of the expenditure ($18 million) was spent by visitors staying in caravans, followed by $8 million by visitors staying in hotels and motels, and $8 million by visitors staying with friends or relatives.

While business travellers account for one third of visitor nights, they spend almost two and one half times ($111.48) as much per visitor night as holiday leisure travellers ($45.75), and account for 44.5 per cent of total visitor expenditure in the Central Highlands region. While business travellers spend more per night on travel related items (accommodation, food, car hire, etc.) they spend considerably less on recreational items such as fishing and fossicking gear and supplies, tours, entrance fees, etc.

Value of Tourism to the Region

In 2008/09, tourism generated $57.0 million in value added ($30.1m directly and $26.9m indirectly) in the Central Highlands regional economy and employment for the full time equivalent of 780 people (517 directly and 263 indirectly) in the region.

In the Central Highlands, the initial tourism value added ($30.1m) and employment (517 FTE's) represent 0.9 per cent and 3.1 per cent respectively of gross regional product and employment in the Central Highlands region. These proportions are lower than those at a national level (direct tourism expenditure accounted for 3.6 per cent of GDP and 4.7 per cent of employment in Australia in 2007/08). However, if the standout mining industry is excluded from the contribution to regional value added and employment, tourism's contribution is more in line with the national average (2.6% and 4.1% respectively).

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1 INTRODUCTION

Central Highlands Development Corporation and Central Highlands Regional Council commissioned Tourism Potential in association with EC3 Global to prepare a feasibility study and develop a strategic plan to determine Central Highland's potential to expand current visitation rates.

The foundation for the strategic plan was a benchmarking stage to collect essential data on the level of tourism (number of visitors) and visitation characteristics (where visitors stay, what they do, how much they spend, etc.) to determine the current nature and value of tourism in the region. This Volume 2 of the project report summarises the results of the first part of the project – estimates of the number of visitors to the region, characteristics of visitation, and value of tourism.

Prior to preparing the Strategic Plan the project team conducted a sample survey of over 260 Central Highland residents, a survey of 70 accommodation operators, and survey of 644 visitors at various locations throughout the Central Highlands over a period of four months to quantify the size of the tourism industry, and nature and characteristics of visitation.

The methodology used in the various surveys is described in Section 5: Study Methodology.

Results from the first stage survey to quantify the size of tourism in the Central Highlands are provided in Section 2, and results from subsequent surveys profiling the nature of tourism activity in the region in Section 3.

Econometric modelling using the visitor expenditure data was conducted to determine the value of tourism to the Central Highlands economy. The results of this modelling are provided in Section 4.

2 SIZE OF TOURISM IN THE CENTRAL HIGHLANDS

Results for the visitor number benchmarking study are provided for the region, and grouped by the four statistical local areas (SLAs) comprising the region (which are the same as the former local government areas). In the case of the Emerald SLA, this is broken down into the Gemfields (comprising Rubyvale, Sapphire, Anakie and Willows) and balance of Emerald. Areas used in the report are classified as follows:

Table 1 Cross reference of reporting areas and SLAs

Statistical Local Area	Report Region
Bauhinia	South
Duaringa	East
Emerald (excluding the Gemfields)	Central
Emerald (Gemfields only)	Gemfields
Peak Downs	North
Four SLAs combined	Central Highlands

All data presented is for year end 30 June 2009.

2.1 COMMERCIAL ACCOMMODATION

In total, there are 69 hotels, motels, apartments, guest houses and caravan parks in the region providing a total of 2,380 rooms, sites, cabins and apartments[1]. Just over half (53%) of the region's accommodation stock is located in the Central area, followed by the Gemfields (14%).

Table 2 Accommodation stock by area

Accommodation stock	Central	East	Gemfields	North	South	Central Highlands
Properties	27	15	11	6	10	69
Rooms/sites	1,258	318	336	204	264	2,380
% of regional rooms/sites	53%	13%	14%	9%	11%	100%

Most (58%) accommodation in the region is included in the ABS Survey of Tourist Accommodation (STA), which means the data published by them provides a reasonable indicator of accommodation performance and trends in guest numbers and nights (Table 3).

Table 3 Quantity of accommodation included and not included in the STA

Room/site stock	Central	East	Gemfields	North	South	Central Highlands
Included in the STA	930	176	214	62	-	1,382
Not included in the STA	328	142	122	142	264	998
Total	1,258	318	336	204	264	2,380
% of rooms included in the STA	74%	55%	64%	30%	0%	58%

1 While not all operators participated in the survey, almost half (49%) did – or 66 per cent if response rate is measured by number of rooms/sites. Therefore the survey results are a reasonable representation of the size and nature of commercial accommodation performance in the region.

However, the ABS will not release data by property or area within the Central Highlands, which is one reason why a comprehensive benchmarking survey or accommodation operators was undertaken as part of the project.

While it is not possible to determine precisely which establishments are included in the ABS survey, the project team believe that at least two thirds of establishments responding to the project survey are included in the ABS Survey of Tourist Accommodation (Table 4).

Table 4 Accommodation survey response rate

	By Establishment			By Room/site nights occupied		
	Included in STA	Central Highlands Survey	Response Rate	Included in STA	Central Highlands Survey	Response Rate
Hotel/motel rooms	21	14	66.7%	160,004	118,548	74.1%
Caravan park sites	8	6	75.0%	142,301	123,530	86.8%

For operators that did not participate in the survey, results were weighted so that when added the sum of responses from participating operators, the data added to the ABS Survey of Tourist Accommodation data. Where data from the ABS was not available (such as the proportion of nights by purpose), data from a similar sized property in a similar location was used for non respondents.

Table 5 Number of establishments by area

Establishments	Central	East	Gem-fields	North	South	Central Highlands	% by type
Caravan parks	4	4	6	1	3	18	26.1%
Hotels, motels, guest houses	23	11	5	5	7	51	73.9%
Total properties	27	15	11	6	10	69	100.0%
% by area	39.1%	21.7%	15.9%	8.7%	14.5%	100.0%	

Most (56%) of the supply of commercial accommodation rooms and sites in the region are hotel, motel and guest house rooms (1,322) with the balance (44%) being caravan park sites and cabins (1,058). However, distribution of these types of accommodation within the region varies, with most hotel/motel stock located in the Central area, and a large proportion of caravan park accommodation located in the Gemfields (Figure 1).

Figure 1 Distribution of commercial accommodation by area

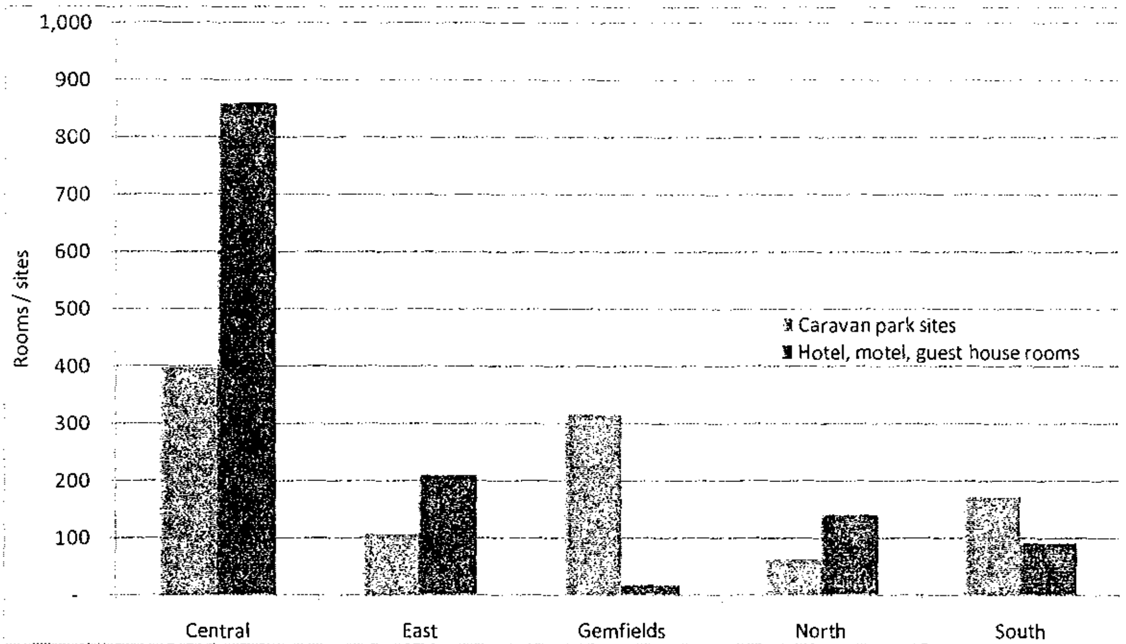


Table 6 below shows that over half (67%) of all hotel, motel and guest house room nights occupied for year end June 2009 were in the Central area, followed by 19 per cent in the East area. The largest proportion (49%) of caravan park site and cabin nights occupied in the region were in the Central and North areas, followed by the Gemfields (24%), South (14%) and East (13%) areas (Table 6).

Table 6 Room and site nights occupied, Central Highlands, year end June 2009

Room/site nights	Central	East	Gemfields	North	South	Central Highlands
Caravan park site nights	96,427	25,757	47,563	n.a.	27,164	196,912
% of regional nights	49%	13%	24%	n.a.	14%	100%
Hotel/motel room nights	188,940	53,484	4,405	17,943	18,790	283,563
% of regional nights	67%	19%	2%	6%	7%	100%

Note: There is one caravan park in the North area. For the purpose of confidentiality, the results of this one property are included with caravan park data for the Central Area rather than the North area.

For the region as a whole, there is little seasonal variation in hotel/motel room nights occupied, with demand distributed evenly each quarter (Figure 2). With caravan parks, site and cabin nights occupied vary by quarter, with the March quarter being the quietest quarter (18% of annual nights), and September quarter being the busiest (32% of annual nights).

Seasonal demand varies least in the Central and East areas, and most in the Gemfields and South areas. With the latter areas, 14 per cent of annual room and site night demand occurs in the March quarter, increasing to 36 per cent in the September quarter (Figure 3).

Figure 2 Room and site nights occupied by quarter, year end June 2009

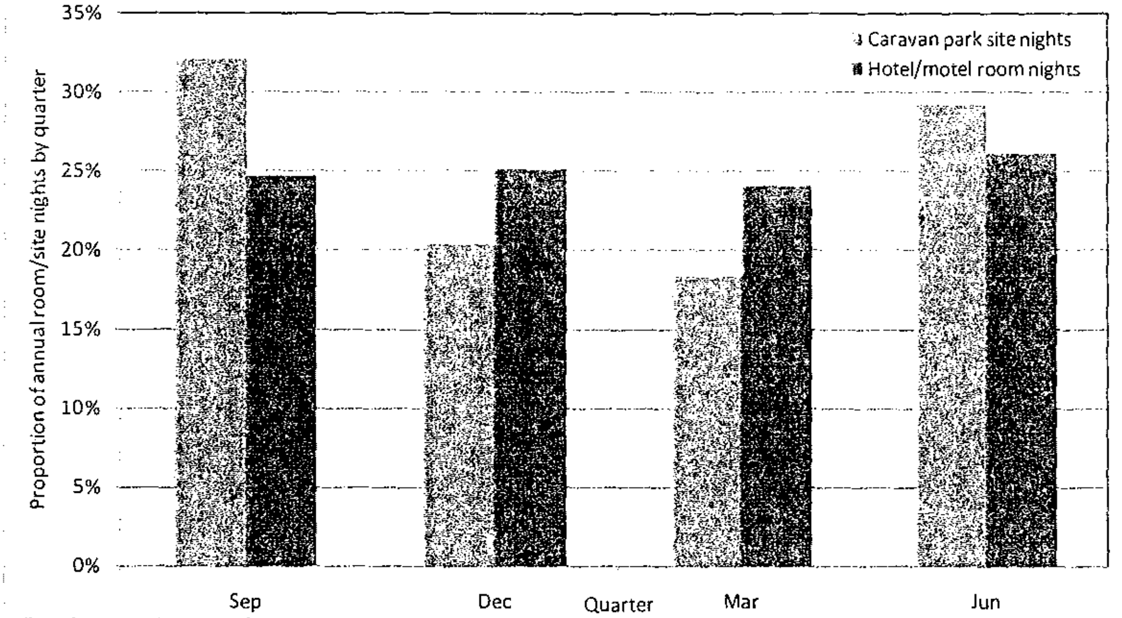
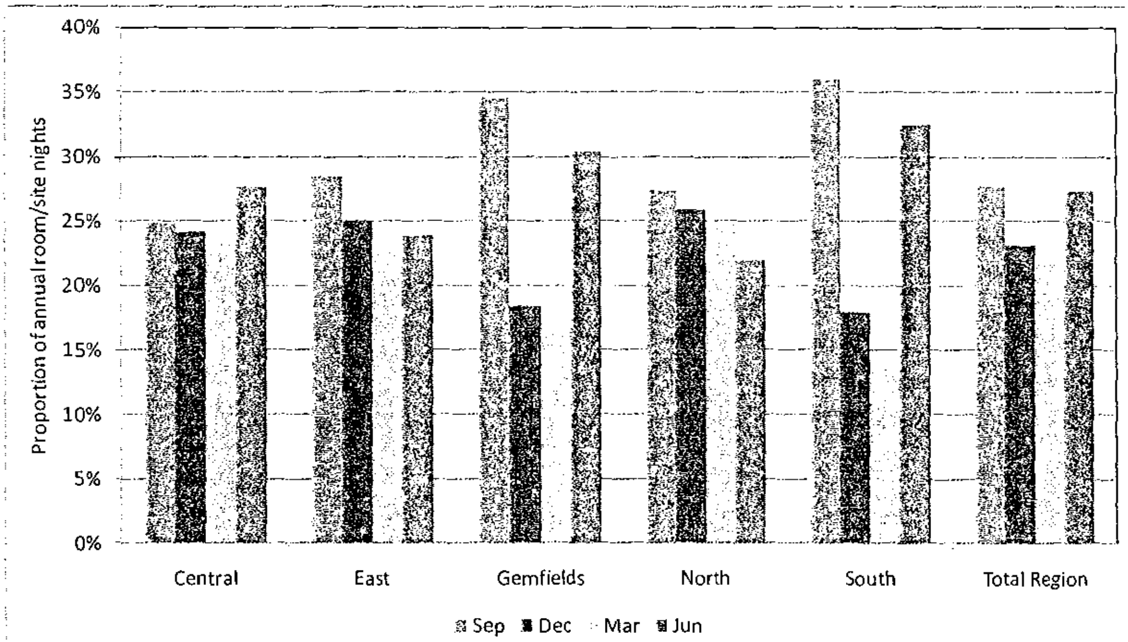


Figure 3 Room and site nights occupied by area, year end June 2009



In year end June 2009 there were 227,399 guests or visitors staying in hotels, motels, guest houses and caravan parks in the Central Highlands staying an average of 3.2 nights. The average length of stay was greatest in the Gemfields and North areas (Table 7).

Table 7 Guests and guest nights by area

	Central	East	Gemfields	North	South	Central Highlands
Guests	132,343	34,643	14,175	8,224	38,014	227,399
Guest nights	418,223	103,060	92,693	45,474	77,601	737,052
Average length of stay	3.2	3.0	6.5	5.5	2.0	3.2

The average length of stay of guests varies considerably, by accommodation type and area, with visitors in caravan parks staying on average three times as long as visitors in hotels and motels. Visitors staying in caravan parks stayed an average of almost two weeks in the North area, while visits in the South area were relatively short (Table 8).

Table 8 Average length of stay by accommodation type

Average length of stay	Central	East	Gemfields	North	South	Central Highlands
Caravan parks	9.4	7.0	7.7	13.4	2.0	6.0
Hotels, motels, guest houses	2.0	2.2	2.0	3.1	2.1	2.1

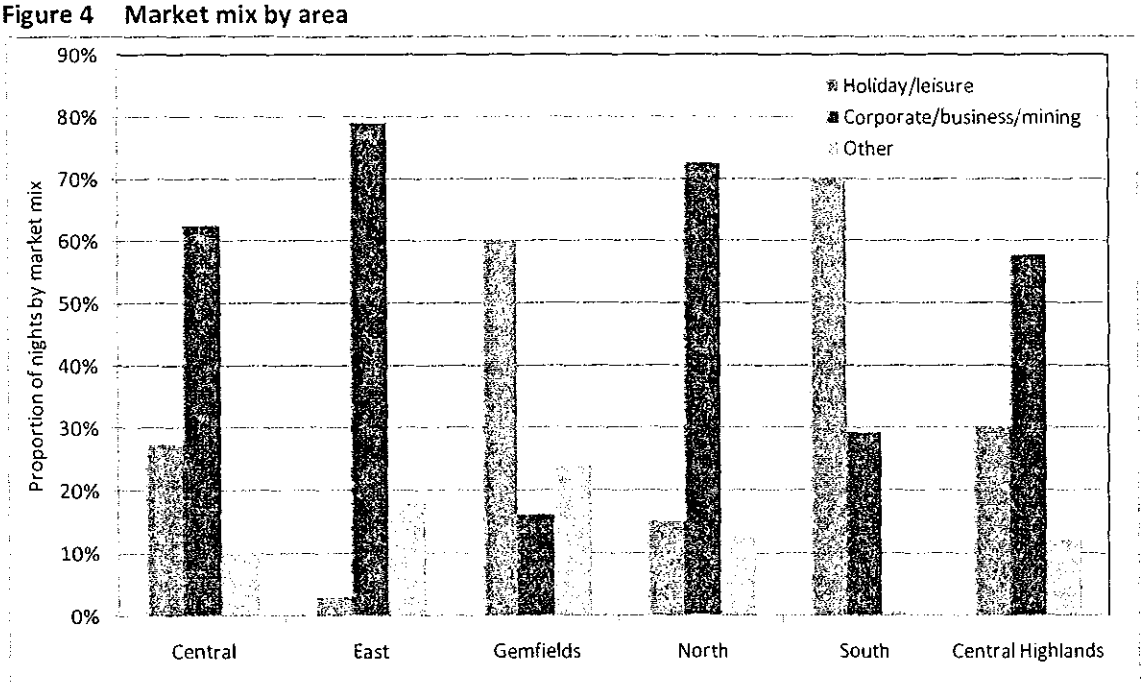
Accommodation takings of hotels, motels, guest houses and caravan parks in the Central Highlands totalled approximately $30.3 million for year end June 2009. Operators in the Central area accounted for 63 per cent of accommodation takings (Table 9). Caravan parks accounted for 16 per cent ($4.8m) and hotels and motels 84 per cent ($25.5m) of total accommodation takings.

Table 9 Accommodation takings by area

	Central	East	Gemfields	North	South	Central Highlands
Takings ($M)	$19.1	$6.3	$1.4	$1.8	$1.8	$30.3

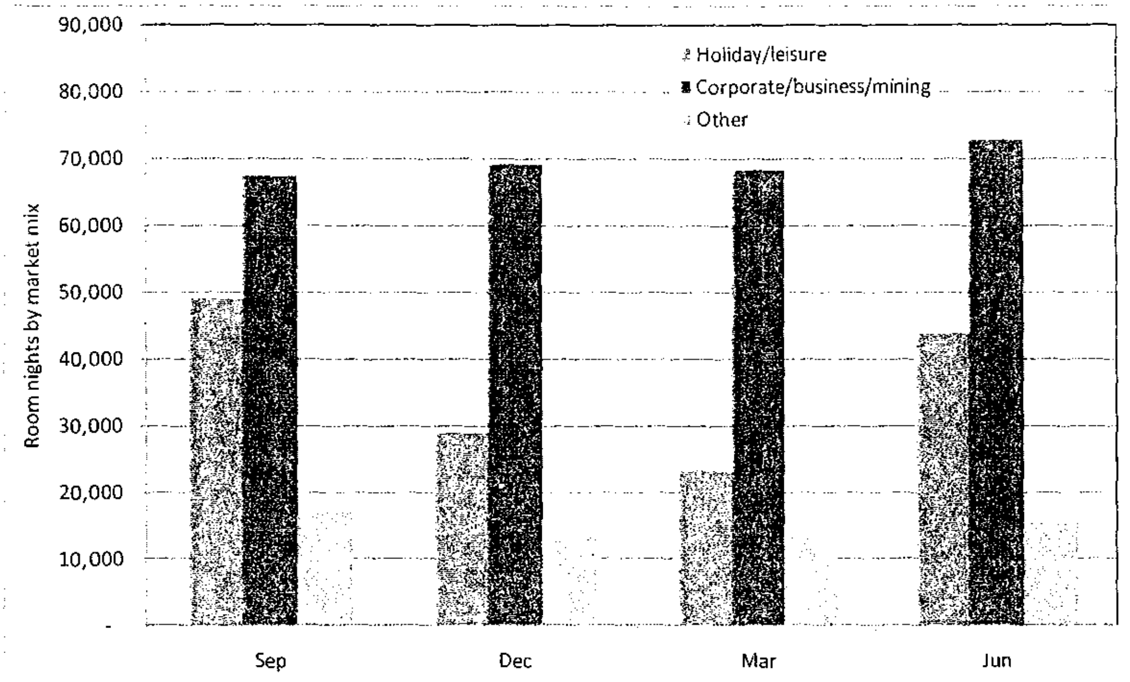
In terms of market mix of room and site nights occupied for the region as a whole, most (58%) were for the purpose of corporate/ business/ mining, followed by 30 per cent for holiday/ leisure, and 12 per cent for other purposes. The mix varies considerably within the region, with the corporate/ business/ mining predominating in the Central, North and East areas, and holiday/ leisure predominating in the Gemfields and South area (Figure 4).

Figure 4 Market mix by area



The corporate/ business/ mining market showed little seasonal variation, while holiday/ leisure visitation was strongest in the September and June quarters (Figure 5).

Figure 5 Market mix by quarter



2.2 VISITORS STAYING WITH FRIEND AND RELATIVES, AND DAY TRIPPERS

In addition to the 227,399 visitors staying in hotels, motels, guest houses and caravan parks in the Central Highlands are 73,151 visitors staying with friends or relatives in the region. These visitors stayed an average of 4.0 nights, or 289,355 nights in total in the region.

Table 10 Visitors staying with friends and relatives, by area, year end June 2009

Area	Visitors	Nights	Average length of stay	Ave visitor nights per household
Central	33,826	139,446	4.1	25.7
East	17,711	81,256	4.6	32.0
Gemfields	3,946	16,266	4.1	25.7
North	8,862	27,465	3.1	23.8
South	8,807	24,922	2.8	26.0
Central Highlands	**73,151**	**289,355**	**4.0**	**27.0**

Daytrips within the Central Highlands by residents don't fall within the general definition of a visitor, however, daytrippers do visit places and engage in leisure activities similar to those of visitors. For example, the attendance at places (such as the Gemfields, or Blackwater International Coal Centre) or visits to and campers using National Parks include daytrips by residents.

Hence from a tourism product marketing and development perspective, daytrips[2] are often included in estimates of visitor numbers to a region. In the Central Highlands, there were approximately 316,300 daytrips in the region undertaken by its residents.

Table 11 Daytrips by residents in the Central Highlands, by area, year end June 2009

Area	Daytrips	Ave daytrips per household
Central	152,287	28.1
East	55,999	22.1
Gemfields	17,763	28.1
North	58,920	51.1
South	31,336	32.7
Central Highlands	316,306	29.5

2.3 OVERALL VISITATION LEVELS FOR THE CENTRAL HIGHLANDS REGION

Combining the groups of visitors to the Central Highlands using various forms of accommodation results in approximately 326,000 visitors, 1.13 million visitor nights and 316,000 resident daytrips in the Central Highlands region in year end June 2009.

Table 12 Visitor nights by area and accommodation type

Accommodation type	Central	East	Gemfields	North	South	Central Highlands	% of nights by type
Hotel, motel, guest house rooms	222,792	64,203	5,732	19,492	24,587	336,806	29.9%
Caravan park sites	195,431	38,858	86,961	25,982	53,014	400,246	35.5%
National Park camp sites	-	4,581	-	-	5,608	10,189	0.9%
Showground camp sites	1,776	-	-	-	-	1,776	0.2%
Overnight camping reserve sites	10,657	-	7,105	-	-	17,762	1.6%
House/flat/units	11,133	12,063	3,139	1,862	2,920	31,116	2.8%
Improvised house/tent-visitors	3,194	1,460	10,950	1,095	12,410	29,109	2.6%
Improvised house/tent-residents	1,533	365	8,103	876	438	11,315	1.0%
Visiting friends and relatives	139,446	81,256	16,266	27,465	24,922	289,355	25.7%
Total Visitor Nights	585,962	202,786	138,256	76,771	123,899	1,127,674	100.0%
% of nights by area	52.0%	18.0%	12.3%	6.8%	11.0%	100.0%	

Over half (52%) of all visitor nights were in the Central area. The largest proportion of visitor nights by accommodation used were in caravan parks (36%), followed by hotels/motels (30%), and with friends or relatives (26%).

[2] Daytrippers are residents of the region who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel.

Table 13 Visitors by area and accommodation type

Accommodation type	Central	East	Gemfields	North	South	Central Highlands	% by type
Hotel, motel, guest house rooms	111,467	29,130	2,826	6,284	11,507	161,215	49.4%
Caravan park sites	20,876	5,513	11,348	1,940	26,507	66,184	20.3%
National Park camp sites	-	1,826	-	-	834	2,661	0.8%
Showground camp sites	888	-	-	-	-	888	0.3%
Overnight camping reserve sites	5,329	-	3,552	-	-	8,881	2.7%
House/flat/units	3,108	3,368	876	520	815	8,686	2.7%
Improvised house/tent-visitors	456	209	1,564	156	1,773	4,158	1.3%
Improvised house/tent-residents	55	13	289	31	16	404	0.1%
Visiting friends and relatives	33,826	17,711	3,946	8,862	8,807	73,151	22.4%
Total Visitors	176,004	57,770	24,402	17,793	50,260	326,229	100.0%
% of visitors by area	54%	18%	7%	5%	15%	100%	
Daytrips	152,287	55,999	17,763	58,920	31,336	316,306	
% of daytrips by area	48.1%	17.7%	5.6%	18.6%	9.9%	100.0%	

Note: the total number of visitors may be overstated slightly, as some visitors may have used more than one form of accommodation during their stay in the Central Highlands.

The average length of stay is shorter for hotels/motels, with visitors in this form of accommodation accounting for 49 per cent of total visitors, but only 30 per cent of visitor nights. The inverse applies to visitors staying with friends/relatives and at caravan parks, which account for 27 per cent of nights and 22 per cent of visitors to the region. Visitors staying in caravan parks and friends and relatives tend to stay for longer than visitors staying in hotels/motels.

Compared with the resident population, there is a smaller proportion of visitor nights in the Central, East and North areas, and greater proportion of visitor nights in the Gemfields and South areas (Table 14).

Table 14 Distribution of visitor nights and resident population by area

	Visitor nights	Residents
Central	52.0%	53.7%
East	18.0%	22.7%
Gemfields	12.3%	4.1%
North	6.8%	11.7%
South	11.0%	7.8%
Central Highlands	100.0%	100.0%

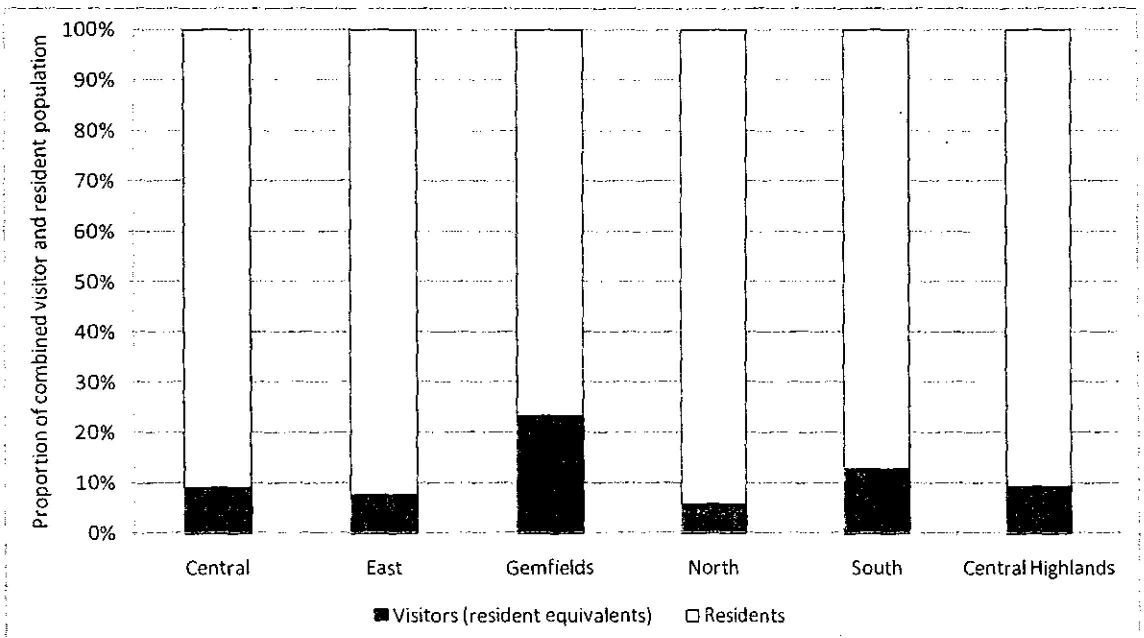
A useful benchmark to consider is the number of visitors to a region as resident equivalents. This is calculated by dividing the number of visitor nights by days in the year. In broad terms, it represents the average number of overnight visitors in the region on any one day. For the Central Highlands region, on average there were 3,090 visitors in resident equivalents for year end June 2009. This means that on any one night, 9.4 per cent of people staying or living in the region (visitors plus residents) were visitors.

Table 15 Visitors in resident equivalents, by area

	Visitors (resident equivalents)	Residents
Central	1,605	16,022
East	556	6,771
Gemfields	379	1,233
North	210	3,484
South	339	2,314
Central Highlands	3,090	29,825

This proportion is most significant for the Gemfields and South areas (Figure 6). If the seasonal distribution of visitor nights is examined, then the proportion of visitors to residents in the busiest quarter increases to 11 per cent for the Central area, 9 per cent for the East area, 38 per cent for the Gemfields, 6 per cent for the North area and 20 per cent for the South area. During the peak winter season, over one third (38%) the people staying or living in the Gemfields area are visitors.

Figure 6 Distribution of visitor and resident population by area



Almost 60 per cent of all guest nights in hotels, motels and caravan parks were by corporate/ business/ mining travellers (see Figure 4 on page 6). When visitors staying with friends or relatives and other forms of accommodation are included, the majority (53.9%) of total visitor nights to the Central Highlands are for holiday/leisure purposes, followed by 33.5 per cent for corporate, business, or mining purposes (Figure 7 and Table 16).

The significance of the holiday/leisure market is clear in the Central, Gemfields and South areas, while the corporate/business/mining market is prominent in the North and East areas.

Figure 7 Area by visitor night market mix

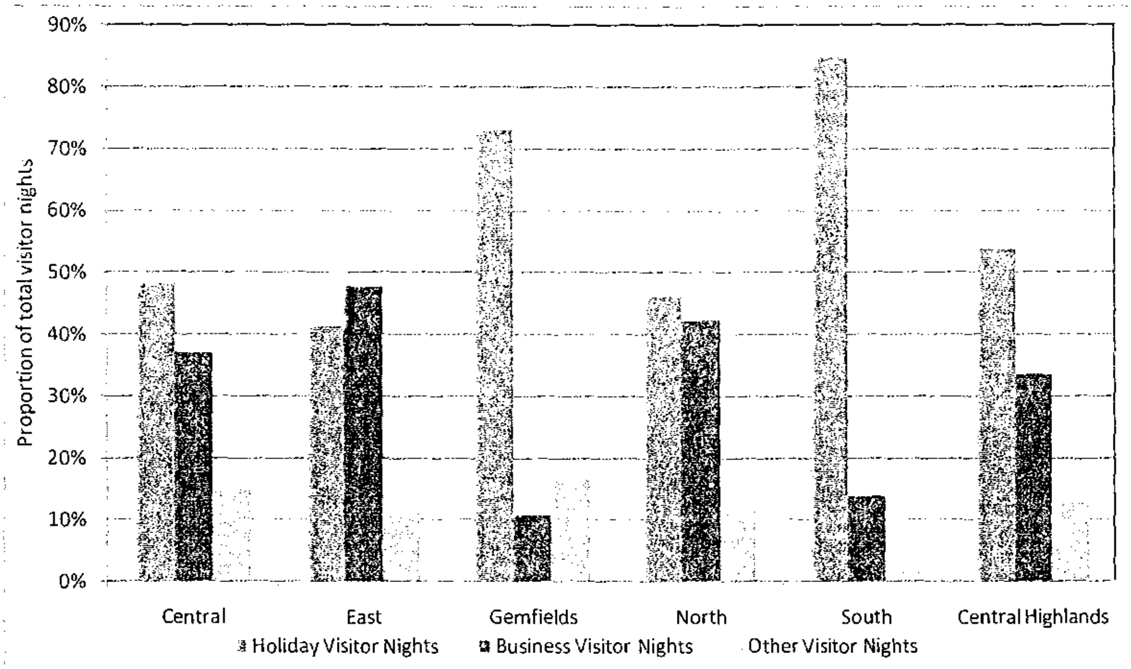


Table 16 Visitor nights by purpose, area and accommodation type

	Central	East	Gemfields	North	South	Central Highlands
Holiday/leisure						
Hotel, motel, guest house rooms	22,019	2,320	3,041	1,549	9,418	38,347
Caravan park sites	113,904	582	54,973	6,660	52,326	228,445
National Park camp sites	-	4,581	-	-	5,608	10,189
Showground camp sites	1,776	-	-	-	-	1,776
Overnight camping reserve sites	10,657	-	7,105	-	-	17,762
House/flat/units	3,041	356	1,880	278	2,049	7,605
Improvised house/tent-visitors	3,194	1,460	10,950	1,095	12,410	29,109
Improvised house/tent-residents	1,533	365	8,103	876	438	11,315
Visiting friends and relatives	126,896	73,943	14,802	24,993	22,679	263,313
Total Holiday Visitor Nights	283,021	83,606	100,854	35,452	104,929	607,861
Holiday/leisure daytrips	108,228	40,257	12,624	25,568	18,173	204,850
Corporate/business/mining						
Hotel, motel, guest house rooms	194,212	49,132	2,692	17,943	15,169	279,147
Caravan park sites	9,899	34,661	10,919	12,031	197	67,707
National Park camp sites	-	-	-	-	-	-
Showground camp sites	-	-	-	-	-	-
Overnight camping reserve sites	-	-	-	-	-	-
House/flat/units	6,955	9,528	509	1,351	855	19,198
Improvised house/tent-visitors	-	-	-	-	-	-
Improvised house/tent-residents	-	-	-	-	-	-
Visiting friends and relatives	5,578	3,250	651	1,099	997	11,574
Total Business Visitor Nights	216,644	96,571	14,770	32,423	17,218	377,626
Corporate/business daytrips	20,985	7,484	2,448	2,185	4,579	37,681

	Central	East	Gemfields	North	South	Central Highlands
Other						
Hotel, motel, guest house rooms	6,561	12,751	-	-	-	19,312
Caravan park sites	71,628	3,615	21,069	7,291	491	104,094
National Park camp sites	-	-	-	-	-	-
Showground camp sites	-	-	-	-	-	-
Overnight camping reserve sites	-	-	-	-	-	-
House/flat/units	1,136	2,180	750	232	16	4,313
Improvised house/tent-visitors	-	-	-	-	-	-
Improvised house/tent-residents	-	-	-	-	-	-
Visiting friends and relatives	6,972	4,063	813	1,373	1,246	14,468
Total Other Visitor Nights	86,297	22,609	22,632	8,896	1,752	142,186
Other daytrips	23,074	8,258	2,692	31,167	8,584	73,775

3 CENTRAL HIGHLANDS VISITOR PROFILE

3.1 PROFILE OF DAYTRIPS BY CENTRAL HIGHLANDS RESIDENTS

In year end 30 June 2009, Central Highlands' residents took 316,306 day trips in the region. Daytrippers are residents of the region who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel.

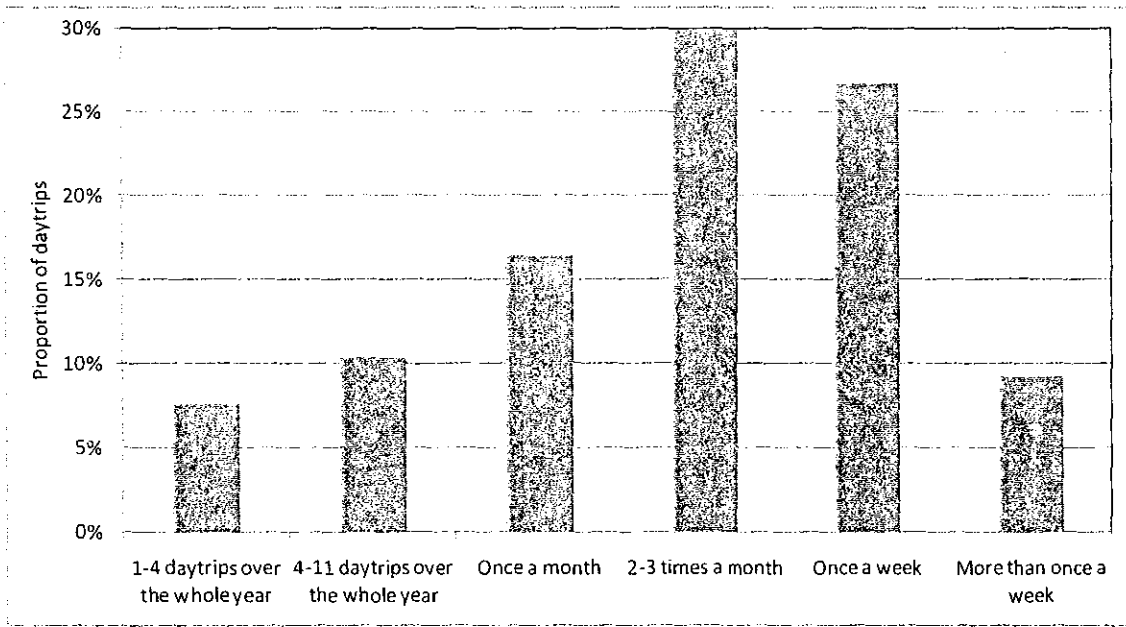
Daytrips within the Central Highlands by residents don't fall within the general definition of a visitor, however, daytrippers do visit places and engage in leisure activities similar to those of visitors. Therefore, from a tourism product marketing and development perspective, daytrips are often included in estimates of visitor numbers to a region.

Approximately 64 per cent of the residents of Central Highlands households took one or more daytrips during the year (36% did not take a daytrip).

Over half (53.8%) of daytrips in the region were made to the Central area, followed by the North area (18.6%), East area (17.7%) and South area (9.9%).

On average, residents of Central Highlands take 3 to 4 daytrips per month. Over one quarter (29.9%) of residents take daytrips 2-3 times per months (Figure 8), followed by once per week (26.7%) and once per month (16.4%).

Figure 8 Frequency of daytrips by residents



When asked whether they took more or less daytrips in summer or winter, 12.4 per cent of residents said more in summer, 15.7 per cent more in winter, and 71.9 per cent said about the same number of day trips in summer and winter.

Half of all daytrips by residents were made to Emerald. The next most visited location was Lake Maraboon/ Fairbairn Dam (7.2%) and Blackwater (6.4%). Approximately 8.5 per cent of daytrips were to the Gemfields area in total (Table 17).

Table 17 Daytrip destinations

Location	Daytrips	% of total
Emerald	157,814	49.9%
Lake Maraboon	22,866	7.2%
Blackwater	20,324	6.4%
Springsure	17,431	5.5%
Blackdown Tableland National Park	12,296	3.9%
Rubyvale	9,997	3.2%
Capella	9,780	3.1%
Gemfields area generally	8,582	2.7%
Sapphire	8,402	2.7%
Tieri	7,434	2.4%
Duaringa	6,884	2.2%
Claremont	3,861	1.2%
Moura	2,332	0.7%
Theresa Creek Dam	850	0.3%
Rolleston	567	0.2%
Carnarvon National Park	451	0.1%
Don't know	1,112	0.4%
Other	25,326	8.0%
Total	316,306	100.0%

The daytrip purpose mentioned by the largest proportion (24.1%) of residents was shopping, followed by leisure/relaxation (15.8%), business (9.7%) and sport – spectating (9.2%). Results from the survey indicate that Central Highlands residents undertake daytrips for a wide range of purposes (Table 18).

Table 18 Daytrips by purpose

Main purpose	% of daytrips
Shopping	24.1%
Holidays / leisure / relaxation / getting away	15.8%
Business	9.7%
Sport - spectating	9.2%
Health-related	5.6%
Visiting relatives (incl. family weddings etc)	5.0%
Entertainment / attending special event - e.g. festival, performance	4.6%
Visiting friends (incl. weddings etc involving friends)	4.1%
Personal appointment / business (excl. health)	2.7%
Providing transport	2.5%
Conferences / exhibitions / conventions / tradefairs	2.2%
Gemfest/Gemfields	2.0%
Sport - participation	2.0%
Education (mostly students)	1.8%
Employment / leisure (e.g. working holiday)	1.8%
Training and research (employed - not student)	1.1%
Other	5.8%
Total	100.0%

Over forty per cent of residents ate out or went shopping on their daytrip. Visiting friends or relatives (17.5%) and a picnic/BBQ were also most popular activities (14.9%).

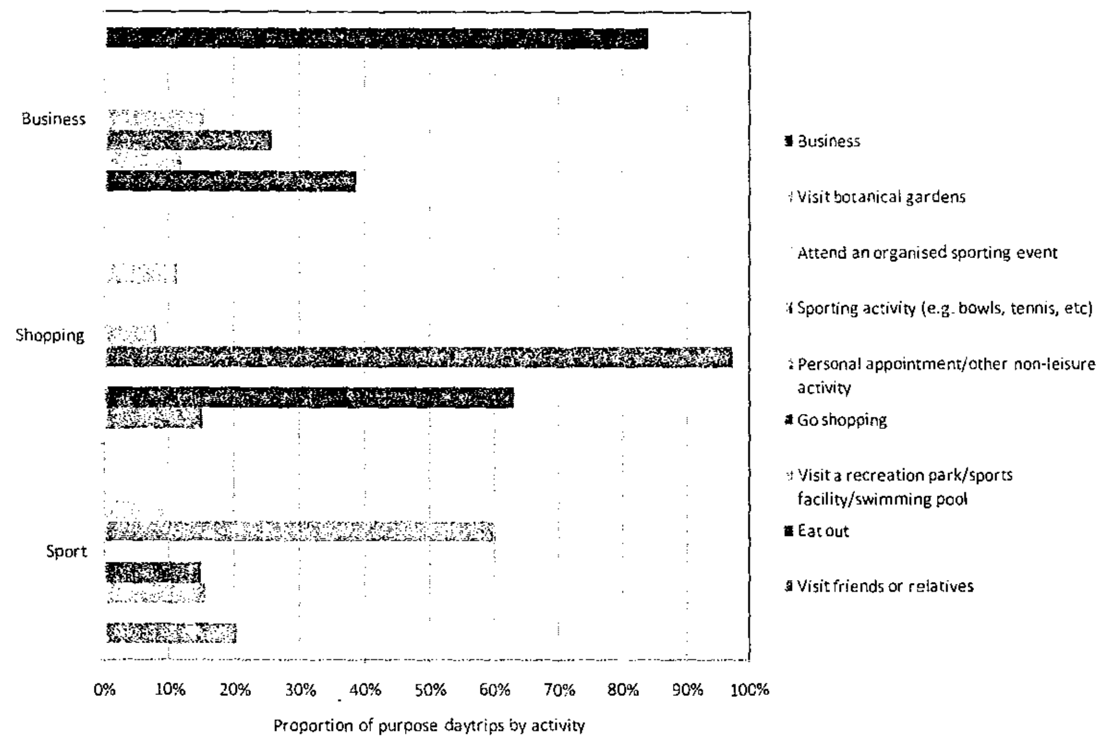
Table 19 Daytrip activities

Activities	Daytrips	% of total
Eat out	133,987	42.4%
Go shopping	126,561	40.0%
Visit friends or relatives	55,289	17.5%
Picnics / BBQs	47,092	14.9%
Business	40,919	12.9%
Personal appointment/other non-leisure activity	40,230	12.7%
General sightseeing	28,563	9.0%
Other sporting activity (e.g. bowls, tennis, etc)	27,993	8.8%
Visit a recreation park/sports facility/swimming pool	25,830	8.2%
Conference or exhibition	20,352	6.4%
Visit botanical gardens	14,953	4.7%
Bushwalking	14,065	4.4%
Visit national parks	13,801	4.4%
Visit historical sites	11,761	3.7%
Attend an organised sporting event	11,641	3.7%
Go fishing	10,948	3.5%
Go fossicking	9,181	2.9%
Go four wheel driving	6,581	2.1%
Visit clubs/pubs/movies	5,716	1.8%
Visit a farm/have a farm stay experience	3,796	1.2%
Go to the markets	2,186	0.7%
Visit museums or art galleries	1,808	0.6%
Go on an organised tour	1,004	0.3%
Visit show/festival	754	0.2%
Go bird watching	455	0.1%
Other	7,659	2.4%

Total adds to more than 100% as some respondents nominated more than one activity per daytrip.

Residents on average undertook or combined at least 2 activities into each daytrip. Figure 9 shows that of all residents indicating 'business' as the main purpose of their daytrips (84%), a relatively large proportion ate out (39%), went shopping 26%), had a personal appointment (15%), or visited a community recreation facility (12%). Residents nominating shopping as the main purpose also ate out, visited friends or relatives, or had a personal appointment. Residents nominating sport as the main daytrip purpose also visited friends or relatives, visited a recreation facility, or went shopping.

Figure 9 Activities by selected purpose



Residents were asked what improvements, if any, could be made to the particular place, attraction or facility at the main daytrip destination. Over one quarter (29.5%) said nothing or no improvements were needed. The most frequently mentioned improvements suggested were better roads, and more or a better variety of shops, and better camp ground facilities/amenities.

Table 20 Improvements suggested by daytrippers

Suggested improvements	% of daytrips
None/nothing/no improvements needed	29.5%
Improve roads/dangerous/upgrade to bitumen	20.0%
More shops/greater variety of shops/specific stores mentioned	11.2%
Improve camping grounds/hot showers/on-site drinking water/more BBQs	6.3%
Install traffic lights/roundabouts	5.7%
Improve traffic congestion	5.4%
More/improve sports facilities	4.3%
More information on events and community facilities	3.1%
More/improve children's play areas	2.6%
More parking	2.5%
More/improve bus service/public transport	2.1%
More/improve roadside rest areas/eating areas/more tables/toilets/covered areas	2.0%
Clean up/beautify area	1.8%
More/improve food outlets/cafes	0.5%
Other	5.0%
Don't know	3.9%

Total adds to more than 100% as some respondents suggested more than one improvement.

Table 21 on the following page indicates suggested improvements by main daytrip destination:

- Road improvement suggestions featured mainly for the Blackdown Tableland, Capella, Emerald, Rolleston, Rubyvale, Sapphire, and Tieri areas. Other traffic related suggestions applied to Emerald.
- Campground improvements were suggested mainly for the Blackdown Tableland and Carnarvon National Parks, Lake Maraboon, and Springsure areas.
- More shops or greater variety of shops were suggested for Blackwater and Emerald.
- The suggestion to cleaning up and beautifying the area was made mainly by daytrippers to the Gemfields area.

Table 21 Suggested improvements and main daytrip destination

Suggested Improvements	Blackdown Tableland NP	Black-water	Capella	Carnarvon NP	Duaringa	Emerald	Lake Maraboon	Rolleston	Rubyvale	Sapphire	Springsure	Tieri	Gemfields generally	All respondents
Improve roads/ upgrade bitumen	**45%**	5%	**40%**			**19%**		**78%**	**11%**	**39%**	**10%**	**100%**	**12%**	**22%**
Improve traffic congestion						**12%**								6%
Install traffic lights/ roundabouts						**13%**								6%
More parking						5%							6%	3%
More/ improve roadside rest areas	**39%**		5%			1%								2%
Improve camping grounds/ hot showers	**23%**			**34%**	4%	2%	**22%**		2%	5%	**49%**			7%
More/ improve sports facilities						2%	**11%**							5%
More/ Improve children's play areas						3%	**15%**							3%
More shops/ greater variety of shops		**11%**				**17%**					8%		5%	**12%**
More/ improve food outlets/ cafes		1%				0%			4%				5%	1%
More/ improve bus service/ public transport						3%					**26%**			2%
More information on events and community facilities		**33%**				2%			2%					3%
Clean up/ beautify area			4%		2%	**0**			**25%**				**35%**	2%
None/ nothing/ no improvements needed	27%	38%	52%		65%	24%	74%		35%	51%	41%		6%	32%
No answer		12%		66%	29%			22%	21%	5%			31%	3%

Column percentages may total more than 100% as respondents nominated more than one improvement.

For year end 30 June 2009, Central Highlands residents spent a total of $28.35 million on daytrips in the region, or an average of $89.62 per daytrip. The largest proportion of this, $10.6 million, was spent on groceries (Table 22).

Table 22 Total daytrip expenditure by item

Expenditure item	Average per daytrip	Total expenditure ($ millions)
Groceries	$33.49	$10.59
Fuel	$17.48	$5.53
Pleasure shopping, gifts, souvenirs	$16.09	$5.09
Takeaways, drinks and restaurant/café meals	$11.01	$3.48
Tours, entrance fees	$3.64	$1.15
Fishing gear/supplies	$2.23	$0.71
Fossicking gear/supplies	$0.29	$0.09
Other	$5.39	$1.70
Total/average	$89.62	$28.35

While the expenditure in Table 22 represents what residents spent on their daytrip, it may overstate what daytrippers spent, used or consumed on that daytrip on leisure-related activities. Specifically, a review of individual interview results suggest that expenditure on groceries may include expenditure on groceries for the household for more than just the day (i.e., it may include a weeks household 'shop').

If the expenditure data is adjusted to include just that expenditure on groceries that may be used on the daytrip (i.e., for a picnic or BBQ), then total daytrip expenditure is $18.51 million or $58.53 per daytrip Table 23).

Table 23 Estimated daytrip related expenditure

Expenditure item	Average per daytrip	Total expenditure ($ millions)
Fuel	$17.48	$5.53
Pleasure shopping, gifts, souvenirs	$16.09	$5.09
Takeaways, drinks and restaurant/café meals	$11.01	$3.48
Tours, entrance fees	$3.64	$1.15
Groceries[1]	$2.39	$0.76
Fishing gear/supplies	$2.23	$0.71
Fossicking gear/supplies	$0.29	$0.09
Other	$5.39	$1.70
Total/average	$58.53	$18.51

1. Excluding estimated non-leisure related household grocery expenditure.

3.2 PROFILE OF VISITORS STAYING WITH FRIENDS OR RELATIVES

For year end 30 June 2009, there were 73,151 visitors staying with friends or relatives in the Central Highlands and spending 289,355 nights in the region (Table 24). Most (51.6%) were staying in the Central area.

On average, Central Highlands' households had visitors staying with them twice in the year, with an average group size of 3.5 persons, staying 4 nights.

Table 24 VFR visits and nights by area

Area	Visits	% of total	Visitor nights	% of total	Average length of stay
South	8,807	12.0%	24,922	8.6%	2.8
East	17,711	24.2%	81,256	28.1%	4.6
Central	37,771	51.6%	155,712	53.8%	4.1
North	8,862	12.1%	27,465	9.5%	3.1
Region	73,151	100.0%	289,355	100.0%	4.0

Approximately 76 per cent of the residents of Central Highlands households had a friend or relative stay with them at least once during the year (24% did not have a friend or relative stay with them during the year). Of the households that did have a friend or relative stay with them, most (65%) stayed more than once during the year (Table 25).

Table 25 Frequency of VFR visits

Frequency of visits	% of visits
Once – this was their first time	34.2%
Twice in the year	20.7%
Three or more times during the year	45.1%
Total	100.0%

Over one third (38.6%) of visitors staying with friends or relatives (VFR) did not visit other places in the region – they stayed within the area their friends lived. Of those venturing further a field, one quarter visited Emerald, followed by Rubyvale (12.4%), Lake Maraboon (10.8%), Sapphire (10.7%) and Blackwater (9.4%)

Table 26 Places visited by VFR visitors

Places	Visits	% of total
Emerald	18,093	24.7%
Rubyvale	9,075	12.4%
Lake Maraboon	7,912	10.8%
Sapphire	7,856	10.7%
Blackwater	6,912	9.4%
Gemfields area generally	5,407	7.4%
Springsure	3,913	5.3%
Capella	3,232	4.4%
Blackdown Tableland National Park	2,725	3.7%
Tieri	1,994	2.7%
Bedford Weir	1,279	1.7%
The Willows	1,219	1.7%
Rockhampton	1,213	1.7%
Duaringa	766	1.0%
Carnarvon National Park	622	0.9%
Rolleston	383	0.5%
Bauhinia	287	0.4%
Other	7,217	9.9%
None	28,251	38.6%
Don't know	82	0.1%
Total VFR visitors	73,151	

Note: VFR visitors nominated more than one place visited

Table 27 shows the places visited by VFR visitors by where they were staying. For example, one quarter (25.4%) of visitors staying in the South area visited Springsure. The large proportion of 'None' for the East (59.8%) and North (42.1%) suggests that visitors staying in these areas were less inclined to visit other places in the region and stay close to 'home', while visitors staying in the South and Central areas were more likely to visit other places in the region.

The more frequently visited places of visitors domicile in each area were:

- South: Bauhinia, Carnarvon National Park, Rolleston, Springsure
- East: Blackdown Tableland National Park, Blackwater, Bedford Weir, Duaringa, Tieri, Rockhampton
- Central: Capella, Duaringa, Emerald, Lake Maraboon, Rubyvale, Sapphire, Gemfields generally, The Willows, Rockhampton
- North: Capella, Emerald, Rubyvale, The Willows, and Tieri

Table 27 Places visited by area living in

Area	South	East	Central	North	Region
Emerald	6.5%	10.6%	**34.4%**	**29.8%**	24.7%
Rubyvale	6.5%	3.7%	**14.6%**	**26.4%**	12.4%
Lake Maraboon	8.7%	4.5%	**16.8%**	0.0%	10.8%
Sapphire	6.5%	2.2%	**16.5%**	7.5%	10.7%
Blackwater	6.5%	**16.4%**	9.1%	0.0%	9.4%
Gem Fields	5.4%	0.0%	**12.6%**	2.1%	7.4%
Springsure	**25.4%**	0.7%	4.1%	0.0%	5.3%
Capella	0.0%	1.0%	**5.2%**	**12.3%**	4.4%
Blackdown Tableland National Park	2.9%	**6.3%**	3.6%	0.0%	3.7%
Tieri	0.0%	**2.8%**	1.5%	**10.6%**	2.7%
Bedford Weir	0.0%	**3.8%**	1.6%	0.0%	1.7%
The Willows	0.0%	0.0%	**2.7%**	**2.1%**	1.7%
Rockhampton	0.0%	**2.8%**	**1.9%**	0.0%	1.7%
Duaringa	0.0%	**1.4%**	**1.4%**	0.0%	1.0%
Carnarvon National Park	**4.3%**	0.0%	0.6%	0.0%	0.9%
Rolleston	**4.3%**	0.0%	0.0%	0.0%	0.5%
Bauhinia	**3.3%**	0.0%	0.0%	0.0%	0.4%
Other	**35.9%**	8.5%	6.8%	0.0%	9.9%
None	27.2%	**59.8%**	30.5%	**42.1%**	38.6%
Don't know	0.0%	**0.5%**	0.0%	0.0%	0.1%

Percentages add to more than 100% as some residents visited more than one place.

The most popular activities people visiting friends or relatives in the Central Highlands participated in were general sightseeing (31.8%), eating out (21.4%), shopping (19.2%), picnics/BBQs (15.8%) and fossicking (14.6%).

Table 28 Activities VFR visitors participated in

Activity	Visits	% of total
General sightseeing	23,239	31.8%
Eat out	15,651	21.4%
Go shopping	13,976	19.1%
Picnics / BBQs	11,574	15.8%
Go fossicking	10,664	14.6%
Spending time with friends or relatives	6,454	8.8%
Visit a recreation park/sports facility/swimming pool	5,585	7.6%
Bushwalking	4,806	6.6%
Visit historical sites	4,622	6.3%
Visit botanical gardens	3,664	5.0%
Visit national parks	3,239	4.4%
Go fishing	2,962	4.0%
Visit a dam/weir	2,291	3.1%
Attend an organised sporting event	2,272	3.1%
Go to the markets	1,731	2.4%
Conference or exhibition	1,243	1.7%
Go four wheel driving	949	1.3%
Other sporting activity (e.g. bowls, tennis, etc)	678	0.9%
Business	678	0.9%
Visit a farm/have a farm stay experience	564	0.8%
Visit Coal Centre/ coal mine	546	0.7%
Visit museums or art galleries	481	0.7%
Go bird watching	399	0.5%
Go on a designated tourist drive	324	0.4%
Go on an organised tour	201	0.3%
Other	5,491	7.5%
None	1,458	2.0%

Percentages add to more than 100% as some residents mentioned more than one activity.

An above average proportion of visitors staying in each of the four areas participated in the following activities (Table 29):

- South: bushwalking, spending time with friends/relatives, fishing, visiting a dam/weir, attending an organised sporting event, and picnics/BBQs
- East: go on a designated tourist drive, visit Coal Centre/coal mine, visit a farm/have a farm stay experience, go four wheel driving, attending an organised sporting event
- Central: eat out, go shopping, go bird watching, business, visit botanical gardens, other sporting activity, go fossicking, conference/exhibition, visit museums or art galleries
- North: go on an organised tour, visit historical sites, spend time with friends/relatives, go to the markets, go fossicking, and visit a dam/weir.

Table 29 VFR activities by area

Activity	Area				
	South	East	Central	North	Region
General sightseeing	5.4%	23.3%	**43.7%**	24.0%	31.8%
Eat out	10.1%	12.9%	**28.5%**	19.2%	21.4%
Go shopping	13.0%	12.5%	**24.2%**	16.8%	19.1%
Picnics / BBQs	**27.2%**	11.5%	**18.9%**	0.0%	15.8%
Go fossicking	6.5%	2.8%	**21.2%**	**17.8%**	14.6%
Spending time with friends or relatives	**22.1%**	3.1%	6.4%	**17.1%**	8.8%
Visit a recreation park/sports facility/swimming pool	2.2%	5.0%	**11.9%**	0.0%	7.6%
Bushwalking	**15.9%**	2.1%	**8.0%**	0.0%	6.6%
Visit historical sites	0.0%	5.8%	5.5%	**17.1%**	6.3%
Visit botanical gardens	0.0%	2.4%	**8.6%**	0.0%	5.0%
Visit national parks	4.3%	4.2%	**5.6%**	0.0%	4.4%
Go fishing	**6.5%**	2.4%	**5.2%**	0.0%	4.0%
Visit a dam/weir	**8.7%**	0.7%	2.7%	**4.1%**	3.1%
Attend an organised sporting event	**7.2%**	**3.1%**	2.9%	0.0%	3.1%
Go to the markets	0.0%	0.3%	**3.7%**	**3.1%**	2.4%
Conference or exhibition	0.0%	1.2%	**2.7%**	0.0%	1.7%
Go four wheel driving	0.0%	**2.0%**	**1.6%**	0.0%	1.3%
Other sporting activity (e.g. bowls, tennis, etc)	0.0%	0.0%	**1.8%**	0.0%	0.9%
Business	0.0%	0.0%	**1.8%**	0.0%	0.9%
Visit a farm/have a farm stay experience	0.0%	**0.9%**	**1.1%**	0.0%	0.8%
Visit museums or art galleries	0.0%	0.5%	**1.1%**	0.0%	0.7%
Visit Coal Centre/ coal mine	0.0%	**1.3%**	**0.8%**	0.0%	0.7%
Go bird watching	0.0%	0.0%	**1.1%**	0.0%	0.5%
Go on a designated tourist drive	0.0%	**0.9%**	0.4%	0.0%	0.4%
Go on an organised tour	0.0%	0.0%	0.2%	**1.4%**	0.3%
Visit winery / cellar door	0.0%	0.0%	0.0%	0.0%	0.0%
Other	**8.7%**	2.1%	**8.6%**	**12.7%**	7.5%
None	**3.3%**	**2.1%**	1.8%	1.4%	2.0%
Total (area's % of the region)	12.0%	24.2%	51.6%	12.1%	100.0%

Specific features or places most VFR visitors enjoyed were the Gemfields/fossicking (12.1%), Fairbairn Dam/ Dams/ Weirs, local areas/surrounds, Blackdown Tableland National Park, and Blackwater (Table 30).

Table 30 Features or places VFR visitors enjoyed most

Feature	Visits	% of total
Gem Fields / fossicking / shopping for gems	8,872	12.1%
Visiting us/our place	4,080	5.6%
Fairbairn Dam / Dams / Weirs	3,820	5.2%
Local area/surrounds	3,465	4.7%
Did not go out/did not go sightseeing	2,684	3.7%
Blackdown Tableland National Park	2,016	2.8%
Blackwater	1,943	2.7%
Peaceful/friendly	1,894	2.6%
Local shopping	1,892	2.6%
Emerald	1,885	2.6%
Fishing	1,809	2.5%
Local Lakes/Rivers	1,755	2.4%
Ag-Gro Show Day	1,755	2.4%
National Park	1,594	2.2%
Local hotels/pubs/clubs	1,300	1.8%
Water skiing	1,262	1.7%
Any natural bushland/natural trees	1,222	1.7%
Coal Centre	1,196	1.6%
Sapphire	997	1.4%
Coal Mining Fields	924	1.3%
Local restaurants/meals/cafes	880	1.2%
Weather	718	1.0%
Golf Club	646	0.9%
Botanical Gardens	479	0.7%
Beach/swimming/pool	433	0.6%
Enjoyed everything	371	0.5%
Other	3,676	5.0%
Don't know	19,581	26.8%
Total	73,151	100.0%

Visitors staying with friends or relatives in the Central Highlands region spent $7.8 million in the region in year end 30 June 2009. The largest amount, $2.2 million was spent on pleasure shopping/ gifts/ souvenirs. Visitors on average spent $26.83 per visitor night in the region (Table 31).

Table 31 VFR expenditure per visitor night

Expenditure item	Average per visitor night	Total expenditure ($ millions)
Pleasure shopping, gifts, souvenirs	$7.57	$2.19
Groceries	$6.25	$1.81
Fuel	$4.74	$1.37
Takeaways, drinks and restaurant/café meals	$4.40	$1.27
Accommodation	$0.94	$0.27
Tours, entrance fees	$0.89	$0.26
Fossicking gear/supplies	$0.10	$0.03
Care hire	$0.06	$0.02
Fishing gear/supplies	$0.02	$0.01
Other	$1.86	$0.54
Total/average	$26.83	$7.76

3.3 Profile of Holiday Leisure Visitors to the Central Highlands Region

Of the 326,220 visitors to the Central Highlands region in year end June 2009, 175,810 or 53.9 per cent visited the region for the main purpose of holiday, leisure, or other purposes (including visiting friends or relatives, but excluding business or corporate travellers), spending 750,055 nights in the region (and staying on average 4.3 nights). The survey results in this section of the report represent the characteristics of holiday leisure (non-business) travellers in the region.

3.3.1 Usual place of residence

Over half (55.6%) of all holiday leisure visitors were from interstate, with almost one third (31.1%) from New South Wales. Forty-one percent of visitors were from Queensland, and one quarter was from South East Queensland. Just over one per cent of visitors were from overseas (Table 32).

Table 32 Visitors by usual place of residence

Origin	% of visitors	
South East Queensland		**25.1%**
Brisbane	20.0%	
Gold Coast	1.7%	
Sunshine Coast	1.7%	
West Moreton	1.7%	
Other Queensland		**16.4%**
Wide Bay-Burnett	3.4%	
Fitzroy	4.9%	
Mackay	2.3%	
Northern	1.0%	
Darling Downs	2.0%	
Far North	2.4%	
Central West	0.3%	
South West	0.1%	
Total Queensland	*41.5%*	
New South Wales		**31.1%**
Sydney	17.0%	
Other NSW	14.1%	
Victoria		**18.5%**
Melbourne	3.3%	
Other VIC	15.3%	
Other Interstate		**6.0%**
ACT	0.6%	
Adelaide	1.4%	
NT	0.4%	
Other SA	0.8%	
Other WA	0.4%	
Perth	0.4%	
TAS	2.0%	
Total Interstate	*55.6%*	
Overseas		**1.5%**
No response	1.3%	1.3%
Total	100.0%	100.0%

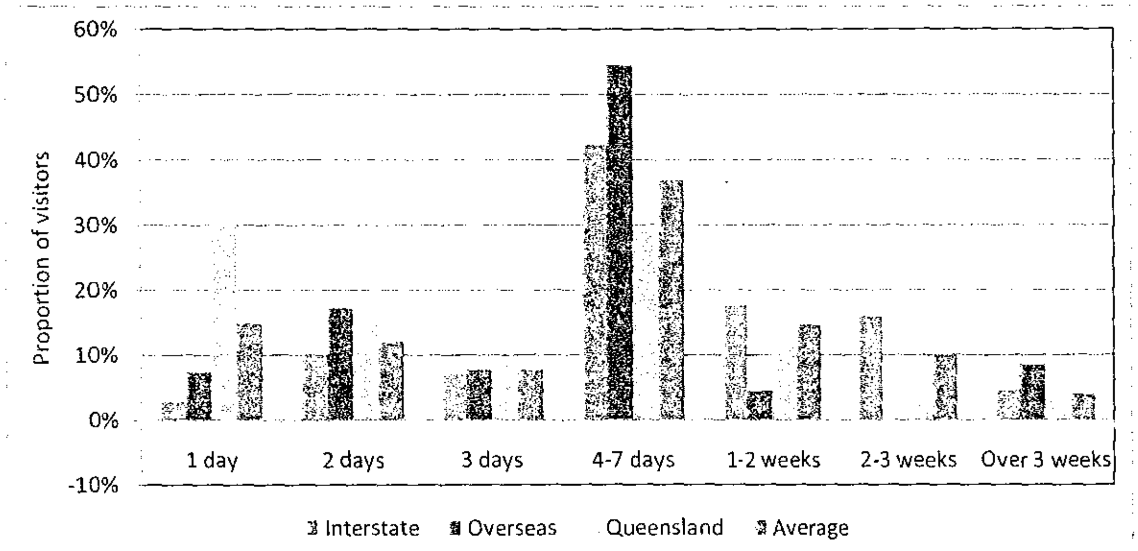
Interstate visitors are relatively more significant for the Central Highlands as their greater average length of stay translates into 70 per cent of total visitor nights.

Table 33 Visitors and nights by origin

Origin	Visitors		Nights		Ave stay
	No.	% of total	No.	% of total	nights
Queensland	74,033	42.1%	218,361	29.1%	2.9
Interstate	99,105	56.4%	521,212	69.5%	5.3
Overseas	2,674	1.5%	10,482	1.4%	3.9
Total	175,812	100.0%	750,055	100.0%	4.3

Approximately half of all Queensland visitors spend one to two days in the region. Approximately forty per cent of interstate visitors spend 1 to 3 weeks in the region.

Figure 10 Length of stay by usual place of residence

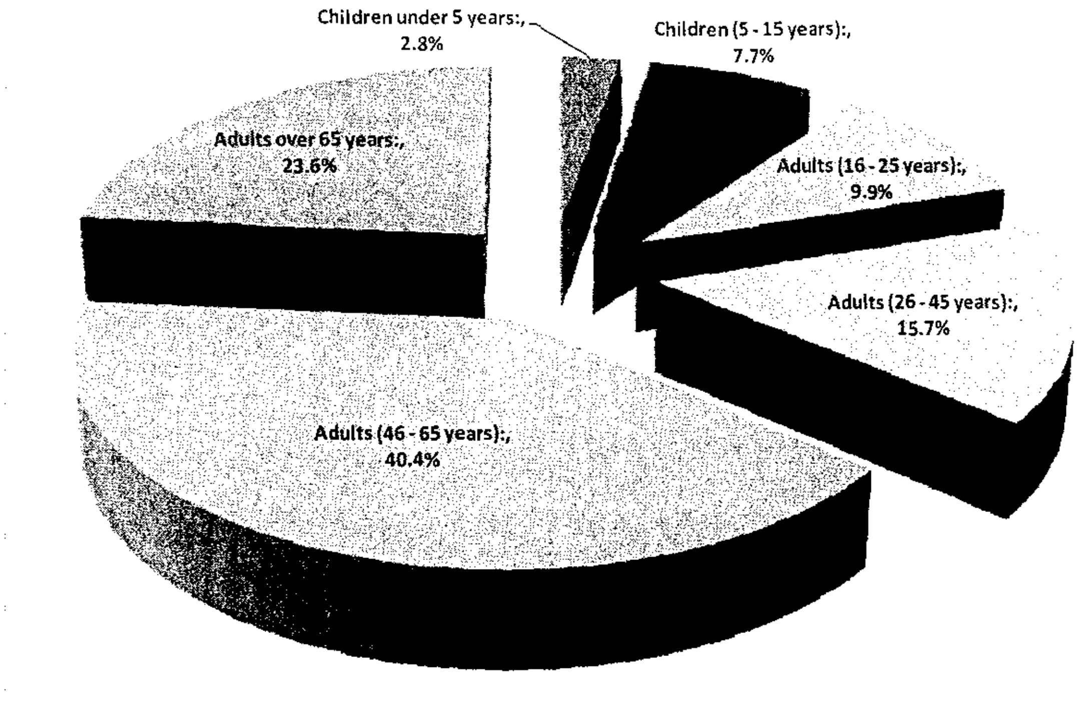


3.3.2 SIZE AND AGE OF TRAVEL PARTY

The average size of the travel party (people in the immediate group among whom expenses were being shared) was 2.2 persons. The largest proportion (40%) of people travelling together was the 46 to 65 years age group (Figure 11).

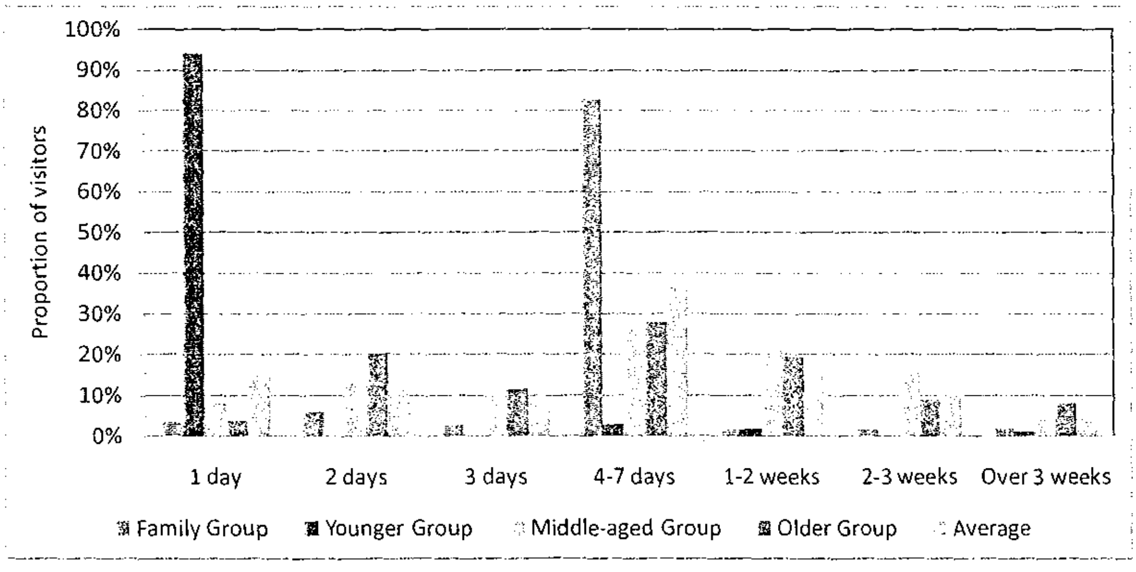
Family groups comprise a travel party with one or more children aged 15 years and under. A Younger Group is a travel party with no children, and where most of the people in the travel party are aged 16 to 25 years. A Middle-aged Group has no children, with the majority of the people in the travel party aged 26 to 65 years. An Older Group has no children, with the majority of the people in the travel party aged over 65 years.

Figure 11 Proportion of visitors by age group



Most younger travellers spent just one day in the region, while most families spent 4 to 7 days in the region. Most middle-aged and older groups spent four days or longer in the region.

Figure 12 Length of stay by type of travel party



The significance of older visitors increases in light of their greater average length of stay, contributing one quarter (25.7%) of total holiday leisure visitor nights in the region (Table 34).

Table 34 Visitors and nights by group type

Group type	Visitors No.	Visitors % of total	Nights No.	Nights % of total	Ave stay nights
Family Group	36,743	20.9%	160,655	21.4%	4.4
Younger Group	17,154	9.8%	22,696	3.0%	1.3
Middle-aged Group	89,975	51.2%	373,980	49.9%	4.2
Older Group	31,940	18.2%	192,724	25.7%	6.0
Total	175,812	100.0%	750,055	100.0%	4.3

The significance of family groups becomes apparent when the number of people travelling in each type of group is taken into account – 4.4 persons compared to the average of 2.2 persons.

Table 35 Average group size by origin and group type

(No. of persons)	Origin			
Group type	**Queensland**	**Interstate**	**Overseas**	**Average**
Family Group	4.4	4.4	-	4.4
Younger Group	3.6	-	4.5	3.9
Middle-aged Group	2.2	2.0	2.5	2.1
Older Group	2.0	2.1	2.0	2.0
Average	2.3	2.1	2.7	2.2

3.3.3 PURPOSE THE TRIP TO THE CENTRAL HIGHLANDS

There are significant differences in the purpose[3] of visit for areas within the Central Highlands. While half of all non-business visitors visited the region for the purpose of a holiday, three quarters of visitors staying in the Gemfields or South for the purpose of a holiday, while most visitors in the North and East area were visiting a friend or relative. Visitors to the Central area reflected largely the regional profile, but had a large proportion of visitors travelling for other purposes (i.e., vehicle repairs).

Table 36 Visitors by purpose and area

(% of visitors)	Area					
Purpose	**Gemfields**	**Central**	**East**	**North**	**South**	**Central Highlands**
Holidays	**76.7%**	42.9%	31.0%	17.8%	**73.1%**	51.0%
Visiting friends/relatives	14.7%	25.5%	**62.5%**	**81.6%**	21.7%	32.4%
Work or business	0.4%	**3.9%**	**5.3%**	0.0%	1.9%	3.0%
Attend an event	**3.7%**	**3.3%**	0.2%	0.0%	0.4%	2.0%
Entertainment	**1.1%**	**1.2%**	0.1%	0.0%	0.3%	0.7%
Shopping	0.0%	0.3%	0.0%	0.0%	0.0%	0.1%
Sport	0.1%	0.3%	0.0%	0.4%	**1.1%**	0.4%
Other	3.3%	**22.6%**	0.9%	0.2%	1.5%	10.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
% by area	12.3%	42.1%	15.6%	6.0%	24.0%	100.0%

[3] A small number of visitors interviewed nominated work or business as the main purpose of their visit to the Central Highlands, most of whom also nominated other purposes for their visit to the region.

3.3.4 Length of stay

Average length of stay of visitors varies considerably by area and purpose. The Gemfields experienced the greatest average length of stay, and the South area the shortest. Visiting for the purpose of work or business and sport generally attracted longer visits, and shopping, entertainment or attending an event a shorter visit (Table 37).

Table 37 Average length of stay by purpose and area

(nights)	Area					
Purpose	Gemfields	Central	East	North	South	Central Highlands
Holidays	6.2	6.2	2.6	8.8	2.4	4.6
Visiting friends/relatives	3.4	6.4	4.6	3.2	2.7	4.6
Work or business	0.3	9.0	3.1	na	5.2	6.7
Attend an event	2.4	1.6	2.2	3.5	2.1	1.9
Entertainment	3.1	1.2	0.2	na	1.5	1.6
Shopping	na	1.4	na	na	na	1.4
Sport	1.8	2.4	na	7.4	5.5	4.5
Other	10.0	1.2	3.4	3.7	1.5	1.6
Average	5.7	5.0	3.9	4.2	2.5	4.3

3.3.5 Previous visits to the region

Most (81.1%) overseas visitors were first time visitors to the region, as were visitors from Queensland (52.9%). Most (60.0%) interstate visitors had visited the region before, with 19 per cent of interstate visitors having visited the region at least four times previously.

Table 38 Proportion of visitors by previous visit and origin

(% of visitors)	Origin			
Previous visit	Queensland	Interstate	Overseas	Total/average
Never before, this is my first visit	52.9%	40.0%	81.1%	46.1%
1-2 times	25.5%	37.9%	18.9%	32.4%
3-4 times	11.9%	2.7%	0.0%	6.5%
More than 4 times	9.7%	19.3%	0.0%	15.0%
Total	100.0%	100.0%	100.0%	100.0%

Most visitors in the younger age group were first time visitors to the region. Most (59.0%) families had been to the region 1 to 2 times previously. Middle-aged and older visitors were the more frequent repeat visitors to the region (Table 39).

Table 39 Proportion of visitors by previous visit and group type

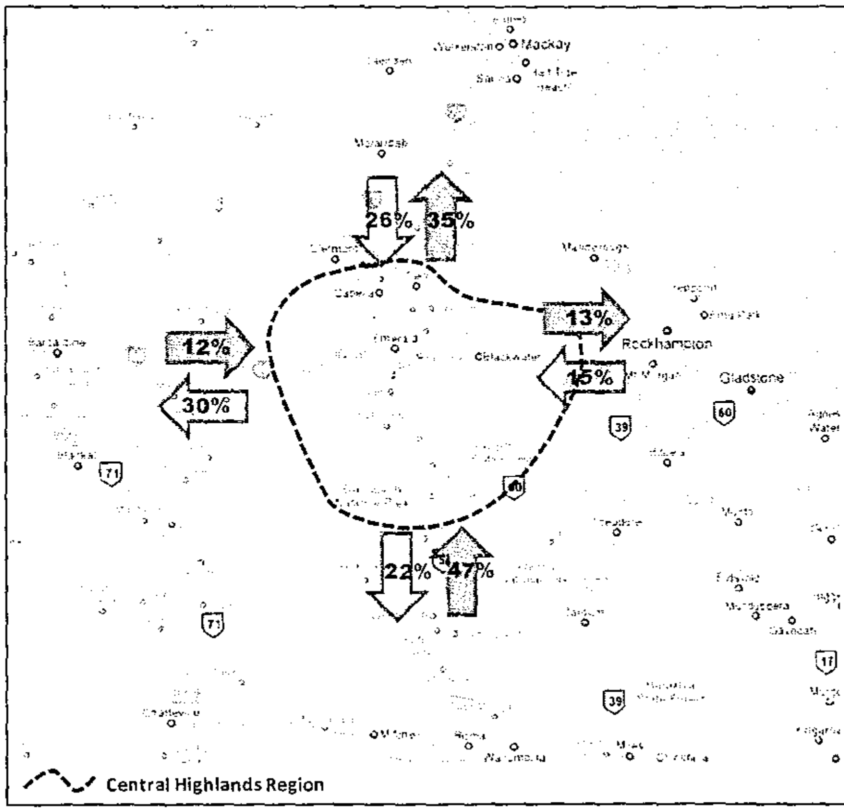
(% of visitors)	Group type				
Previous visit	Younger Group	Family Group	Middle-aged Group	Older Group	Total
Never before, this is my first visit	96.2%	38.9%	39.8%	46.4%	46.2%
1-2 times (not including this visit)	0.0%	59.0%	25.3%	38.5%	32.4%
3-4 times (not including this visit)	2.1%	1.5%	8.7%	8.4%	6.5%
More than 4 times (not including this visit)	1.8%	0.5%	26.2%	6.7%	14.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

3.3.6 Previous and next stops outside the Central Highlands

The largest proportion (47%) of visitors to the Central Highlands arrived from towns and cities south of the region. Twenty six percent of visitors spent the night in a town or city north of the Central Highlands before arriving. Fifteen per cent of visitors arrived from the east and 12 per cent from the west.

On departure from the region, 35 per cent of visitors travelled to towns north of the Central Highlands, 30 per cent to towns west of the region, 22 per cent travelled south and 13 per cent travelled east (Figure 13).

Figure 13 Direction of visitor travel - summary

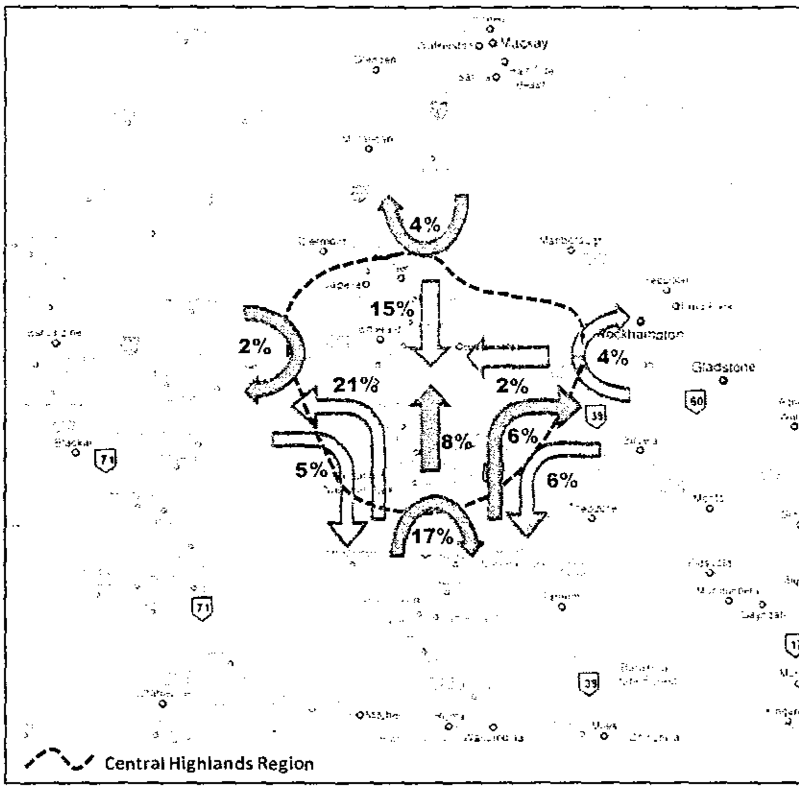


Visitor Flows

Direction	From	To
South	47%	22%
North	26%	35%
East	15%	13%
West	12%	30%
Total	100%	100%

The predominate direction of visitor flow to and from the region was from south to west, with 21 per cent of visitors arriving from the south, visiting the Central Highlands, then travelling on to towns or cities to the west of the region. The next largest flows were from south to south (17%), north to south (15%), and south to north (8%). Figure 13 and Figure 14 indicate the importance of towns near the southern, northern and eastern borders of the Central Highlands as visitor gateways to the region. The south in particular, as the gateway through which the largest proportion of visitors arrive (47%) and as the only gateway of arrival for 17 per cent of visitors to the Central Highlands.

Figure 14 Direction of visitor travel - detail



Visitor Flows*

Direction	% of visitors
South to West	21%
South to South	17%
North to South	15%
South to North	3%
East to South	6%
South to East	6%
West to South	5%
North to North	4%
East to East	4%
North to East	3%
West to East	3%
West to West	2%
East to West	2%
West to North	1%
North to West	1%
East to North	1%

*Based on the town visitors stayed in prior to arriving in the region, and next town staying in after leaving the region.

3.3.7 INFORMATION SOURCES USED WHEN PLANNING THE VISIT

The sources of information used by the largest number of visitors in planning the visit were prior knowledge (43.0%), recommendation by a friend/relative (41.9%), a visitor or tourist guide/book (38.7%), visitor information centre (35.3%), Google (31.9%), and motoring organisations (26.5%). Visitors from Queensland tended to use motoring organisations and the Queensland Holidays website more for planning information, more interstate visitors used a visitor or tourist guide/book, Visitor information centre or recommendation by friends/relatives, while more overseas visitors used a visitor tourist guide/ book, Central Queensland Holiday Planner, or travel brochure/magazine (Table 40).

Table 40 Proportion of visitors by information source and origin

% of visitors	Origin			
Information source	Queensland	Interstate	Overseas	Total
Been before/prior knowledge of the region	29.8%	**53.5%**	19.0%	43.0%
Recommendation by friends/relatives	28.9%	**51.9%**	36.6%	41.9%
Visitor or tourist guide/book	24.9%	**48.5%**	**57.7%**	38.7%
Visitor information centre	25.3%	**42.9%**	32.2%	35.3%
Google	**39.4%**	26.8%	10.3%	31.9%
Motoring organisations	**33.6%**	21.8%	3.9%	26.5%
www.queenslandholidays.com.au	**25.3%**	1.8%	0.0%	11.6%
Travel brochure/magazine	8.6%	**11.5%**	**40.4%**	10.7%
Articles, documentaries or news story	**7.2%**	4.5%	4.5%	5.7%
Queensland Parks and Wildlife website	**7.8%**	2.0%	3.9%	4.5%
Other Internet site	**4.5%**	3.3%	0.0%	3.8%
Central Queensland Highlands Planner	**5.0%**	1.6%	**13.1%**	3.2%
Included in tour/coach/holiday package	**2.3%**	1.6%	0.0%	1.9%
State or national tourism agency	**1.9%**	1.3%	0.0%	1.6%
www.capricornholidays.com.au	**0.9%**	0.1%	0.0%	0.5%
Recommendation by tour desk/travel agent	**0.7%**	0.1%	0.0%	0.4%

Percentages add to more than 100% as visitors nominated more than one information source.

There were marked differences in the information used by the different travel group types (Table 41):

- Families: Visitor or tourist guide/book, Visitor information centre, Recommendation by friends/relatives, Motoring organisations, Queensland Parks and Wildlife website, Central Queensland Highlands Planner, Been before/prior knowledge of the region, and Google.
- Younger travellers: Motoring organisations, www.queenslandholidays.com.au, and Google.
- Middle-aged visitors: State or national tourism agency, Queensland Parks and Wildlife website, Travel brochure/magazine, Articles, and other Internet sites.
- Older travellers: State or national tourism agency, www.capricornholidays.com.au, Travel brochure/magazine, Included in tour/coach/holiday package, Articles, documentaries or news story, Been before/prior knowledge of the region, and other Internet site.

Table 41 Proportion of visitors by information source and group type

% of visitors	Group Type				
Information source	Family Group	Younger Group	Middle-aged Group	Older Group	Total
Visitor or tourist guide/book	**67.4%**	2.9%	32.2%	**42.6%**	38.6%
Been before/prior knowledge of the region	**56.8%**	1.0%	**44.9%**	42.6%	42.8%
Visitor information centre	**62.0%**	2.1%	29.8%	**38.3%**	35.4%
Recommendation by friends/relatives	**81.8%**	2.8%	36.6%	30.4%	41.7%
Travel brochure/magazine	1.6%	0.0%	**14.3%**	**17.3%**	10.8%
Google	**61.8%**	**94.1%**	15.3%	10.9%	31.9%
Motoring organisations	**54.2%**	**93.3%**	7.4%	10.8%	26.1%
Articles, documentaries or news story	1.0%	0.0%	**7.8%**	**8.0%**	5.6%
Other Internet site	2.0%	0.0%	**5.1%**	**5.1%**	4.0%
Included in tour/coach/holiday package	0.8%	0.0%	1.7%	**4.3%**	1.8%
www.queenslandholidays.com.au	0.8%	**94.1%**	3.0%	4.0%	11.5%
Queensland Parks and Wildlife website	4.0%	0.0%	**5.9%**	3.8%	4.6%
Central Queensland Highlands Planner	**7.9%**	0.0%	2.2%	2.8%	3.3%
State or national tourism agency	1.4%	0.0%	**1.8%**	**1.6%**	1.5%
www.capricornholidays.com.au	**0.7%**	0.0%	0.4%	**1.5%**	0.6%
Recommendation by tour desk/travel agent	0.0%	0.0%	**0.5%**	**0.5%**	0.3%

Percentages add to more than 100% as visitors nominated more than one information source.

3.3.8 TYPE OF ACCOMMODATION USED

The largest proportion (43.1%) of holiday leisure visitors to the Central Highlands region stayed in a caravan (either at a caravan park, state or national park, or camping reserve). The next most significant form of accommodation used was staying with friends or relatives. A relatively small proportion of visitors stayed in a hotel or motel.

Some visitors also used more than one form of accommodation during their visit to the Central Highlands (see Attachment 1):

- 16.5 per cent of visitors staying primarily in a hotel or motel also stayed in a caravan park or commercial camping ground, and 7.4 per cent also stayed at a friends or relatives property.
- 5.2 per cent of visitors staying primarily in a Caravan park or commercial camping ground also stayed by the side of a road or on a private property, 5.0 per cent stayed in a state or national park, 3.3 per cent stayed in a rented house or unit, and 1 per cent with friends or relatives.
- 11.6 per cent of visitors staying primarily in a caravan /camping in a state or national park also stayed beside the road or on private property, and 2.0 per cent stayed at a friend or relatives property.
- 4.8 per cent of visitors staying primarily in a caravan /camping by side of road or on private property also stayed at a friends or relatives property.

Queensland visitors tended to stay in a caravan or camp in a state or national park, in a hotel or motel, or their own property. Relatively more interstate visitors stayed at a caravan park or with friends or relatives, and a larger proportion of overseas visitors stayed in a caravan (either at a caravan park, state or national park, or camping reserve).

Table 42 Visitors by accommodation used and origin

(% of visitors)	Origin			
Accommodation type	Queensland	Interstate	Overseas	Total
Friends or relatives property	33.6%	**46.7%**	0.0%	40.5%
Caravan park or commercial camping ground	27.6%	**35.9%**	**58.9%**	32.8%
Hotel/ motel / motor inn/ resort	**26.5%**	7.0%	10.3%	15.2%
Caravan /camping in a state or national park	**6.3%**	4.5%	**4.5%**	5.3%
Caravan /camping by side of road/prvte property	4.7%	4.7%	**23.5%**	5.0%
Own property	**1.1%**	0.6%	0.0%	0.8%
Rented house / apartment / unit / holiday flat	0.0%	0.5%	0.0%	0.3%
Other	0.1%	0.1%	**2.7%**	0.1%
Passing through	0.0%	0.0%	0.2%	0.0%
Total	100.0%	100.0%	100.0%	100.0%

Note: there are minor differences in the average distribution by accommodation type between Table 42 and Table 43 due to small differences in the level of origin and group type non response.

Families tended to prefer staying in a caravan or camping at a state or national park or with friends or relatives. Most younger travellers stayed with friends or relatives. A relatively large proportion of middle aged visitors stayed in a caravan (at a caravan park or camping reserve) or at a hotel or motel. Compared to all visitors, older visitors preferred staying in a caravan (either at a caravan park, state or national park, or camping reserve), in a hotel or motel, or their own property (Table 43).

Table 43 Visitors by accommodation used and group type

(% of visitors)	Group type				
Accommodation type	Family Group	Younger Group	Middle-aged Group	Older Group	Average
Caravan /camping by side of road	0.0%	2.8%	**6.4%**	**7.6%**	4.9%
Caravan /camping in a national park	**5.1%**	0.8%	5.8%	**7.0%**	5.4%
Caravan park or camping ground	13.1%	3.1%	**38.6%**	**57.3%**	33.2%
Friends or relatives property	**76.4%**	**93.3%**	28.5%	1.9%	39.9%
Hotel/ motel / motor inn/ resort	5.0%	0.0%	**19.8%**	**22.2%**	15.2%
Other	0.0%	0.0%	0.0%	0.7%	0.1%
Own property	0.0%	0.0%	0.4%	**3.2%**	0.8%
Passing through	0.1%	0.1%	0.0%	0.0%	0.0%
Rented house/apartment/unit /flat	0.4%	0.0%	0.4%	0.0%	0.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

3.3.9 ACTIVITIES UNDERTAKEN IN THE REGION

In addition to general sightseeing, the larger proportions of visitors visited national parks, friends or relatives, went fossicking, visited a museum or art gallery, or historical sites.

Compared to all visitors, a larger proportion of Queensland visitors visited historical sites, went bushwalking, picnics/BBQs, markets, went four wheel driving, and went on an organised tour. A larger than average proportion of interstate visitors visited national parks, friends or relatives, went fossicking, visited museums/galleries, went shopping, fishing, on a designated tourist drive, visited a recreation park/ sports facility/ swimming pool, and went bird watching. A larger than average proportion of overseas visitors visited national parks, went fossicking, bushwalking, visited botanical gardens, went shopping, to markets, visited a recreation park/ sports facility/ swimming pool, attended a conference and went bird watching (Table 44).

Table 44 Proportion of visitors by activities participated in and origin

% of visitors	Origin			
Activities	**Queensland**	**Interstate**	**Overseas**	**All visitors**
General sightseeing	89.0%	**95.7%**	92.8%	92.8%
Visit friends or relatives	43.9%	**51.5%**	23.5%	47.9%
Visit national parks	**50.0%**	43.1%	**61.2%**	46.3%
Go fossicking	30.6%	**55.7%**	**64.7%**	45.3%
Eat out	**44.0%**	43.5%	43.6%	43.7%
Bushwalking	**52.2%**	32.8%	**50.9%**	41.2%
Go shopping	21.3%	**49.7%**	**41.2%**	37.6%
Picnics / BBQs	34.1%	**37.0%**	**35.9%**	35.7%
Visit historical sites	**43.9%**	29.1%	**39.0%**	35.5%
Visit museums or art galleries	19.5%	**46.3%**	34.3%	34.8%
Visit botanical gardens	**37.5%**	27.1%	**34.3%**	31.6%
Go to the markets	**40.3%**	17.4%	**36.7%**	27.3%
Go fishing	11.7%	**36.6%**	0.0%	25.6%
Go four wheel driving	**34.6%**	18.2%	0.0%	24.8%
Go on a designated tourist drive	13.4%	**32.0%**	13.1%	23.9%
Go on an organised tour	**30.1%**	7.4%	**17.3%**	17.1%
Visit a rec park/sports facility/pool	6.1%	**23.6%**	**18.0%**	16.1%
Go bird watching	8.0%	**18.8%**	**23.5%**	14.3%
Conference / exhibition / trade fair	**4.3%**	1.8%	**12.7%**	3.0%
Visit winery / cellar door	**3.1%**	1.4%	0.0%	2.1%
Visit a farm/farm stay experience	**2.2%**	1.8%	0.0%	2.0%
Other sporting activity	**2.1%**	0.7%	**7.8%**	1.4%
Golf	1.1%	**1.4%**	0.0%	1.2%
Attend an organised sporting event	**0.4%**	**0.4%**	0.0%	0.4%

A larger than average proportion of visitors in each group type participated in the following activities:

- Families: General sightseeing, Visit friends or relatives, Go fossicking, Visit museums or art galleries, Picnics / BBQs, Go fishing, Go on a designated tourist drive, Visit a recreation park/ sports facility/ swimming pool. [4]

- Younger age group: General sightseeing, Visit national parks, Visit friends or relatives, Visit historical sites, Eat out, Bushwalking, Visit botanical gardens, Picnics / BBQs, Go to the markets, Go four wheel driving, and Go on an organised tour.

- Middle-age group: Visit national parks, Go fossicking, Visit museums or art galleries, and Go bird watching.

- Older age group: Visit historical sites, Eat out, Go shopping, Go to the markets, and Go bird watching.

[4] The appeal and importance of fossicking to families is confirmed by the fact that 70% of the 2,199 fossicking permits issued by the Department of Mines and Energy in 2008/09 were to families.

Table 45 Proportion of visitors by activities participated and group type

% of visitors	Group Type				
Activities	Family Group	Younger Group	Middle-aged Group	Older Group	All visitors
General sightseeing	**98.0%**	**99.2%**	90.3%	89.6%	92.6%
Visit friends or relatives	**79.4%**	**96.4%**	36.2%	17.9%	47.7%
Visit national parks	12.4%	**94.1%**	**51.5%**	45.2%	46.3%
Go fossicking	**72.3%**	5.9%	44.5%	37.3%	45.3%
Eat out	22.0%	**96.4%**	**43.8%**	40.0%	43.6%
Bushwalking	15.1%	**95.1%**	**43.3%**	37.5%	41.3%
Go shopping	20.9%	3.1%	**47.1%**	**48.2%**	37.6%
Visit historical sites	10.6%	**96.4%**	31.3%	**44.8%**	35.7%
Picnics / BBQs	**74.3%**	**99.2%**	11.8%	23.6%	35.5%
Visit museums or art galleries	**61.0%**	2.1%	33.6%	24.1%	34.6%
Visit botanical gardens	11.2%	**93.3%**	28.3%	31.5%	31.6%
Go to the markets	3.0%	**96.4%**	20.3%	**40.0%**	27.5%
Go fishing	**57.4%**	0.8%	19.4%	19.1%	25.5%
Go four wheel driving	2.7%	**93.3%**	**25.4%**	11.8%	24.7%
Go on a designated tourist drive	**70.4%**	0.0%	9.8%	21.3%	23.7%
Go on an organised tour	12.1%	**93.3%**	7.2%	9.1%	16.9%
Visit a rec park/sports facility/pool	**61.4%**	0.0%	3.7%	6.2%	15.9%
Go bird watching	4.4%	0.0%	**19.7%**	**18.4%**	14.3%
Conference / exhibition / trade fair	0.0%	0.0%	**3.8%**	**5.9%**	3.0%
Visit winery / cellar door	0.0%	0.0%	**2.3%**	**4.9%**	2.1%
Visit a farm/farm stay experience	0.8%	0.0%	**2.0%**	**4.0%**	1.9%
Other sporting activity	0.0%	0.0%	1.0%	**5.1%**	1.4%
Golf	0.0%	0.0%	**1.9%**	**1.4%**	1.2%
Attend an organised sporting event	0.0%	0.0%	**0.7%**	0.3%	0.4%

3.3.10 Visits to towns or places in the Central Highlands

Visitors were asked which places in the Central Highlands they stopped at or planned to stop at during their visit to the region. Responses to 'Passed through', 'Not travelling through' and non response can be difficult to interpret. Therefore the analysis focuses on places visitors stopped at during the day or overnight.

The places that a larger proportion of visitors tended to stop at during the day were Emerald (27.9%), Willows / Anakie (18.0%), Blackwater (18.2%) Sapphire (16.8%), Rubyvale (12.9%), Springsure (12.3%) and Rolleston (10.5%). The places that larger proportions of holiday leisure visitors spent one or more nights at were Carnarvon National Park, Emerald, Blackwater (including Bedford Weir), Lake Maraboon, Sapphire and Rubyvale (Table 46).

Table 46 Proportion of visitors by places visited

% of visitors / Place visited	Stay / visit						
	Passed through	Stopped during the day	Stayed one night	Stayed more than 1 night	Not travelling through	No response	Total
Bauhinia	6.7%	0.6%	0.1%	0.0%	37.4%	55.2%	100.0%
Blackdown Tableland NP	0.1%	1.3%	0.3%	0.8%	68.5%	29.2%	100.0%
Blackwater	15.9%	18.2%	2.6%	8.6%	34.6%	20.1%	100.0%
Capella	14.1%	5.6%	3.2%	2.0%	3.2%	71.9%	100.0%
Carnarvon NP	0.2%	1.4%	7.7%	11.6%	58.9%	20.1%	100.0%
Duaringa	20.7%	5.6%	1.8%	1.7%	36.0%	34.1%	100.0%
Emerald	8.4%	27.9%	11.4%	25.1%	20.5%	6.7%	100.0%
Lake Maraboon	1.8%	9.4%	0.7%	8.1%	47.4%	32.6%	100.0%
Rolleston	27.2%	10.5%	1.6%	0.8%	29.0%	30.7%	100.0%
Rubyvale	11.0%	12.9%	0.9%	6.0%	42.5%	26.7%	100.0%
Sapphire	12.3%	16.8%	0.9%	4.0%	31.5%	34.6%	100.0%
Springsure	26.4%	12.3%	1.4%	1.4%	28.3%	30.1%	100.0%
Tieri	2.1%	2.5%	0.0%	0.0%	28.1%	67.3%	100.0%
Willows / Anakie	16.9%	18.0%	0.2%	2.7%	40.9%	21.3%	100.0%
Other places	3.7%	8.5%	1.6%	8.8%	12.0%	65.5%	100.0%

A large proportion of visitors overnighted in two or more places in the Central Highlands during their visit (Table 47). A relatively large proportion of holiday leisure visitors to the Gemfields stay at two or more places in the Gemfields, notwithstanding the relative proximity of towns in this area.

Table 47 Overnight destinations

Visitors staying in	Also stayed at
Blackdown Tableland National Park	Carnarvon National Park, Emerald, Lake Maraboon
Blackwater	Carnarvon National Park
Capella	Emerald, Carnarvon National Park, Springsure
Carnarvon National Park	Emerald, Lake Maraboon
Duaringa	Blackwater, Sapphire
Emerald	Carnarvon National Park
Lake Maraboon	Carnarvon National Park, Emerald, Rubyvale
Rolleston	Emerald, Carnarvon National Park, Rubyvale
Rubyvale	Carnarvon National Park, Emerald, Lake Maraboon, Sapphire
Sapphire	Rubyvale, Emerald, Blackwater, Willows/Anakie
Springsure	Carnarvon National Park, Rubyvale, Capella
Willows / Anakie	Carnarvon National Park, Rubyvale, Sapphire, Emerald

Note: see Attachment 2 for additional detail.

3.3.11 RATING OF SERVICES AND FACILITIES

Visitors to the Central Highlands were generally satisfied with most features of their visit. Some features were not rated by over half of all visitors (either because visitors they didn't know or didn't use them, or otherwise did not answer). These features were:

- Commercial accommodation,
- Nightlife,
- Tours,
- Shopping,
- Availability unique local art/craft, and
- Fossicking opportunities.

Those features rated as very satisfied by over half of all visitors included:

- Information services,
- Local atmosphere,
- Personal safety/security, and
- Friendliness of locals.

Features rated as very dissatisfied by a relatively large proportion of visitors included:

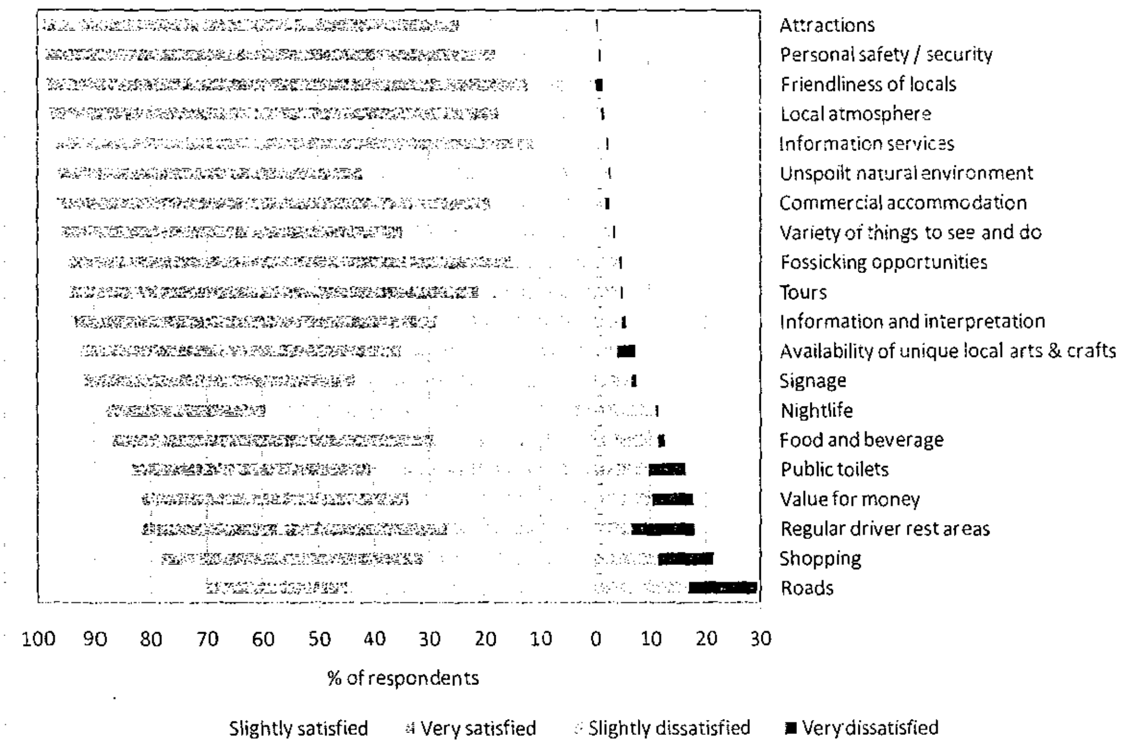
- Roads,
- Shopping,
- Value for money,
- Public toilets, and
- Regular driver rest areas.

Table 48 Proportion of visitors by satisfaction with selected features

% of visitors	Satisfaction						
Activities	Very satisfied	Slightly satisfied	Slightly dissatisfied	Very dissatisfied	Don't know, didn't use	No response	Total
Commercial accommodation	28%	6%	1%	1%	41%	23%	100%
Nightlife	4%	11%	1%	1%	51%	32%	100%
Tours	8%	2%	1%	0%	56%	33%	100%
Shopping	25%	23%	9%	9%	16%	18%	100%
Availability unique local art/craft	9%	6%	1%	1%	50%	32%	100%
Fossicking opportunities	36%	5%	1%	0%	28%	29%	100%
Food and beverage	34%	20%	14%	1%	13%	17%	100%
Attractions	40%	26%	1%	0%	10%	23%	100%
Information services	58%	7%	1%	0%	22%	13%	100%
Value for money	34%	27%	9%	10%	4%	17%	100%
Variety of things to see and do	37%	36%	2%	0%	3%	22%	100%
Local atmosphere	65%	15%	1%	1%	3%	17%	100%
Regular driver rest areas	31%	16%	5%	5%	21%	21%	100%
Personal safety / security	53%	13%	0%	0%	11%	22%	100%
Signage	48%	29%	3%	1%	1%	19%	100%
Friendliness of locals	75%	13%	0%	1%	1%	11%	100%
Roads	24%	37%	12%	15%	1%	11%	100%
Unspoilt natural environment	36%	40%	2%	0%	6%	16%	100%
Public toilets	37%	27%	7%	8%	9%	12%	100%
Information and interpretation	44%	21%	2%	0%	8%	25%	100%

With roads, some visitors were very satisfied with these, while others rated these as very unsatisfactory. Responses from other parts of the survey suggest that visitors were generally happy with the main highways, with dissatisfaction lying primarily with local access roads (the road into Carnarvon National Park being mentioned frequently as poor or unsafe).

Figure 15 Satisfaction with trip attributes



3.3.12 What visitors enjoyed most about their visit

The main features visitors enjoyed most about their visit to the Central Highlands were:

- Friendliness of / hospitality / service / meeting locals,
- National Parks / Carnarvon / Blackdown / Minerva Hills,
- Weather / climate / warmth,
- Visiting the Gemfields / Gemfest, and
- Lake Maraboon / Red Claw / Fairbairn Dam / Bedford Weir.

Table 49 What visitors enjoyed most about their visit

Enjoyed most	% of visitors
Friendliness of / hospitality / service / meeting locals	25.4%
Weather / climate / warmth	15.9%
Visiting the Gemfields / Gemfest	14.7%
National Parks / Carnarvon / Blackdown / Minerva Hills	11.3%
Clean / fresh air	10.9%
Fossicking / natural fossicking	9.5%
Scenery / countryside / sightseeing / walks / views	8.3%
Lake Maraboon / Red Claw / Fairbairn Dam / Bedford Weir	6.1%
Peace / quiet / relaxing / no traffic	5.8%
Other	5.6%
Everything / diversity of things to do / attractions / activities	4.2%
Unspoilt nature / bush / bushland / natural environment / bushwalking	3.6%
The place / van park / camping area we stayed at	3.5%
Bird life / birds	2.0%
Blackwater International Coal Centre / mine visit / coal mine tours	2.0%
Meeting other travellers / making new friends / meeting new people	1.6%
Self drive tours / driving / driving or passing through the area	1.0%
Central Highlands VIC / information provided at VIC	1.0%
Gardens / Botanical Gardens	0.8%
Free camping areas	0.8%
Lifestyle / outback atmosphere / atmosphere general / local atmosphere	0.7%
Seeing agriculture / different industries / diverse livelihoods	0.6%
Other	1.4%

3.3.13 What visitors were not happy with

Many (21.6%) visitors were happy with their visit. The main features of the visit to the Central Highlands visitors were not happy with included:

- Expensive shopping in town / food / coffee / liquor
- State of roads / broken edges / dangerous shoulders
- Availability / variety of good food / meals

Table 50 What visitors were not happy about during their Central Highlands visit

Unhappy about	% of visitors
Expensive shopping in town / food / coffee / liquor	19.5%
Nothing / none / mostly happy	19.5%
Availability / variety of good food / meals	12.8%
State of roads / broken edges / dangerous shoulders	10.0%
Rest stops / lack of toilets / rubbish bins on main roads / highways	3.9%
High price /fees / cost of / poor value of caravan parks	2.2%
Other	2.0%
Unhappy / unfriendly / poor attitude of staff / service in general	1.2%
Standard of accommodation at caravan parks / hotels / units	0.9%
Road / directional / distance signage	0.9%
Availability of fuel / lack of signage relating to fuel availability / types of fuel available	0.9%
TV / phone reception / internet availability	0.6%
Not enough free camping / Lack of dump sites	0.4%
Not enough / no access / no money at / unreasonable withdrawal limits on ATM	0.4%
Lack of availability of accommodation (caravan parks)	0.4%
Disappointing experiences /lack of bird life/fauna / fossicking / fishing	0.4%
Shop / service station / VIC opening hours	0.3%
Lack of craft / souvenirs / gifts	0.3%
Lack of shops / no big stores (Big W, Kmart, etc)	0.3%
Information on fossicking / lack of fossicking gear / areas for fossicking	0.3%
Lack of interpretive information / walking track maps at Carnarvon National Park	0.2%
Lack of information / knowledge of visitor services / trip planning / attractions	0.1%
Other	2.4%

3.3.14 Suggested improvements facilities visitors would like to see

The improvements suggested by the largest proportion of visitors involve better rest areas, roads tourist drives and emptying rubbish bins (Table 51).

Table 51 Improvements suggested by visitors

Suggested improvements	% of visitors
More/cleaner/better equipped (incl toilets) Rest stops/areas off-highway between towns	13.1%
Better roads/graded roads/sealed roads	11.8%
More tourist drives	9.0%
More frequent emptying of rubbish bins during peak visitor season / rubbish bins	7.2%
Nothing / NA	3.7%
More free camping areas/ standard/price levels of caravan parks/toilets/showers/dump points	3.5%
More / better availability (weekends) of food outlets / takeaway /dining options	2.8%
More information on visitor services at VICs/town maps,bank locations,attractions,fuel availability	2.5%
Other	2.4%
Road / highway directional signage	2.1%
Better /sealed road into Carnarvon National Park	1.5%
TV / wireless / internet / mobile phone reception	1.5%
Cleaner / better / more public toilets	1.4%
More / better parking areas/spaces for caravan parks/motorhomes in towns/shopping centres	1.3%
More / better amenities / standard of facilities at caravan parks / hotels / motels	1.0%
More fossicking areas	1.0%
More shops / better shop opening hours	0.8%
improved wheelchair / disabled access at attractions / parking	0.5%
More professional / friendly attitude to visitors	0.4%
Information / interpretive displays at Gemfields / fossicking guide	0.4%
Improved standard of accommodation / hotels / motels	0.3%
Amenities / toilets in National Parks	0.2%
Footpaths around smaller towns	0.2%

More specific improvements suggested include:

- $1 showers for travellers in the Botanical block.
- A centralised dump point in Blackwater or close by
- A fairly consolidated list of attractions with a very brief description of what one would expect to see and cost. Longreach Info Centre had similar and it was most beneficial
- A swimming pool at Takkaraka
- An Artesian hot pool
- An extra toilet between the Moss Garden and the Big Bend in Carnarvon Nat. Park
- Attractive prices for package tours
- Better signs prior to turn offs
- Capella museum open everyday
- Caravan Park facilities at Blackwater
- Cater for people with dietary needs (Wheat free etc)
- Chemist shop at Rubyvale or Sapphire. Bus tour around Rubyvale/Sapphire. Good take away food shop.
- Disabled parking at front entrance at Gemfest/Agfest

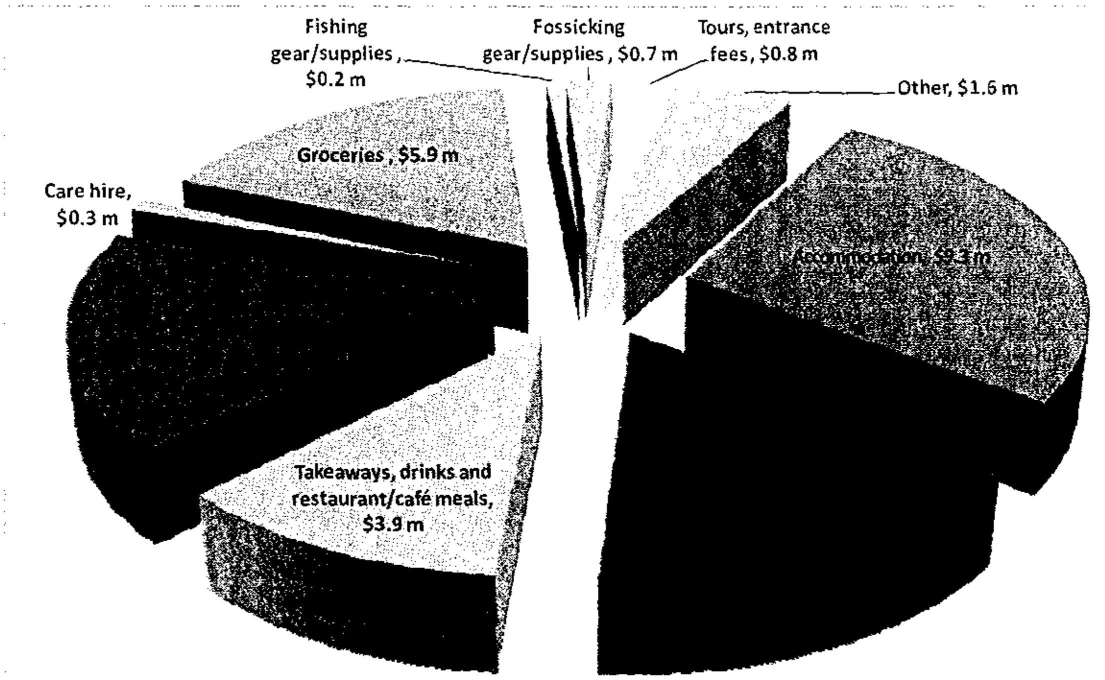
- Dump point for RV toilets in Rubyvale
- Elevated lookout to Peak Range near Capella
- Facilities at Mt Surprise
- Farmers markets
- Improve Boating supplies
- Improved services and facilities at Rolleston. Greater Indigenous cultural information.
- Like to see residents of Gem Fields allowed to build underground like Lightning Ridge & Solve the Litter/Fire problems by having a refund like South Australia
- Limits (enforced) on collection / crabbing for Red Claw
- Little café/bakeries in smaller towns
- More antique/collectable shops & markets with aboriginal art & internet cafes
- More brochures and printed maps of the walk in Carnarvon Gorge
- More cabin accommodation
- More detailed explanation of plants, etc., on self guided walk brochure and a shop café at the Gardens
- More fossicking areas with camping
- More info on the rail haulage of the coal
- More nightlife
- More street names on intersections
- More/better passing lanes
- Pets allowed at Lake/Campsites on leash
- Playground at Caravan Park
- Reticulated water at Willows
- Shade and tables/chairs at rest stops
- Shopping open on Sunday
- Signage to Lake Maraboon from North poor
- Signs advising where fuel is available after hours or through the night
- The mosaic pathway is great, but needs repairs
- Toilets along Carnarvon Gorge
- Waste bins need mesh tops to stop birds from removing waste
- Would any local people be equipped to offer star gazing/astronomy evenings?

3.3.15 VISITOR EXPENDITURE IN THE CENTRAL HIGHLANDS

The following tables provide a summary of expenditure in the Central Highlands region by holiday leisure visitors.

Holiday leisure visitors to the Central Highlands spent a total of $34.3 million in the year ending 30 June 2009, or an average of $45.70 per person per night.

Figure 16 Expenditure in the Central Highlands region by holiday leisure visitors



Approximately $9.3 million was spent on accommodation, followed by $6.1 million on fuel, $5.9 million on groceries, $5.5 million on shopping and gifts, and $3.9 million on takeaway food, drinks and meals.

Most of the expenditure ($17.6 million) was spent by visitors staying in caravans, followed by $8.3 million by visitors staying in hotels and motels, and $7.8 million by visitors staying with friends or relatives (Table 39).

Table 52 Total expenditure by items and accommodation type, holiday leisure visitors

$ millions	Accommodation type						
Expenditure item	Hotel/ motel / resort	Caravan park camping ground	Friends or relatives property	Rented house / apartment / unit / flat	Own property	Other	Total
Accommodation	$3.78	$5.16	$0.27	$0.04	$0.01	$0.00	$9.27
Pleasure shopping, gifts, souvenirs	$1.09	$2.15	$2.19	$0.01	$0.02	$0.01	$5.47
Takeaways, drinks /café meals	$1.28	$1.27	$1.27	$0.01	$0.03	$0.02	$3.38
Fuel	$0.94	$3.68	$1.37	$0.00	$0.05	$0.02	$6.05
Care hire	$0.22	$0.06	$0.02	$0.04	$0.00	$0.00	$0.34
Groceries	$0.34	$3.54	$1.81	$0.00	$0.10	$0.12	$5.91
Fishing gear/supplies	$0.01	$0.19	$0.01	$0.00	$0.00	$0.00	$0.20
Fossicking gear/supplies	$0.06	$0.53	$0.03	$0.00	$0.09	$0.01	$0.72
Tours, entrance fees	$0.23	$0.34	$0.26	$0.00	$0.00	$0.01	$0.85
Other	$0.37	$0.68	$0.54	$0.00	$0.02	$0.00	$1.62
Total	$8.33	$17.61	$7.76	$0.09	$0.33	$0.19	$34.31

Visitors staying in hotels or motels had the highest average expenditure per visitor night of $144.40, approximately 3.2 times that of the predominant holiday leisure segment staying in a caravan. However, visitors staying in a caravan (5.2 nights) stay 2.4 times longer than visitors in a hotel or motel (2.2 nights), making expenditure by visitors staying in a caravan more significant for the region in absolute terms.

Table 53 Average expenditure per visitor night by expenditure item and accommodation used by holiday leisure visitors

$ per visitor night	Accommodation type						
Expenditure item	Hotel/ motel / resort	Caravan park camping ground	Friends or relatives property	Rented house / apartment / unit / flat	Own property	Other	Total
Accommodation	$65.60	$13.20	$1.00	$27.50	$0.80	$0.00	$12.40
Pleasure shopping, gifts, souvenirs	$18.90	$5.50	$7.90	$7.20	$1.20	$1.70	$7.30
Takeaways, drinks and café meals	$22.10	$3.20	$4.60	$5.70	$2.00	$3.70	$5.20
Fuel	$16.30	$9.40	$4.90	$1.70	$2.70	$2.80	$8.10
Care hire	$3.90	$0.20	$0.10	$28.70	$0.30	$0.00	$0.50
Groceries	$6.00	$9.00	$6.50	$2.40	$5.90	$22.10	$7.90
Fishing gear/supplies	$0.10	$0.50	$0.00	$0.00	$0.00	$0.00	$0.30
Fossicking gear/supplies	$1.00	$1.40	$0.10	$0.00	$5.60	$1.40	$1.00
Tours, entrance fees	$4.00	$0.90	$0.90	$0.50	$0.10	$2.10	$1.10
Other	$6.50	$1.70	$1.90	$0.00	$1.40	$0.10	$2.20
Average	$144.40	$45.00	$27.90	$73.60	$20.10	$33.90	$45.70

The following tables show expenditure by holiday leisure visitors, plus expenditure by business travellers and resident daytrippers.

For year end June 2009, visitors spent $94.92 million in the Central Highlands region - $34.3 million by holiday leisure travellers, $42,1 million by business travellers, and $18.5 million by resident daytrippers.

While business travellers account for one third of visitor nights, they spend almost two and one half times ($111.48) as much per visitor night as holiday leisure travellers ($45.75), and account for 44.5 per cent of total expenditure in the Central Highlands region. While business travellers spend more per night on travel related items (accommodation, food, car hire, etc.) they spend considerably less on recreational items such as fishing and fossicking gear and supplies, tours, entrance fees, etc. (Table 54 and Table 55).

Table 54 Total expenditure by item and accommodation used – all visitors

$ millions	Purpose				
Expenditure item	**Holiday/ leisure/ other**	**Business**	**Overnight visitor total**	**Daytrippers**	**Total Tourism**
Accommodation	$9.27	$23.12	**$32.39**	$0.00	**$32.39**
Pleasure shopping, gifts, souvenirs	$5.47	$2.56	**$8.03**	$5.09	**$13.12**
Takeaways, drinks and /café meals	$3.88	$4.80	**$8.68**	$3.48	**$12.17**
Fuel	$6.05	$4.86	**$10.91**	$5.53	**$16.44**
Care hire	$0.34	$2.25	**$2.59**	$0.00	**$2.59**
Groceries	$5.91	$4.28	**$10.19**	$0.76	**$10.95**
Fishing gear/supplies	$0.20	$0.04	**$0.25**	$0.71	**$0.95**
Fossicking gear/supplies	$0.72	$0.02	**$0.74**	$0.09	**$0.83**
Tours, entrance fees	$0.85	$0.13	**$0.97**	$1.15	**$2.13**
Other	$1.62	$0.04	**$1.65**	$1.70	**$3.36**
Total	$34.31	$42.10	**$76.41**	$18.51	**$94.92**

Table 55 Average expenditure per visitor night by item and accommodation used – all visitors

$ per visitor night/daytrip	Purpose				
Expenditure item	**Holiday/ leisure/ other**	**Business**	**Overnight visitor total**	**Daytrippers**	**Total Tourism**
Accommodation	$12.36	$61.22	**$28.72**	$0.00	**$22.43**
Pleasure shopping, gifts, souvenirs	$7.29	$6.78	**$7.12**	$16.09	**$9.09**
Takeaways, drinks and café meals	$5.17	$12.72	**$7.70**	$11.01	**$8.43**
Fuel	$8.07	$12.87	**$9.68**	$17.48	**$11.39**
Care hire	$0.46	$5.95	**$2.30**	$0.00	**$1.79**
Groceries	$7.89	$11.33	**$9.04**	$2.39	**$7.58**
Fishing gear/supplies	$0.27	$0.11	**$0.22**	$2.23	**$0.66**
Fossicking gear/supplies	$0.96	$0.06	**$0.66**	$0.29	**$0.57**
Tours, entrance fees	$1.13	$0.34	**$0.86**	$3.64	**$1.47**
Other	$2.15	$0.10	**$1.46**	$5.39	**$2.32**
Total	*$45.75*	*$111.48*	***$67.76***	*$58.53*	***$65.74***
Visitor nights/daytrips	750,048	377,626	1,127,674	316,306	1,443,980

4 VALUE OF TOURISM TO THE REGIONAL ECONOMY

4.1 INTRODUCTION

Previous sections of the report quantify the size and characteristics of visitation of the Central Highlands region. Estimates of the value of tourism to the Central Highlands economy presented in this report are based on the methodology outlined in Section 5.6, using published and unpublished data from organisations such as the Australian Bureau of Statistics and Tourism Research Australia, along with survey results derived from a sample survey of 289 Central Highland residents, a survey of 70 accommodation operators, and survey of 644 visitors at various locations throughout the Central Highlands.

The modelling and estimation of impacts is largely consistent with the approach adopted by the ABS in their Tourism Satellite Accounts and Queensland Office of Economic and Statistical Research in their Contribution of International and Domestic Visitor Expenditure to the Queensland Economy: 2003-04.

The estimates in this report provide a firm indication of the economic impact of tourism to the Central Highlands region. However, the nature of this study is such that the reliability of the estimates is influenced largely by the nature of the data used and methodology adopted, and this should be taken into account when using the results.

In year end June 2009 the Central Highlands hosted 326,229 visitors, 1.128 million visitor nights and 316,306 resident daytrips. These figures do not include the number of domestic and international visitors who stop in the region, but not overnight - for example, a visitor travelling from Barcaldine to Rockhampton who stops in Emerald for morning tea or lunch. The figures do include visitors travelling on business as well as visitors combining a holiday with short term seasonal work (such as backpackers).

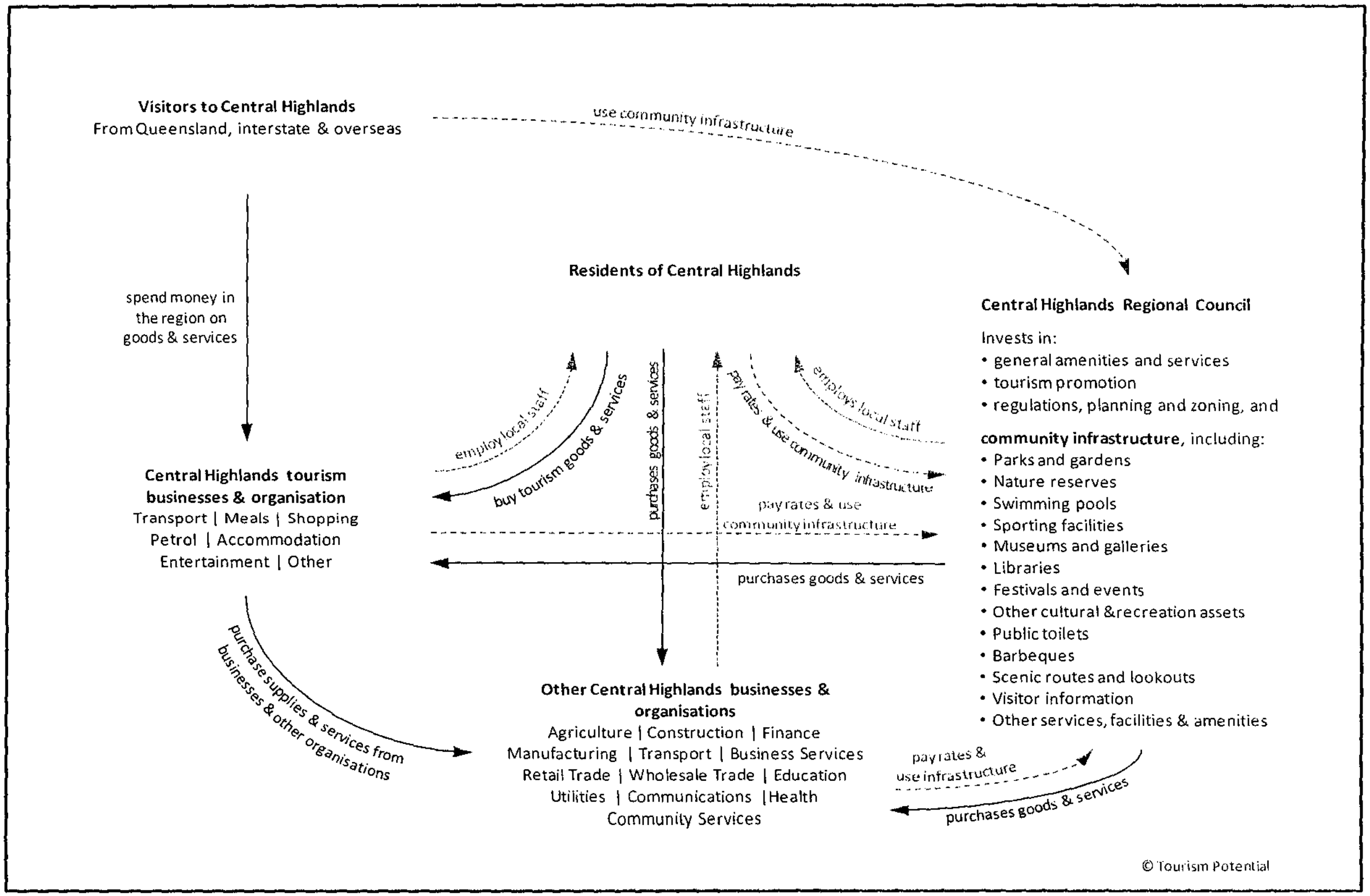
4.2 TOURISM AND THE CENTRAL HIGHLANDS ECONOMY

Tourism is not identified as a conventional industry or product in international statistical standards since tourism is defined by what the visitor purchases or uses, rather than what the supplier produces. The tourism satellite account approach has been adopted in Australia by the ABS to enable the economic aspects of tourism to be drawn out and analysed separately within the structure of other industries and the economy generally (see Section 5.6 for further discussion on this approach).

Since this approach focuses on spending by visitors, it is possible for many conventional industries to make a contribution to tourism. To avoid an overstatement of the impact of tourism, only that share of economic activity arising from expenditure by visitors and their use of facilities in the region is measured.

The following figure illustrates the linkages between visitors and organisations providing goods and services to visitors (including Council).

Figure 17 Key tourism linkages in the Central Highlands regional economy

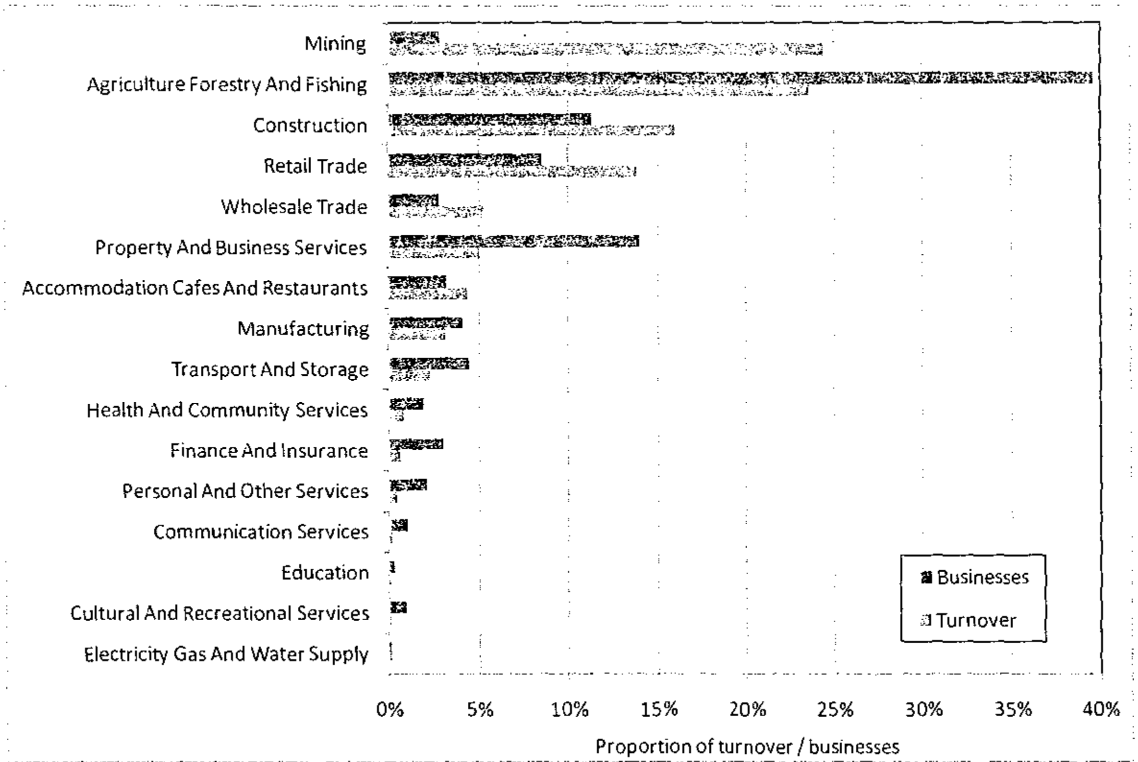


From ABS Business Register data, a total of 2,991 business entities[5] were registered in the region in June 2007, generating approximately $2.941 billion in turnover[6].

While regional data are not available, research by Tourism Research Australia (TRA) indicates that there were 390 tourism businesses[7] in the Emerald statistical local area in 2007. Most (156) were non-employing businesses (owner-operated), 117 were micro businesses (1-4 employees), 75 were small businesses (5-19 employees) and 42 were medium to large businesses (20 or more employees). According to TRA, approximately one quarter (25.7%) of businesses in Emerald rely on visitors for a significant proportion of their turnover. Note that some of these businesses may sell the majority of their goods and services to residents, and a smaller proportion to visitors. While one quarter of all businesses in Emerald provide some level of goods and services to visitors, the level of net economic activity generated by tourism will be less than this (and is quantified later in the report).

While tourism is a significant industry in the Central Highlands, the Agriculture, Forestry and Fishing industry is the largest in terms of number of businesses (almost 40% of all businesses), and mining industry the largest in terms of turnover[8] (Figure 18 below).

Figure 18 Proportion of businesses by industry, Central Highlands, June 2007



Source: ABS, 8165.0, Counts of Australian Businesses.

5 Entities registered for an ABN and remitting GST. Excludes government agencies, nonprofit organisations, associations, etc.

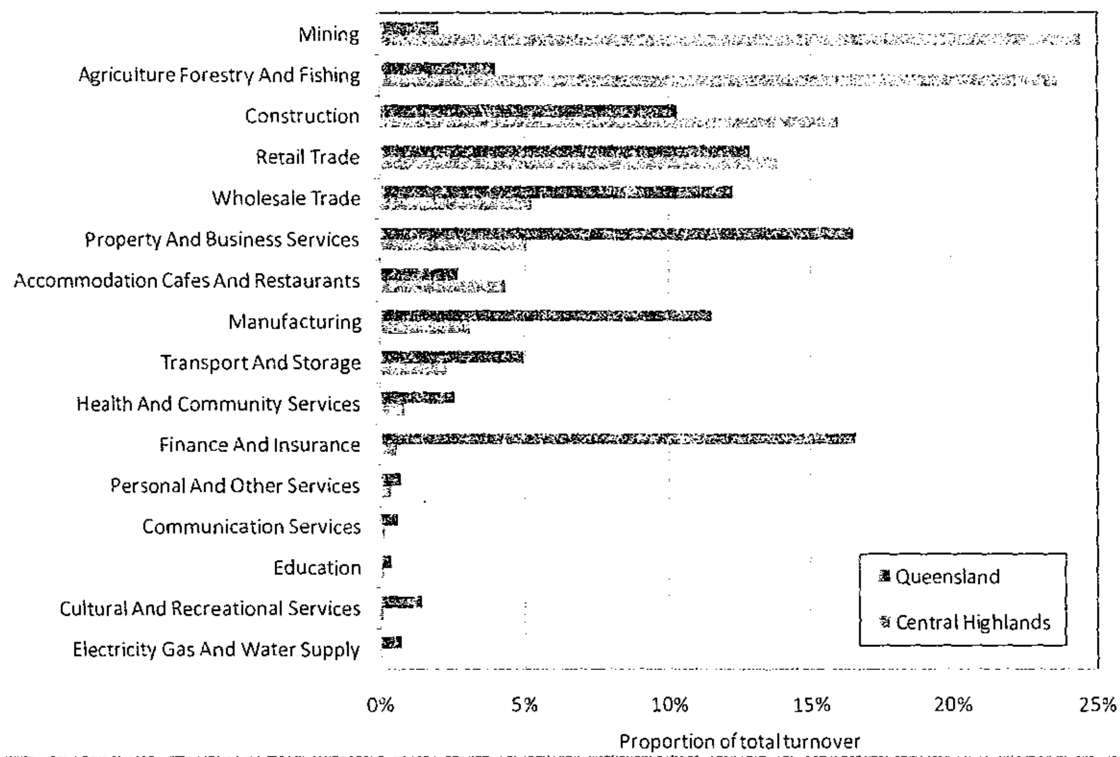
6 Note that the value of turnover includes considerable double counting of economic activity as firms within the region buy and sell goods and services to other firms in the region.

7 Broadly defined as any business selling a significant proportion of their goods and services to visitors.

8 Theses data may understate the size of mining industry turnover, due to the scales by which the data are reported.

Figure 3 shows the distribution of businesses by industry in the Central Highlands Region and Queensland. Of the 16 conventional industries reported, the Mining, Agriculture, Construction, Retail Trade, and Accommodation, Cafes and Restaurant industries exceeded the state average in the Central Highlands region – an indication of the relative significance of these industries in the region.

Figure 19 Proportion of turnover, by industry, Central Highlands and Queensland, 2006/07



Source: ABS, 8165.0, Counts of Australian Businesses.

4.3 CENTRAL HIGHLANDS REGION VISITOR NIGHTS AND EXPENDITURE

In year end June 2009 there were 326,229 visitors and 316,306 resident daytrippers in the Central Highlands region , who spent a total of $94.92 million in the region. In addition is a further $1.2 million imputed to represent the value of rents on holiday homes in the region.

Most of this expenditure was 'new money' into the region, i.e., expenditure by people not resident in the Central Highlands (Table 56).

Table 56 Central Highlands Region Visitor Nights and Expenditure

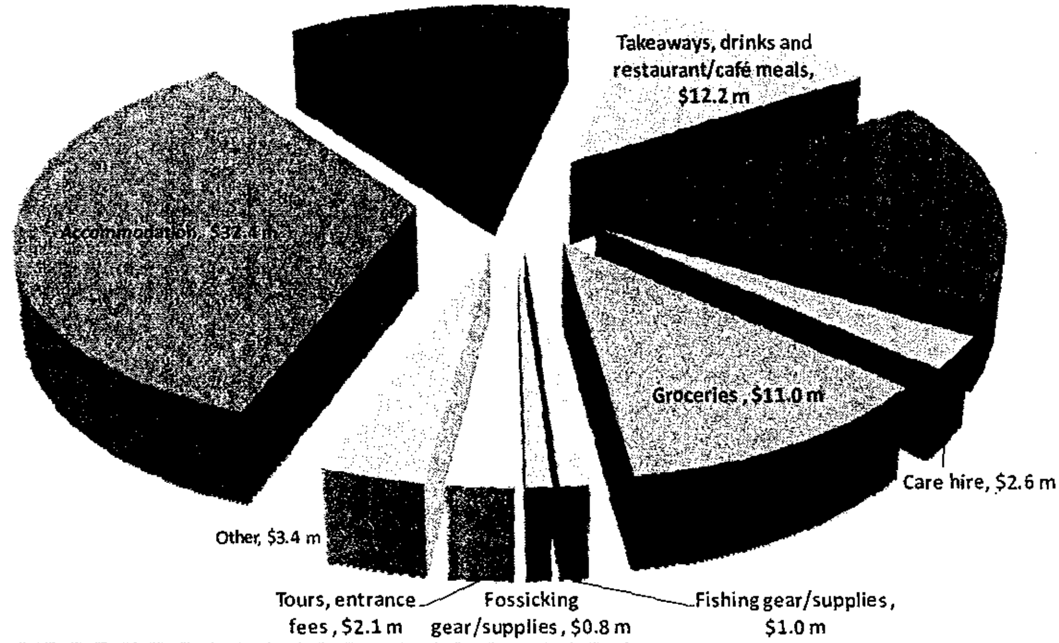
	Day	Overnight	Total
Visitor Days/Nights (000's)	316.3	1,127.7	1,444.0
Expenditure ($m)			
Visitor expenditure	18.51	76.41	94.92
Imputed expenditure	0	1.2	1.2
Total	18.51	77.61	96.12

Source: Tourism Potential

This expenditure averages at $65.71 per visitor day/night.

Ninety per cent of expenditure by visitors in the region was on accommodation, shopping, food and drink, fuel and groceries (Figure 20).

Figure 20 Visitor expenditure by category



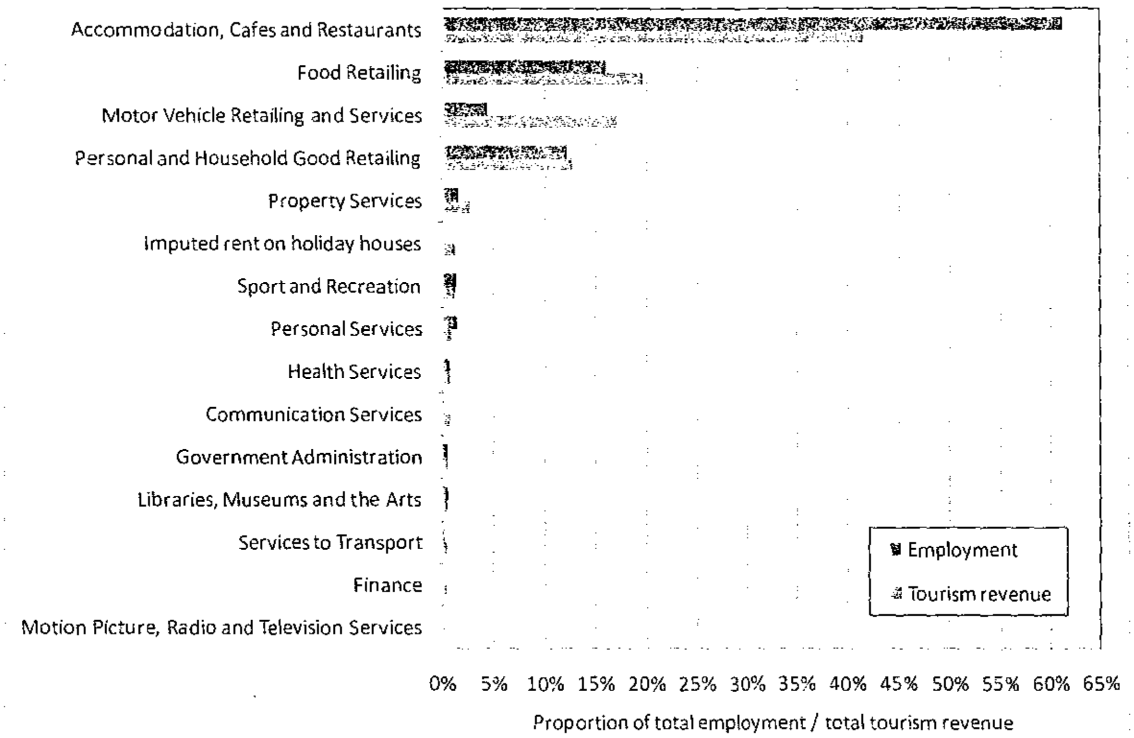
Source: Tourism Potential

The $96.12m in expenditure by visitors corresponds approximately to the revenue received by businesses and other organisations in the region in 2008/09. Using the tourism satellite accounts approach it is estimated that these organisations in the Central Highlands:

- made purchases of $65.8 million
- paid wages and salaries of $16.1 million
- had other expenditure of $6.7 million
- realised operating surpluses totalling $7.5 million
- employed the full time equivalent of 517 people (687 persons in total)

Figure 21 following illustrates the distribution of tourism revenue and employment by conventional industries in the Central Highlands region supplying goods and services to visitors. The industries benefiting most from initial expenditure by visitors are the accommodation, café and restaurant; motor vehicle retailing and services; food retailing; and personal and household good retailing industries.

Figure 21 Central Highlands direct tourism revenue and employment distribution by industry



Source: Tourism Potential

Figure 21 illustrates that the majority of industries benefiting from visitor expenditure in the Central Highlands are those not commonly identified as tourism businesses – i.e., over half (almost 60%) of expenditure is in industries other than accommodation, cafes and restaurants.

4.4 Economic impact of tourism to the Central Highlands region

4.4.1 Value added

The initial, gross expenditure effects are not always the best indicator of economic value. It includes total expenditure by all industries including imports. An alternative measure of the economic effect of tourism in the Central Highlands is the impact on industry value added or gross regional product. Value added is the contribution to gross regional product, or net output (which is the gross value of goods and services purchased less intermediate inputs and imports). Value added excludes the double counting associated with gross output estimates and represents the value added to products and services that firms in the region produce (see Section 5.6 for further explanation of the economic impact methodology and definitions).

Tourism activity generated total value added of $57.0m to the Central Highlands Region in 2008/09 (Table 57).

Every $1 million spent by visitors in the Central Highlands contributes $593,000 in value added to the regional economy.

Table 57 Tourism value added

	$m	% of Total
Initial Level	$30.1	53%
Flow-on	$26.9	47%
Total	$57.0	100%
Impact Multiplier	1.89	

The main beneficiaries of the $26.9m in flow-on value added generated by the tourism industry are the agriculture (20%), property and business services (15%), and retail trade (9%) industry sectors.

Table 58 Initial and flow-on tourism value added by sector

Industry Sector	$m	% of total	% of flow-on
Tourism	$30.10	53%	
Agriculture	$5.31	9%	20%
Property & business services	$4.12	7%	15%
Ownership of dwellings	$4.06	7%	15%
Retail trade	$2.54	4%	9%
Coal mining	$2.30	4%	9%
Other mining	$1.13	2%	4%
Wholesale trade	$0.81	1%	3%
Finance & insurance services	$0.77	1%	3%
Transport & storage	$0.75	1%	3%
Health & social services	$0.66	1%	2%
Other services	$0.63	1%	2%
Construction	$0.59	1%	2%
Hospitality services	$0.53	1%	2%
Other sectors	$2.73	5%	10%
Total	$57.03	100%	100%

4.4.2 Wages & Salaries

The impact of tourism in the Central Highlands Region can also be measured in terms of household income (i.e., wages and salaries earned in the Central Highlands Region).

Total (initial and flow-on) wages and salaries associated with tourism activity are estimated at $25.9m for the Central Highlands Region (Table 59).

Table 59 Household incomes generated by tourism

	$m	% of Total
Initial Level	$16.1	62%
Flow-on	$9.8	38%
Total	$25.9	100%
Impact Multiplier	1.61	

The main beneficiaries of flow-on wages and salaries paid to other industries by the tourism industry include property and business services (23%) and the retail trade (15%) sectors of the regional economy.

4.4.3 Employment

Tourism activity in the Central Highlands Region generated 517 full time equivalent jobs directly, plus a further 263 full time equivalent jobs generated indirectly in other industries (780 full time equivalent jobs in total) in 2008/09.

Every $1 million spent by visitors in the Central Highlands generates or sustains employment of 8.1 persons in full time equivalent terms, in the region.

Table 60 Tourism employment

	FTE's	% of Total
Initial Level	517	66%
Flow-on	263	34%
Total	780	100%
Impact Multiplier	1.51	

The agriculture and retail trade industry sectors are the largest beneficiaries of tourism activity flow-on employment, accounting for 30% and 23% respectively of total flow-on employment generated by the tourism industry (Table 61).

Table 61 Initial and flow-on employment by sector

Industry Sector	FTE's	% of total	% of flow-on
Tourism	517	66%	
Agriculture	78	10%	30%
Retail trade	59	8%	23%
Property & business services	28	4%	11%
Hospitality services	13	2%	5%
Other services	11	1%	4%
Health & social services	8	1%	3%
Construction	7	1%	3%
Transport & storage	7	1%	3%
Food manufacturing	6	1%	2%
Education services	6	1%	2%
Utilities	6	1%	2%
Wholesale trade	5	1%	2%
Coal mining	5	1%	2%
Other sectors	23	3%	9%
Total	780	100%	100%

4.4.4 Summary of impacts

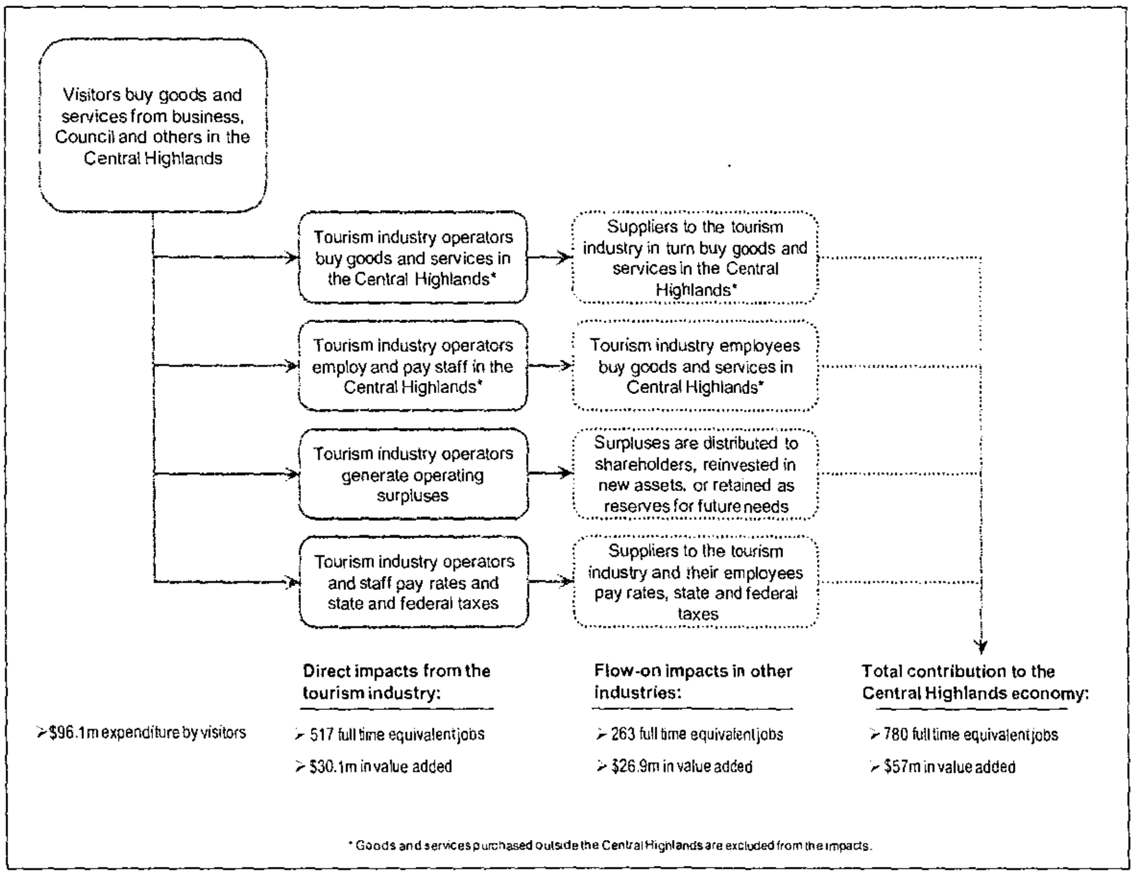
In 2008/09, tourism generated $57.0 million in value added in the Central Highlands regional economy and employment for the full time equivalent of 780 people.

Impact	Initial	Flow-on	Total
Visitor expenditure ($m)	$96.1		
Value added ($m)	$30.1	$26.9	$57.0
Wages and salaries ($m)	$16.1	$9.8	$25.9
Employment (FTE's)	517	263	780

Source: Tourism Potential and Applied Economic Research

The effects at each impact stage are illustrated in Figure 22.

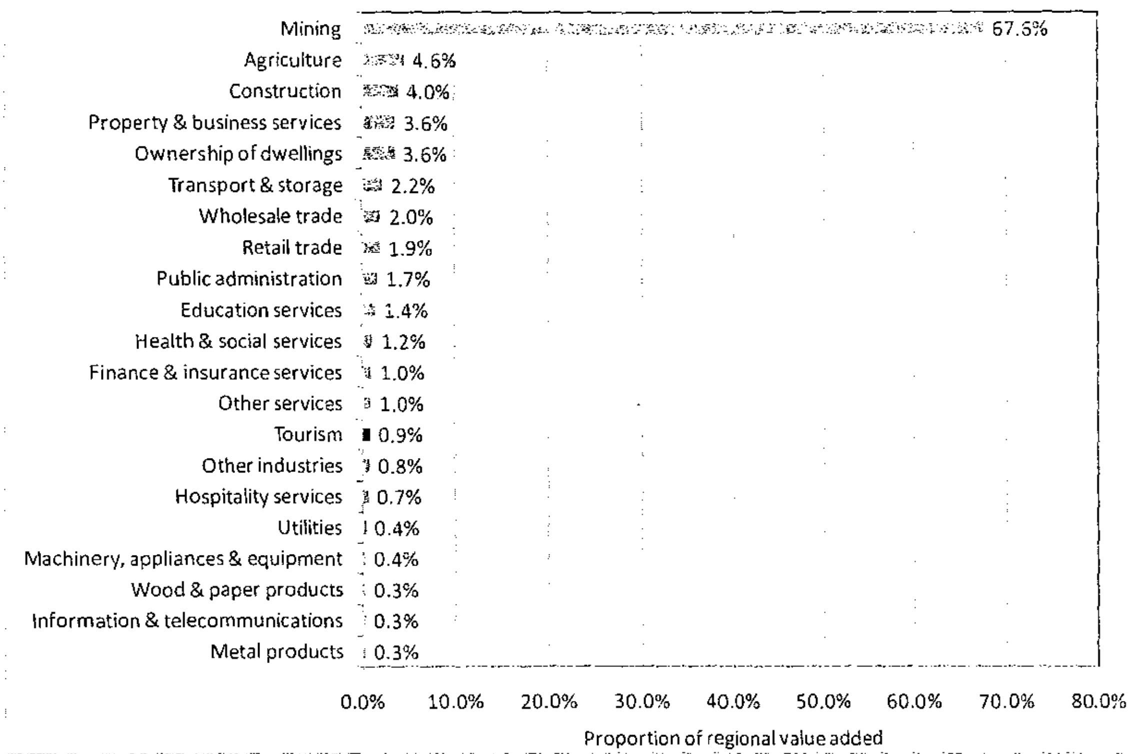
Figure 22 Summary of Impacts



4.5 Significance of the tourism industry to the Central Highlands

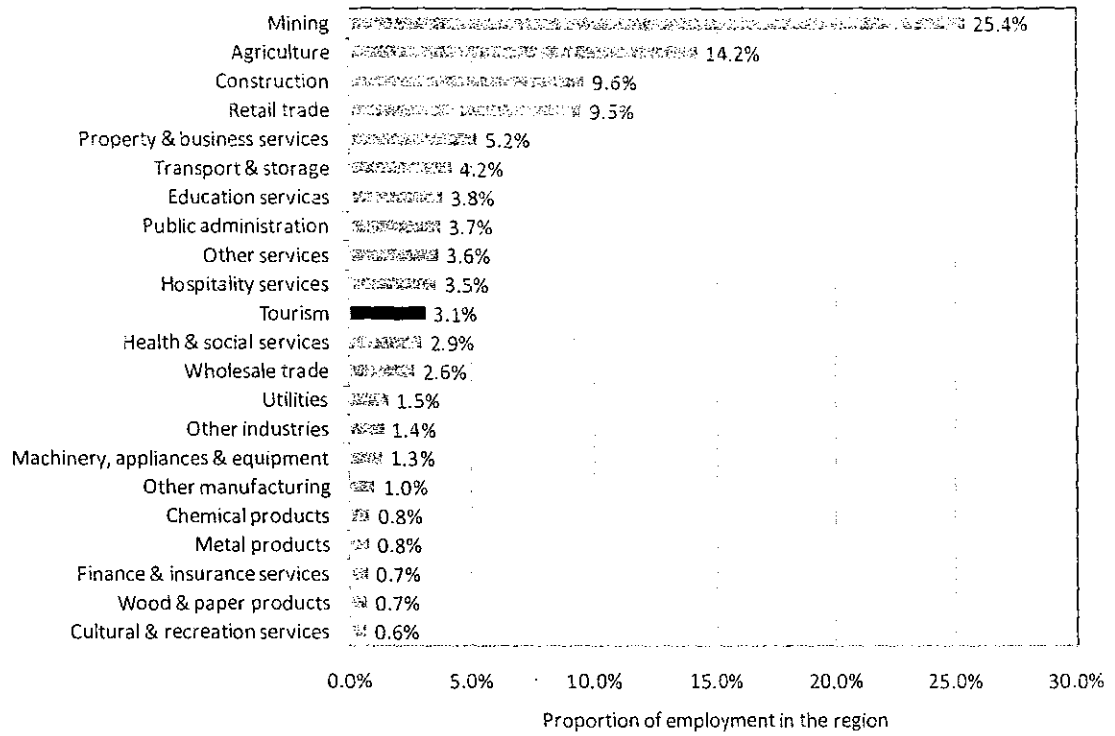
Some studies measure the contribution of tourism in terms of its initial or direct impact on the economy, that is, just those impacts associated with the direct exchange between visitors and producers of tourism goods or services. In the Central Highlands, the initial tourism value added ($30.1m) and employment (517 FTE's) represent 0.9 per cent and 3.1 per cent respectively of gross regional product and employment in the Central Highlands region. These proportions are lower than those at a national level (direct tourism expenditure accounted for 3.6 per cent of GDP and 4.7 per cent of employment in Australia in 2007/08). However, leaving aside the enormous scale of the mining industry from the contribution to regional value added and employment, tourism's contribution is more in line with the national average (2.6% and 4.1% respectively).

Figure 23 Contribution to regional value added by the tourism industry in the Central Highlands Region compared to other industries (direct effects only)



Source: Tourism Potential and Applied Economic Research

Figure 24 Contribution to employment in the Central Highlands generated by the Tourism Industry compared to other industries (direct effects only)



Source: Tourism Potential and Applied Economic Research

The above figures measure the value of tourism at the 'point of sale' only rather than the total effective contribution tourism makes to the Central Highlands economy[9], and therefore, understate the total value of tourism to the region. Tourism's contribution to the regional economy extends beyond the sale between tourism operator and visitor, and includes the effects of changes in incomes generated in other industries associated with products or services sold to visitors (since tourism generates income for a wide range of industries many of which are not directly connected with tourism).

For example, in addition to the effects from the final sale of a motel room and breakfast package to visitors are the impacts associated with the upstream components in the supply chain within the accommodation sector which ultimately are attributed to visitors. These include food purchased by the accommodation operator for sale to visitors, raw materials purchased by the food manufacturer to produce the food sold to the accommodation operator, and so on. Part of the indirect component of tourism product sold to visitors includes agricultural products and products from virtually every sector of the Central Highlands economy.

9 The ABS notes in their Tourism Satellite Accounts publication that these direct impacts do not include the downstream effects of tourism demand, and when measuring the indirect effects, "account should also be taken of changes in incomes which may feed through to further changes in tourism demand".

5 Study and Survey Methodology

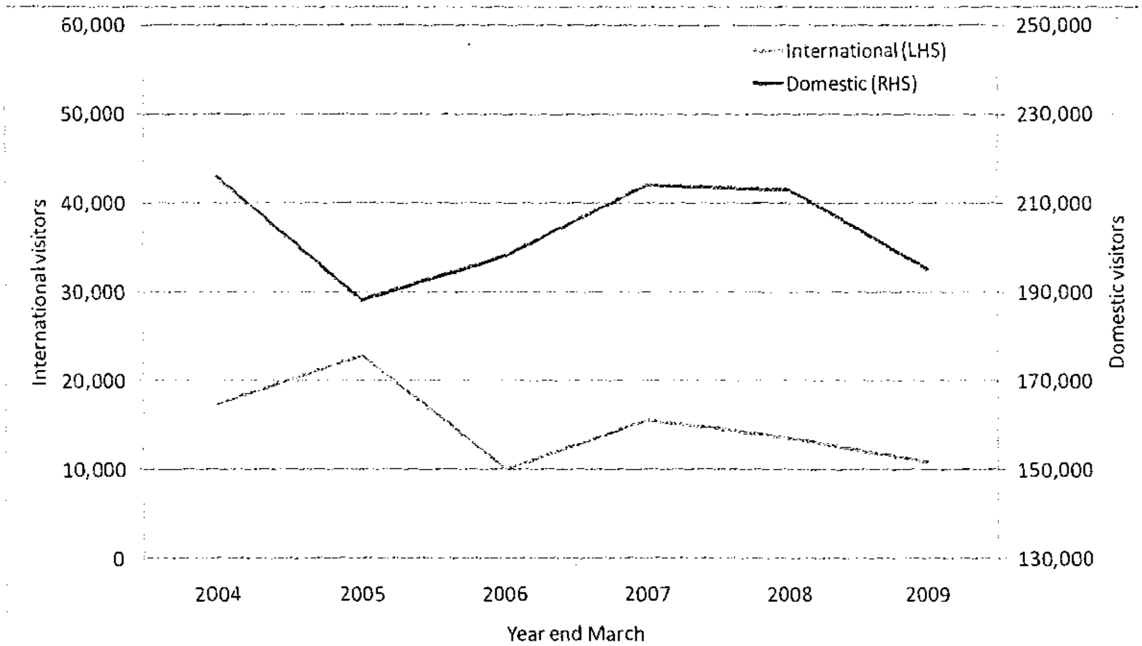
5.1 Introduction

It is essential to have basic data to determine the nature and value of tourism in the region from which an assessment of tourism potential can be made.

There are several existing sources of tourism data, including the National Visitor Survey (NVS) and International Visitor Survey (IVS), conducted by Tourism Research Australia on behalf of the State and Federal governments, however, these are national surveys and the sample of visitors interviewed in the Central Highlands region is generally too small to provide reliable estimates.

For example, data from the NVS and IVS shown in Figure 25 below provides some indication of the level of tourism activity, with visitor numbers to the Central Highlands ranging from 205,000 to 235,000 per year. However, the year on year variations are more likely due to sample variation than market fluctuations.

Figure 25 Domestic and international visitors to the Central Highlands region



Source: NVS and IVS

There is also the Australian Bureau of Statistics' Survey of Tourist Accommodation, which provides reasonably reliably data on the supply and demand of accommodation, but not on overall visitor activity and expenditure, and data are not published for all four statistical local areas in the region (the ABS published data for the Central Highlands region for the first time in March quarter 2009). Finally, there have been several snapshot visitor surveys done in the region, however, these are now dated (2003), and did not collect visitor expenditure data.

A basic need therefore, is for reasonably reliable data on the size and nature of tourism at the local level. There are three types of visitors captured in the benchmarking program:

- Visitors staying in commercial or paid accommodation (hotels, motels, caravan parks, etc.),
- Visitors staying with friends or relatives in the region, and
- Daytrippers – generally residents of the region who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel,

5.2 Survey of commercial accommodation operators

To capture information on the number of visitors staying in commercial accommodation, a database was developed of all main commercial visitor accommodation providers in the region. A range of sources were canvassed including the Capricorn Tourism website and membership list, Central Highlands visitor website, RACQ, AAA Tourism, and Yellow Pages.

A simple questionnaire modelled on the Australian Bureau of Statistic's quarterly Survey or Tourist Accommodation survey form was prepared and approved by the ABS Survey Clearing House. A covering letter signed by Council's Mayor and Chairman of Capricorn Tourism was also prepared, along with a letter of instruction from Tourism Potential and EC3 Global. The letters of introduction and survey form were sent to operators in early July. A copy of these documents is included as Attachments 3, 4 and 5.

A series of follow-up calls and emails was made over a period of five weeks to encourage participation. Table 63 below shows the number of properties surveyed and response rate achieved.

Table 62 Number of properties surveyed and response achieved

	By number of establishments			By number of rooms/sites		
	Non-response	Respondents	Response rate	Non-response	Respondents	Response rate
Hotels/Motels	27	24	47%	414	908	69%
Caravan parks	6	12	67%	183	875	83%
Total / average	33	36	52%	597	1,783	75%

Four properties which were initially included in the sample frame, were subsequently withdrawn from the survey program, due to an inability to contact the property, their being only recently opened, or that provided accommodation to mining staff and contract workers that is more accurately classified as residential rather than visitor accommodation.

Results from operators were benchmarked against the ABS Survey of Tourist Accommodation to the extent individual accommodation properties could be aligned with those in the ABS survey[10]. As a result, room supply and guest numbers for this and ABS survey compare closely. Section three of the report shows the results which are similar to the scope covered by the ABS survey, as well as those properties outside the ABS scope.

[10] The ABS keeps the names of properties included in their Survey of Tourist Accommodation confidential. However, based on the number and size of individual properties in various SLAs, we believe we have identified which properties are included in the ABS survey for the purpose of our benchmarking work.

5.3 VISITORS STAYING WITH FRIEND AND RELATIVES, AND DAY TRIPPERS

Visitors staying with friends and relatives are sometimes overlooked as a market, and often account for a substantial proportion of visitors to a region. To capture data about the number of visitors staying with friends and relatives, plus daytripping activity, a sample telephone survey of Central Highland residents was conducted in August of 496 Central Queensland householders. Questionnaires used are included as Attachment 6.The sample of households was drawn using Electronic White Pages Random Digit Dialling and reflects the distribution of the population in the region. Of the 496 households contacted, nineteen per cent refused to participate. Of the balance, most (289 or 58%) qualified for the full interview.

Table 63 Sample characteristics

	Count	% of total
Both took daytrips and had visitors	189	38%
Had visitors but took no daytrips	70	14%
Took daytrips but had no visitors	30	6%
Sub-total	289	58%
Did not take a daytrip or have visitors (not interviewed)	54	11%
Did not live in area (not interviewed)	57	11%
Refused	96	19%
Total approaches	496	100%

The distribution of the sample by statistical local area within the Central Highlands region is close to that of the estimated resident population and household distribution (Table 64), therefore, the results of the visiting friends and relatives sample survey are close to what we'd expect to find in the overall population. Data from the survey were weighted to reflect the distribution of households in the Central Highlands region by statistical local area.

Table 64 Sample and population distribution

		ABS data		VFR Survey
SLA	Area	Population	Households	Sample
Bauhinia	South	7.8%	8.9%	8.7%
Duaringa	East	22.7%	23.7%	36.0%
Emerald	Central & Gemfields	57.8%	56.6%	44.3%
Peak Downs	North	11.7%	10.8%	11.1%
Total	Central Highlands	100.0%	100.0%	100.0%

5.4 OTHER SOURCES OF ACCOMMODATION

In addition to the above types of accommodation, several other sources of visitor accommodation are included:

- Camp sites at Blackdown Tableland (16) and Carnarvon National Park (45),

- Council designated overnight camping reserve sites (Sapphire camping reserve and under the rail bridge and Vince Lester Bridge on the west bank of the Nogoa River – each with a capacity of approximately 20-30 vans/motorhomes),
- Emerald Showground reserve (approximate capacity of 5-10 vans/motorhomes),
- Improvised house/tent – occupied by short and long term stay visitors (approximately 230), and
- Houses/flats/units used by visitors only (approximately 715).

The first three categories are relatively self explanatory. The last two categories are drawn from the 2006 Census. Improvised houses/tents are private dwellings occupied by either residents or visitors. Approximately 80 per cent of these dwellings in the Emerald Statistical Local Area (the same as the former local government area) are located in the Gemfields. The presumption is that these dwellings are accommodations located on fossicking or mining leases and occupied by lease holders (not usual residents of the Gemfields) or visitors. There are relatively few of these types of dwellings in the Emerald, Peak Downs and Bauhinia areas.

Houses/flats/units are private dwellings classified in the 2006 Census as occupied by visitors only. These are private dwellings falling outside the ABS definition of short term visitor accommodation (non-private dwellings), but occupied by visitors.

Improvised houses/tents and houses/flats/units used by visitors only were not included in the project survey due to difficulties in identifying their location and occupants. For improvised houses/tents, assumptions were made about the level of use throughout the year, average length of stay and purpose of visit using various sources of published and unpublished information. Information from this segment is illustrative of the level of visitation rather than descriptive of the characteristics of demand. With houses/flats/units used by visitors only, although the occupants are visitors, it is presumed these dwelling are used more for medium to long term contractor or commercial/ industrial workers, than holiday/leisure travellers that can be stimulated by tourism marketing and development activities. It is worth noting that the 715 'visitor only' dwellings represent approximately 30 per cent of hotel, motel and caravan room/site stock in the Central Highlands.

5.5 Survey of holiday visitors to the Central Highlands

The visitor number benchmarking stage of the project assembled data and surveyed tourism operators and residents about guests and visitors staying with them. However, few operators collect extensive information on the characteristics of their guests on an ongoing basis. Where this is collected it is often confined to guest place of residence and occasionally, purpose of visit.

To learn more about the characteristics of people visiting the Central Highlands region, two surveys of visitors were conducted:

- A survey of visitors staying with friends and relatives, and daytripping activity, and
- A survey of visitors (primarily holiday leisure travellers) to the Central Highlands Region.

The methodology adopted for the first survey was summarised in Section 5.3.

The methodology adopted and sample obtained for the subsequent visitor survey are described below.

Various attributes of interest were identified and discussed with the project steering committee, recognising there is a limit as to the scope of information and time visitors are willing to provide in answering questions about their trip. The attributes selected were:

- Main purpose the trip to the Central Highlands
- Length of stay
- Previous and next stops outside the Central Highlands
- Information sources did you use when planning the visit
- Previous visits to the region
- Type of accommodation used
- Activities undertaken in the region
- Visits to towns or places in the Central Highlands
- Rating of services and facilities
- What visitors enjoyed most about their visit
- What visitors were not happy with
- Suggested improvements facilities visitors would you like to see
- Size and age of travel party
- Usual place of residence
- Expenditure in the Central Highlands

The questionnaire developed to canvas these attributes is included as Attachment 7.

In order to capture a cross-section of visitors to the region, a wide range of places was used to engage with visitors. Quotas by the region's main geographic areas were also applied to ensure adequate sample sizes in less visited areas – approximately 100 completed surveys in each of the Gemfields, Northern area, Emerald area, Lake Maraboon, the Southern area, and Eastern areas of the Central Highlands. 644 surveys were completed in total. Approximately half of the questionnaires were completed by face to face interviews, and half by self completion by visitors over a four month period from July to October[11]. Ten of the 644 questionnaires completed were discarded due to a key question being incomplete or ambiguous (length of stay, size of travel party).

The places surveyed and sample obtained from each area is summarised in Table 66.

[11] Surveying was conducted outside of school holiday periods. Surveying was conducted during Gemfest in early August, and 54 of the 152 surveys in the Gemfields region were completed during the event.

Table 65 Questionnaires completed by area

Area	Location	Questionnaires
Eastern	Bauhinia Service Station Blackdown Tableland National Park Blackwater International Coal Centre Duaringa Historical & Tourism Information Centre Bedford Weir Caravan Park	107
Northern	Capella Van Park Capella Pioneer Village Capella Store and Information Centre	50
Southern	Carnarvon National Park Carnarvon Wilderness Lodge Takarakka Bush Resort Injune Visitor Information Centre Rolleston Transaction Centre Springsure Visitor Information Centre Springsure Caravan park	120
Central	Central Highlands Visitor Information Centre Emerald Cabin & Caravan Village Emerald Overnight Camping Reserve	118
Lake Maraboon	Lake Maraboon Holiday Village	94
Gemfields	Sapphire Trading Post Pat's Gems Rubyvale Gem Gallery Miners Heritage Mine Rubyvale Holiday Units Anakie Gemfields Caravan Park Blue Gem Caravan Park Rubyvale Caravan Park Gemfest	152
Other	Rockhampton (stopped in the Central Highlands)	3
Total		644

The proportion of questionnaires completed by area is close to the distribution of visitor nights by area (from the visitor numbers benchmarking report), as shown below.

Table 66 Comparison of sample distribution and visitor nights by area

Area	Visitor profile sample	Total visitor nights[1]	Non-business visitor nights[1]
Central	32.3%	52.0%	49.2%
East	16.9%	18.0%	14.2%
Gemfields	24.0%	12.3%	16.5%
North	7.9%	6.8%	5.9%
South	18.9%	11.0%	14.2%
Central Highlands	100.0%	100.0%	100.0%

1. From the visitor benchmarking survey (Section2).

Even thought the visitor profile survey sample distribution by area is close to the distribution of visitor nights by area (from the visitor benchmarking study), each completed survey questionnaire was weighted by the number of visitors by main accommodation used and area to more closely reflect the overall visitor population of the Central Highlands. In addition, expenditure data from the survey of residents hosting visiting friends or relatives was incorporated with the visitor survey to strengthen results from this segment.

A priority of the study was to identify characteristics of holiday and leisure travellers, rather than business or corporate travellers, as Council, industry operators and tourism organisations have more influence over visitor demand by the former than the latter segment. Hence, the survey design focused on places holiday and leisure travellers visited, rather than used by business travellers. Therefore, the sample and results of the visitor profile, over-represent characteristics of holiday and leisure travellers, and understate those of business travellers. For example, operator-based estimates of visitor nights from the visitor benchmarking survey (Section 2) indicated approximately 33 per cent of total visitor nights in the Central Highlands are by the business and corporate market, whereas business nights from the visitor profile survey (Section 3) represent 5 per cent of total visitor nights in the region. Clearly the latter understates the size of the business market in the region. However, the main interest in the visitor profile survey was on holiday and leisure travellers, and the survey provides a solid profile of this market.

Estimates of the total value of tourism to the Central Highlands, including holiday/leisure and business/ corporate travel, plus daytrippers, are provided at the end of the report, with the value of business travel estimated from survey data and augmented with unpublished data from the National Visitor Survey and Australian Bureau of Statistics.

5.6 Value of tourism estimates methodology

5.6.1 Introduction

Visitor expenditure data used in modelling the economic impact of tourism to the Central Highlands Region was sourced from using published and unpublished data from organisations such as the Australian Bureau of Statistics and Tourism Research Australia, along with survey results derived from a sample survey of 289 Central Highland residents, a survey of 70 accommodation operators, and survey of 644 visitors at various locations throughout the Central Highlands. These data were transformed into industry supplier profiles and basic values and used in an econometric model (incorporating input-output tables for the Central Highlands Region) developed by Applied Economic Research, to produce estimates of value added, wages and salaries and employment associated with tourism activity in the Central Highlands region.

A brief discussion of the terms, definitions methodology underlying the estimates follows.

5.6.2 Scope

Tourism is not identified as a conventional industry or product in international statistical standards since tourism is defined by what the visitor purchases or uses, rather than what the supplier produces. The tourism satellite account approach has been adapted in Australia by the ABS to enable the economic aspects of tourism to be drawn out and analysed separately within the structure of other industries and the economy generally.

The estimates provide a measure of the share of goods and services provided by all businesses and other organisations to visitors, rather than the value of goods and services provided by businesses and organisations serving visitors only. Many businesses and organisations in the Central Highlands region will be providing goods and services to both visitors and residents. The estimates in this study capture just that share of economic activity arising from expenditure by visitors and their use of facilities in the region.

The estimates of tourism activity are not limited to leisure activity, and include travel for business or other reasons, such as education, provided the destination is outside the person's usual environment.

The estimates of tourism consumption are defined to include transactions between a visitor and a business or organisation with which the visitor has direct contact. Direct contact does not necessarily imply payment has to occur. For example, tourism consumption includes an imputation for the value of non-market services provided directly to visitors, e.g. museums and libraries, even though these may be provided free or at a price which is not economically significant (this is consistent with the treatment in the national accounts of non-market services provided by government and non-profit institutions).

Other aspects of methodology and definitions are addressed in the following sections.

5.6.3 DEFINITION OF TERMS

This section of the report discusses the concepts of economic impact and includes a summary of the techniques of economic impact analysis used in this section of the report. The term *economic impact* is applied to indicate the significant economic effects or consequences on major economic indicators in the regional economy associated with tourism activity in the Central Highlands region. The economic impacts are estimated for:

- initial effects associated with employment and purchases of businesses and organisations supplying goods and services to visitors.
- flow-on effects (representing flow-on or ripple effects which occur as second, third, and subsequent-round purchases flow throughout the Central Highlands regional economy)

All values are expressed in 2008/09 dollars.

Initial Economic Impact

This is the activity of those firms and organisations directly involved in supplying goods and services to Central Highlands visitors. This initial impact includes the activity of those firms in terms of output (production), employment in these firms, wages and salaries paid by these firms and value-added by these firms. The initial output impact occurs in the form of the purchases of goods and services by these firms from other firms in the regional economy.

Flow-on Economic Impact

Flow-on effects arise from the linkages between industries in the economy. The initial expenditures give rise to flow-on or ripple effects that occur as second, third, and subsequent-round purchases flow throughout the economy in question. For example, local motel staff purchase food products from local supermarkets, which in turn purchase local fruit and vegetables from farmers, who in turn purchase machinery, etc. The sum of these second, third, and subsequent-round purchases is termed the flow-on (or multiplier) effect.

This expenditure represents inputs purchased from firms not directly involved with visitor activity, which in turn purchase inputs from other (or the same) firms in subsequent rounds of purchases, and so on. In addition, these firms pay wages and salaries to employees who purchase commodities for personal consumption. All of these additional effects over and above the initial expenditure are referred to as multiplier or flow-on effects, and are commonly expressed in terms of output (or total expenditure), gross regional product (value added), income (wages and salaries), and employment.

Total Economic Impact

The total impact is the sum of the initial and flow-on economic impacts. This gives an estimate of the overall impact of tourism activity in the Central Highlands region on the economy and is usually measured in terms of expenditure, household income, employment and value added, defined as follows.

- employment - the number of jobs in full-time equivalent terms, generated as a result of tourism activity in the Central Highlands region.
- wages & salaries - the wages and salaries paid to households corresponding to employment generated as a result of tourism activity in the Central Highlands region.
- value-added - the contribution to gross regional product, or net output (which is the gross value of goods and services purchased less intermediate inputs and imports). Value added excludes the double counting associated with gross output estimates and represents the value added to products and services that firms in the region produce.

A further important factor determining the level of impact of tourism activity in the Central Highlands region is the diversity of the regional economy, or the degree to which this economy will be able to supply the direct inputs required by the Central Highlands tourism firms. Similarly, this level or diversity will also determine the extent to which expenditure associated with tourism activity in the Central Highlands region will be retained within the regional economy or "leak" from the economy in the form of imported commodities in the second, third and subsequent-round flow-on impacts.

Impact stages

This study utilises input-output methodology for the estimation of the initial and flow-on economic impacts. Input-output analysis is the technique most widely used for impact estimation, and measures the economic impacts on the regional economy in terms of the initial, flow-on and total effects. These are summarised in the following diagram.

Impacts	Source
Initial	Initial impacts arise from a weekend package at a Springsure motel purchased by a visitor. The motel operator buys goods (such as local bakery and dairy goods for breakfasts for guests) from other Central Highlands, and employs staff.
Flow-on	Flow-on impacts are generated from purchases then made by these suppliers (i.e., by the local bakery and dairy) elsewhere in the region, as well as from the purchases made in the region by staff of the motel property.

5.6.4 MODELLING

The following were the steps used to derive the estimates of economic impact of tourism to the Central Highlands Region.

- Estimates of expenditure by domestic, international and day visitors to the region were derived from surveys of visitors and residents in the region primarily (supplemented with data from the National and International Visitor Surveys in the case of business travellers).
- Some additional data relating to imputed values (for rents on holiday homes in the region, etc.), were derived from ABS data.
- Once the level of visitor expenditure was determined, this was converted from expenditure by item or commodity (i.e., expenditure on shopping) to expenditure by industry. This was done by mapping visitor expenditure to industries using the ABS tourism satellite account methodology.
- ABS data on business operations for each industry involved were used to derive employment, purchases and other expenditure estimates. These expenditure amounts were then converted into basic values consistent with the accounting format of the input-output model. The expenditures are recorded in purchasers' values, whereas basic values are measured net of trade and transport margins. The conversion required the reallocation of the trade and transport margins included in the purchasers' prices back to the appropriate trade or transport sector. The margins used are those used to convert purchasers' values to basic values in the national input-output tables. The margins include commodity taxes, wholesale and retail margins, road, rail, water and air transport margins, marine insurance and restaurants, hotels and clubs margins. Commodity taxes and restaurants, hotels and clubs margins (taxes) are assumed to be leakages from the region, wholesale and retail margins are reallocated to the Trade sector, transport margins to the Transport sector, and insurance to the Finance sector.
- Each industry identified in the input-output model was then decomposed into two components; expenditure and sales associated with visitors and expenditure and sales associated with residents only. The expenditure and sales data associated with visitors was then aggregated to represent a single tourism 'industry' in the model.
- The visitor expenditure impacts were estimated using a non-linear interindustry model development by Applied Economic Research. The input-output database was derived from an input-output table of the Central Highlands regions constructed by Applied Economic Research. This was then merged into a non-linear modelling framework adapted from the SIRE (Simulating Impacts on Regional Economies) model.[12]
- The model estimates the ratio of the level of tourism expenditure at basic values to total Central Highlands Region production for each industry. The ratios were then used to allocate value added, incomes and employment to tourism - the values and estimates shown in this report.

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[12] West, G.R. and Jackson, R.W. Non-Linear Input-Output Models: Practicability and Potential. 43rd Western Regional Science Association Meeting, Maui, Hawaii, 2004; West, G.R. and Jackson, R.W. Simulating Impacts on Regional Economies: A Modelling Alternative. Faculty of Business Working Paper 05/2 Vol.8 No.2, University of the Sunshine Coast. 2005]

5.6.5 LIMITATIONS ON THE USE OF IMPACT ANALYSIS

Empirical economic analysis is inevitably accompanied by some limitations on the interpretation of results. One limitation results from the nature of the data used in the model. These data, while drawn from the best estimates of the level and structure of the various types of economic activity making up the model, are representative rather than exact in nature. High levels of accuracy in terms of exactness cannot be guaranteed in an analysis of this type.

ATTACHMENT 1: ACCOMMODATION TYPES SHARED

% of visitors	Accommodation type							
Accommodation	**Hotel/ motel / motor inn/ resort**	**Caravan park or commercial camping ground**	**Caravan / camping in a state or national park**	**Caravan /camping by side of road/prvte property**	**Friends or relatives property**	**Rented house / apartment / unit / holiday flat**	**Own property**	**Other**
Hotel/ motel / motor inn/ resort	75.5%	16.5%	0.3%	0.3%	7.4%	0.0%	0.0%	0.0%
Caravan park or camping ground	85.5%	0.0%	5.0%	5.2%	1.0%	3.3%	0.0%	0.0%
Caravan /camping in a state or national park	86.4%	0.0%	0.0%	11.6%	2.0%	0.0%	0.0%	0.0%
Caravan /camping by side of road/prvte property	94.2%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	1.0%
Friends or relatives property	89.4%	10.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rented house/ apartment/unit/ flat	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Own property	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

ATTACHMENT 2: PLACES IN COMMON VISITED

% of visitors	Stay / visit														
Places	**Bauhinia**	**Blackdown Tableland NP**	**Black-water**	**Capella**	**Carnarvon NP**	**Duar-inga**	**Emerald**	**Lake Maraboon**	**Roll-eston**	**Ruby-vale**	**Sap-phire**	**Spring-sure**	**Tieri**	**Willows / Anakie**	**Other places**	**Total**
Bauhinia	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Blackdown Tableland NP	0%	100%	5%	8%	17%	5%	26%	13%	8%	8%	5%	0%	0%	14%	10%	100%
Blackwater	0%	1%	100%	2%	7%	4%	5%	1%	1%	2%	4%	2%	0%	1%	2%	100%
Capella	0%	5%	7%	100%	13%	3%	16%	10%	5%	4%	1%	10%	0%	1%	6%	100%
Carnarvon National Park	0%	1%	3%	1%	100%	1%	15%	9%	1%	5%	1%	2%	0%	3%	4%	100%
Duaringa	0%	2%	13%	2%	6%	100%	19%	5%	1%	5%	10%	8%	0%	5%	8%	100%
Emerald	0%	1%	2%	1%	11%	2%	100%	5%	2%	4%	2%	1%	0%	1%	2%	100%
Lake Maraboon	0%	2%	1%	3%	29%	2%	19%	100%	2%	8%	4%	2%	0%	4%	4%	100%
Rolleston	0%	5%	3%	5%	16%	2%	33%	9%	100%	7%	0%	3%	0%	0%	0%	100%
Rubyvale	0%	2%	4%	1%	20%	2%	20%	11%	3%	100%	14%	6%	0%	9%	3%	100%
Sapphire	0%	1%	10%	1%	5%	6%	15%	8%	0%	19%	100%	8%	0%	9%	6%	100%
Springsure	0%	0%	7%	8%	19%	9%	12%	7%	3%	15%	14%	100%	0%	4%	3%	100%
Tieri	0%	0%	66%	34%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	66%	100%
Willows / Anakie	0%	7%	4%	1%	25%	5%	14%	12%	0%	20%	15%	4%	0%	100%	7%	100%
Other places	0%	2%	3%	2%	14%	3%	8%	5%	0%	3%	4%	1%	0%	3%	100%	100%

ATTACHMENT 3: LETTER OF INTRODUCTION

CH central highlands regional council

CONTACT NAME Phil Brumley
TELEPHONE (07) 4982 3342
MOBILE 0427 328 328
FAX 1300 242 687
EMAIL pbrumley@chrc.qld.gov.au
Emerald Office, PO Box 21 Emerald Qld 4720

9th July, 2009

Dear Tourism Industry Colleague

Reference: Central Highlands Tourism Study

Central Highlands Regional Council (with Federal funding through the Department of Infrastructure, Transport, Regional Development and Local Government's Better Regions program) have commissioned Tourism Potential and EC3 Global to develop a strategic plan to demonstrate and document the importance of tourism to the regional economy and raise the profile of the industry with government and stakeholders in other industries.

The project will also outline actions to increase visitation of the Central Highlands and enhance the appeal of key attractions and places (such as the Gemfields, Carnarvon Gorge, Capella, Blackwater, Lake Maraboon, etc), and identify potential business development opportunities.

For tourism operators, the project intends identifying gaps and opportunities in the market that can potentially benefit your own business. A large part of the project involves interviews with visitors throughout the region to identify what they do, where they go, what they spend, what they want, etc., so the strategy will be based on real information about visitors in the Central Highlands. The collection of this and other data for the project requires some assistance from tourism businesses and other local organisations. In return we will provide all participating businesses and organisations with a regional summary later this year.

This project is a first for the Central Highlands region and in view of the useful information it will provide us all, we look forward to your participation as per the request enclosed from the consultants.

Please contact project team members, Stephen Taylor (3878 2209) or Mark Olsen (3238 1910) if you require further information about the study.

Yours faithfully

Peter Maquire
Mayor
Central Highlands Regional Council

Grant Cassidy
Chairman
Capricorn Tourism & Development Inc.

ALL CORRESPONDENCE TO BE ADDRESSED TO THE CHIEF EXECUTIVE OFFICER - ATTN: [CONTACT NAME]
PO BOX 21 / 65 Egerton Street Emerald Qld 4720 General Enquiries: 1300 242 686 Fax: 1300 242 687 Email: enquiries@chrc.qld.gov.au

ATTACHMENT 4: HOTEL/MOTEL QUESTIONNAIRE

Central Highlands Accommodation Survey
Year ending June 2009

Purpose of the survey:
This is an essential part of the project to estimate the size and value of the tourism industry in the Central Highlands. The project has received Federal funding through the Department of Infrastructure, Transport, Regional Development and Local Government's Better Regions program.

Scope of information:
The information requested is similar to that required by the Australian Bureau of Statistics in their Accommodation Survey. If you participate in the ABS survey you may want to use information previously supplied in this form.

Confidentiality:
Your completed form remains confidential to Tourism Potential and EC3 Global.

Due Date:
Please complete this form and return it by 7th August 2009 to EC3 Global:

- in the reply paid envelope, or
- by fax: 3211 4734, or
- by scanning and emailing to mark.olsen@ec3global.com

Help
If you have questions when completing this form, please contact:

- Stephen Taylor (07 38782209, stephen@tourism-potential.com.au), or
- Mark Olsen (07 3238 1910, mark.olsen@ec3global.com).

Please complete all shaded boxes.

Your organisation:	
Contact Name:	Telephone No:

1. Capacity

Number of rooms/units/apartments/suites as at:

	Number
30 September 2008	
31 December 2008	
31 March 2009	
30 June 2009	

> **Note**
> Only report details for rooms/ units/ apartments/ suites which provide short-term (2 months or less) non-residential accommodation (i.e. not on a lease basis).

2. Accommodation takings including GST

Accommodation takings including GST for the year ending 30 June 2009: $

> **Note**
> - Where accommodation, meals or other revenue are a combined total, only supply the proportion allocated to accommodation including its GST component.
>
> Include: Gross takings (including GST) derived from the provision of accommodation only
>
> Exclude: Takings from shops, kiosks, restaurants, bars, laundries, etc.

Commercial in Confidence

Please turn over

3. Number of room/unit nights, guest nights and guest arrivals

Room/unit Nights	Guest Nights	Guest Arrivals
Definition: Room/unit nights are the total number of room/ unit/ apartment/ suites occupied each night over the quarter. Exclude: Rooms/units booked, but not occupied	Definition: Guest nights are the total number of guests staying each night over the quarter. Include: Children occupying beds & all paying guests Exclude: Babies in cots, non-paying guests/staff	Definition: Guest arrivals are the total number of new people counted only on the day they arrive. Include: Children occupying beds &all paying guests Exclude: Babies in cots, Non-paying guests/staff

Quarter ending	Number of: Room/unit nights	Guest nights	Guest arrivals
30 September 2008			
31 December 2008			
31 March 2009			
30 June 2009			
Total			

4. Market Mix

For each quarter, what do you estimate the market mix in percentages of room/unit guest nights were?

Market	Quarter ending: Sep 08 (%)	Dec 08 (%)	Mar 09 (%)	Jun 09 (%)
Holiday/leisure				
Corporate/business/mining				
Other				
Total	100%	100%	100%	100%

5. Number of persons working for this establishment during the last pay period in each quarter:

	Number, for quarter ending: Sep 08	Dec 08	Mar 09	Jun 09
Full-time				
Part-time				
Casual				
Total				

Definitions:

- Full-time - those working 35 hours or more a week.
- Part-time - those usually working a standard week of less than 35 hours and are entitled to paid holiday or sick leave.
- Casual - those generally required on an as-needs basis, and who are not usually entitled to paid holiday or sick leave.

Include:

- Persons paid a retainer, wage or salary
- Working proprietors and partners
- Permanent, temporary and casual employees

Exclude:

- Persons paid by commission only
- Non-salaried directors
- Self employed persons such as consultants and contractors
- Volunteers

Thank you for helping us with this survey

ATTACHMENT 5: CARAVAN PARK QUESTIONNAIRE

Central Highlands Accommodation Survey
Year ending June 2009

Purpose of the survey:
This is an essential part of the project to estimate the size and value of the tourism industry in the Central Highlands. The project has received Federal funding through the Department of Infrastructure, Transport, Regional Development and Local Government's Better Regions program.

Scope of information:
The information requested is similar to that required by the Australian Bureau of Statistics in their Accommodation Survey. If you participate in the ABS survey you may want to use information previously supplied in this form.

Confidentiality:
Your completed form remains confidential to Tourism Potential and EC3 Global.

Due Date:
Please complete this form and return it **by 7th August 2009** to EC3 Global:
- in the reply paid envelope, or
- by fax: 3211 4734, or
- by scanning and emailing to mark.olsen@ec3global.com

Help
If you have questions when completing this form, please contact:
- Stephen Taylor (07 38782209, stephen@tourism-potential.com.au), or
- Mark Olsen (07 3238 1910, mark.olsen@ec3global.com).

Please complete all shaded boxes.

Your organisation:	
Contact Name:	Telephone No:

1. Capacity

Number of vans/ sites/ cabins, etc., as at:

	Onsite vans	Other powered sites	Unpowered sites	Cabins, villas, etc.
30 September 2008				
31 December 2008				
31 March 2009				
30 June 2009				

Definition
An onsite van is a van owned or leased by the establishment for the purpose of providing accommodation to the general public.
Including:
- Unpowered tent sites
- Sites used only at peak periods
- Sites, cabins, etc. permanently occupied or reserved

2. Number of sites permanently occupied or reserved

Number of vans/ sites/ cabins, etc., permanently occupied or reserved as at:

	# permanently occupied	# permanently reserved
30 June 2009:		

Definition
- Permanently occupied sites, cabins, etc. are those that have been occupied on a continuous basis for 2 months or more on the last day of the quarter.
- Permanently reserved sites, cabins, etc. are those that have been continuously let for 2 months or more on the last day of the quarter, but only occupied on an occasional basis e.g. holidays, seasonally.

Commercial in Confidence

Please turn over

3. Number of van/ site/ cabin nights occupied

Quarter ending:	Number of van/ site/ cabin nights
30 September 2008	
31 December 2008	
31 March 2009	
30 June 2009	
Total	

Definition
Site nights are the total number of sites, cabins, etc. occupied or reserved on each night of the quarter. Add nightly figures to obtain quarterly totals.
Include:
- Casuals/Tourists staying short term
- Sites, cabins, etc. permanently occupied
- Sites permanently reserved (occupied or not)

4. Length of stay and group size

For the year ending 30 June 2009, what is your estimate of the average:

Length of stay of your guests: ______ nights

No. guests per van/site/cabin: ______ guests

5. Market Mix

For each quarter, what do you estimate the market mix of van/site/cabin nights was?

Market	Quarter ending			
	Sep 08 (%)	Dec 08 (%)	Mar 09 (%)	Jun 09 (%)
Holiday/leisure				
Corporate/business/mining				
Other				
Total	100%	100%	100%	100%

6. Accommodation takings including GST

Accommodation takings including GST for the year ending 30 June 2009: $

Note
- Where accommodation, meals or other revenue are a combined total, only supply the proportion allocated to accommodation including its GST component.

Include: Gross takings (including GST) derived from the provision of accommodation only

Exclude: Takings from shops, kiosks, restaurants, bars, laundries, etc.

7. Number of persons working for this establishment during the last pay period in each quarter:

	Number, for quarter ending			
	Sep 08	Dec 08	Mar 09	Jun 09
Full-time				
Part-time				
Casual				
Total				

Definitions:
- Full-time - those working 35 hours or more a week.
- Part-time - those usually working a standard week of less than 35 hours and are entitled to paid holiday or sick leave.
- Casual - those generally required on an as-needs basis, and who are not usually entitled to paid holiday or sick leave.

Include:
- Persons paid a retainer, wage or salary
- Working proprietors and partners
- Permanent, temporary and casual employees

Exclude:
- Persons paid by commission only
- Non-salaried directors
- Self employed persons such as consultants and contractors
- Volunteers

Thank you for helping us with this survey

ATTACHMENT 6: DAYTRIP AND VFR QUESTIONNAIRE

Central Highlands Daytrip and VFR Survey

Date

Town

Good morning/afternoon/evening. My name is ________ from Iview, an independent research company. We are doing a short survey on behalf of the Central Highlands Regional Council on the places residents go to on daytrips and with friends and relatives.

This survey takes about 9-10 minutes. The results will be used by Council and other organisations to assist in providing better facilities and services for residents and visitors. The information you provide will be completely confidential and used only for research purposes. No information will be collected on you as an individual.

DAYTRIPPING

First I would like to ask you about daytrips you take in the Central Highlands, this being the region from Bogantungan in the west, to Duaringa in the east, to Capella in the north and Carnarvon Gorge in the south. **A daytrip is where you travelled a distance of at least 50km in total and were away from home for at least 4 hours, but did not stay overnight.** For example, this might be a trip for pleasure driving or sightseeing, to visit friends or relatives, to visit a gallery or museum or park or attended to a special event or other form of entertainment.

DT1. On average, how often did you take daytrips to the Central Highlands in the last 12 months? *Read out. Single response.*

None, did not take any day trips 1
1-4 daytrips over the whole year 2
4-11 daytrips over the whole year 3
Once a month 4
2-3 times a month 5
Once a week 6
More than once a week 7

If respondents answer 1, please go directly to next section on page 4
If respondents answer 7, confirm these were non-overnight trips from home which were non-routine.

DT2. Thinking back over the last 12 months, did you generally take more or less daytrips to the Central Highlands in summer or winter? *Read out. Single response.*

More daytrips in summer 1
More daytrips in winter 2
About the same number of daytrips in summer and winter 3

I'd now like to get some extra detail about **your most recent** day trip.

DT3. What was the main place, town or destination of your last daytrip to the Central Highlands? *Single response (main place being where you spent the most time)*

Bauhinia 1
Blackdown Tablelands National Park 2
Blackwater 3
Capella 4
Carnarvon National Park 5
Duaringa 6
Emerald 7
Lake Maraboon 8
Rolleston 9
Rubyvale 10
Sapphire 11
Springsure 12
Tieri 13
Other (SPECIFY) 14

 1

DT4. What was the main reason for this daytrip to the Central Highlands? *Single response*

Visiting friends (incl. weddings etc involving friends) 1
Visiting relatives (incl. family weddings etc) 2
Holidays / leisure / relaxation / getting away 3
Entertainment / attending special event - e.g. festival, performance 4
Sport – participation 5
Sport – spectating 6
Shopping 7
Business 8
Conferences / exhibitions / conventions / tradefairs 9
Training and research (employed - not student) 10
Education (mostly students) 11
Employment / leisure (e.g. working holiday) 12
Personal appointment / business (excl. health) 13
Health-related 14
Providing transport 15
Other (SPECIFY) 16

DT5. I'd now like to ask you about your travel party, that is, all persons with whom you directly travelled and shared most expenses. Don't forget to count yourself and any children. So in total, how many were in your travel party on your last daytrip to the Central Highlands?

DT6. And what activities did you do during this trip to the Central Highlands? *Multiple response. Prompt if respondent unsure*

General sightseeing 1
Visit historical sites 2
Eat out 3
Go shopping 4
Visit museums or art galleries 5
Bushwalking 6
Visit national parks 7
Visit botanical gardens 8
Picnics / BBQs 9
Go to the markets 10
Visit a recreation park/sports facility/swimming pool 11
Visit friends or relatives 12
Visit winery / cellar door 13
Go bird watching 14
Go on a designated tourist drive 15
Go fishing 16
Go on an organised tour 17
Go fossicking 18
Visit a farm/have a farm stay experience 19
Cycling 20
Other sporting activity (e.g. bowls, tennis, etc) 21
Golf 22
Go four wheel driving 23
Business 24
Conference or exhibition 25
Attend an organised sporting event 26
Other (SPECIFY) 27

DT7. What improvements, if any, do you suggest be made to the particular place, attraction or facility at the main daytrip destination, to make your experience more enjoyable in the future?

Now I would like to ask about how much you recall spending in total on your most recent day trip

DT7. How much did you and people in your travel party altogether, spend on your most recent daytrip in the Central Highlands on the following?

Please include any expenditure made before your trip (such as a deposit by credit card). Travel party means the people you are sharing expenses with.

Pleasure shopping, gifts, souvenirs	$
Takeaways, drinks and restaurant/café meals	$
Fuel	$
Car hire	$
Groceries	$
Tours, entrance fees	$
Fishing gear/supplies	$
Fossicking gear/supplies	$
Other (please describe)	$

Other - for example phone, postage, medical expenses, repairs, dry cleaning, film processing, books, etc.

VISITING FRIENDS AND RELATIVES

Now I'd like to ask about activities related to friends or relatives who stayed with you this past year

VFR1. For the year ending 30 June 2009, how many occasions did you have friends of relatives staying with you? *Or how many groups of friends or relatives stayed with you last year – the same group visiting more then once counts as a separate group.*

If none, thank and conclude interview.

VFR2. Approximately how many people on average stayed with you each time?

VFR3. Approximately how many nights on average did they stay with you?

The next few questions ask about the group of friends or relatives that stayed with you most recently

VFR4. How many times did this group of friends or relatives stay with you in the year ending 30 June 2009?
Single response

Once – this was their first time	1
Twice in the year	2
Three or more times during the year	3

VFR5. How many people were in the group that stayed with you?

VFR6. How many nights did they stay with you?

3

VFR7. During their stay with you, what places in the Central Highlands did they visit: *Multiple response Prompt if respondent unsure*

Bauhinia ... 1
Blackdown Tablelands National Park ... 2
Blackwater ... 3
Capella ... 4
Carnarvon National Park ... 5
Duaringa ... 6
Emerald ... 7
Lake Maraboon ... 8
Rolleston ... 9
Rubyvale ... 10
Sapphire ... 11
Springsure ... 12
Tieri ... 13
None/stayed at our home ... 14
Other (SPECIFY) ... 15

VFR8. During their stay, which of the following activities did they undertake in the Central Highlands? *Multiple response. Prompt if respondent unsure.*

General sightseeing ... 1
Visit historical sites ... 2
Eat out ... 3
Go shopping ... 4
Visit museums or art galleries ... 5
Bushwalking ... 6
Visit national parks ... 7
Visit botanical gardens ... 8
Picnics / BBQs ... 9
Go to the markets ... 10
Visit a recreation park/sports facility/swimming pool ... 11
Visit friends or relatives ... 12
Visit winery / cellar door ... 13
Go bird watching ... 14
Go on a designated tourist drive ... 15
Go fishing ... 16
Go on an organised tour ... 17
Go fossicking ... 18
Visit a farm/have a farm stay experience ... 19
Cycling ... 20
Other sporting activity (e.g. bowls, tennis, etc) ... 21
Golf ... 22
Go four wheel driving ... 23
Business ... 24
Conference or exhibition ... 25
Attend an organised sporting event ... 26
Other ... 27

VFR9. What particular Central Highlands place, attraction or facility do you think they enjoyed most during their stay with you?

Finally, I would like to ask about how much you estimate they may have spent during their stay with you, and how much you spent on expenses associated with their visit. You may not know exactly how much they spent, but please provide your best estimate.

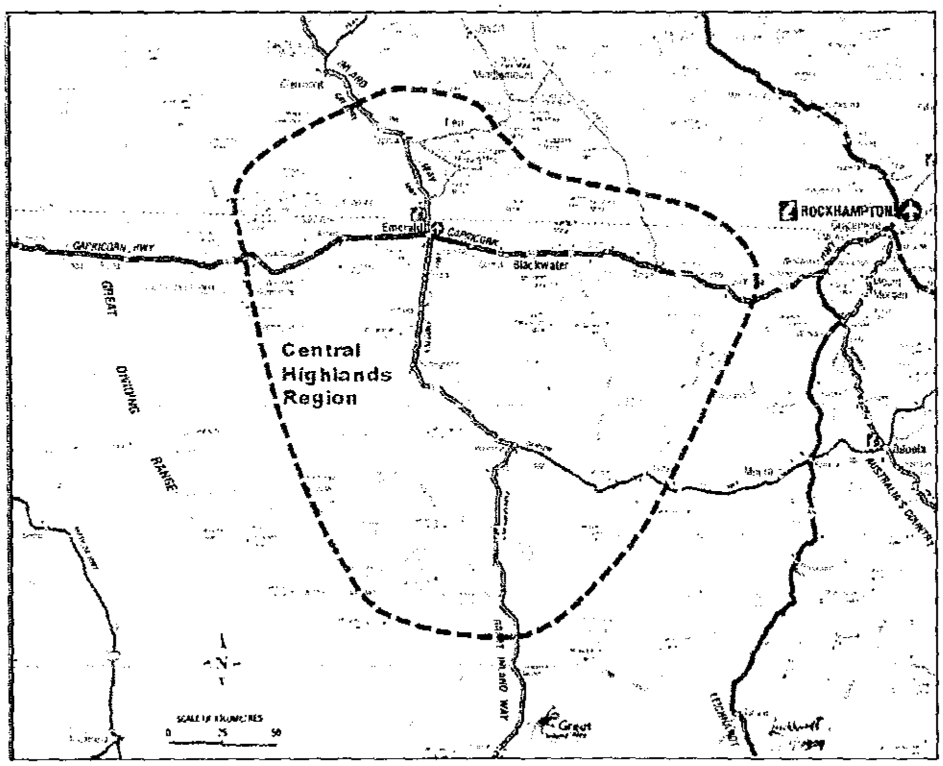
VFR10. How much do you estimate they spent, and you spent in the Central Highlands on costs associated with their visit in total on:

Please include any expenditure made before your trip (such as a deposit by credit card). Travel party means the people you are sharing expenses with. Combined expenditure of the visitor and resident householder.

Accommodation	$
Pleasure shopping, gifts, souvenirs	$
Takeaways, drinks and restaurant/café meals	$
Fuel	$
Car hire	$
Groceries	$
Tours, entrance fees	$
Fishing gear/supplies	$
Fossicking gear/supplies	$
Other (please describe)	$

Other - for example phone, postage, medical expenses, repairs, dry cleaning, film processing, etc.

That's the end of the interview. Thank you for helping us with this survey.



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ATTACHMENT 7: VISITOR SURVEY QUESTIONNAIRE

WELCOME TO THE CENTRAL HIGHLANDS

The Central Highlands Regional Council, Tourism Potential and EC3 Global are conducting a survey to help provide better facilities and services for visitors in the future. We would greatly appreciate your help by completing this questionnaire. Please post the completed questionnaire using the reply paid envelope provided, or leave it at the reception desk. The information you provide will be completely confidential.

Please mark or tick ☑ the appropriate box and write in the spaces provided.

Please refer to the map on the next page for the Central Highlands boundary

1. What is the main purpose of this trip to the Central Highlands? *Mark one only*

- Holidays ☐
- Visiting relatives ☐
- Visiting friends ☐
- Attend an event ☐
- Entertainment ☐
- Sport ☐
- Work or business ☐
- Shopping ☐
- Conference ☐
- Other ☐

2. How many nights did you, or do you plan to stay in the Central Highlands region in total during this trip? [ ] nights

3. What town or city did you stay in before arriving in the Central Highlands region? [ ]

4. What is the first town or city you plan to stay in after leaving the Central Highlands region? [ ]

5. Before arriving in the Central Highlands region, which of the following information sources did you use when planning your visit to the Central Highlands region? *Mark all that apply*

- Visitor or tourist guide/book ☐
- Visitor information centre ☐
- State or national tourism agency ☐
- Recommendation by friends/relatives ☐
- Recommendation by tour desk/travel agent ☐
- Motoring organisations ☐
- Queensland Parks and Wildlife website ☐
- Central Queensland Highlands Planner ☐
- www.capricornholidays.com.au ☐
- www.queenslandholidays.com.au ☐
- Travel brochure/magazine ☐
- Included in tour/coach/holiday package ☐
- Articles, documentaries or news story ☐
- Been before/prior knowledge of the region ☐
- Google ☐
- Other Internet site ☐

6. Approximately how many times have you visited the Central Highlands region in the past 3 years? *Mark one only*

- Never before, this is my first visit ☐
- 1-2 times (not including this visit) ☐
- 3-4 times (not including this visit) ☐
- More than 4 times (not including this visit) ☐

7. What type of accommodation did or will you mainly use in the Central Highlands region? *Mark one only*

- Hotel/ motel / motor inn/ resort ☐
- Caravan park or commercial camping ground ☐
- Caravan /camping in a state or national park ☐
- Caravan /camping by side of road/prvte property ☐
- Guest house / Bed and Breakfast ☐
- Backpacker / visitor hostel ☐
- Friends or relatives property ☐
- Rented house / apartment / unit / holiday flat ☐
- Own property ☐
- Other ☐

8. What activities have you done or do you plan to do on your Central Highlands visit? *Mark all that apply*

- General sightseeing ☐
- Visit historical sites ☐
- Eat out ☐
- Go shopping ☐
- Visit museums or art galleries ☐
- Bushwalking ☐
- Visit national parks ☐
- Visit botanical gardens ☐
- Picnics / BBQs ☐
- Go to the markets ☐
- Visit friends or relatives ☐
- Visit winery / cellar door ☐
- Go bird watching ☐
- Go on a designated tourist drive ☐
- Go fishing ☐
- Go on an organised tour ☐
- Go fossicking ☐
- Visit a farm/have a farm stay experience ☐
- Visit a recreation park/sports facility/swimming pool ☐
- Other sporting activity (e.g. bowls, tennis, etc) ☐
- Golf ☐
- Go four wheel driving ☐
- Conference / exhibition / trade fair ☐
- Attend an organised sporting event ☐

Please turn over

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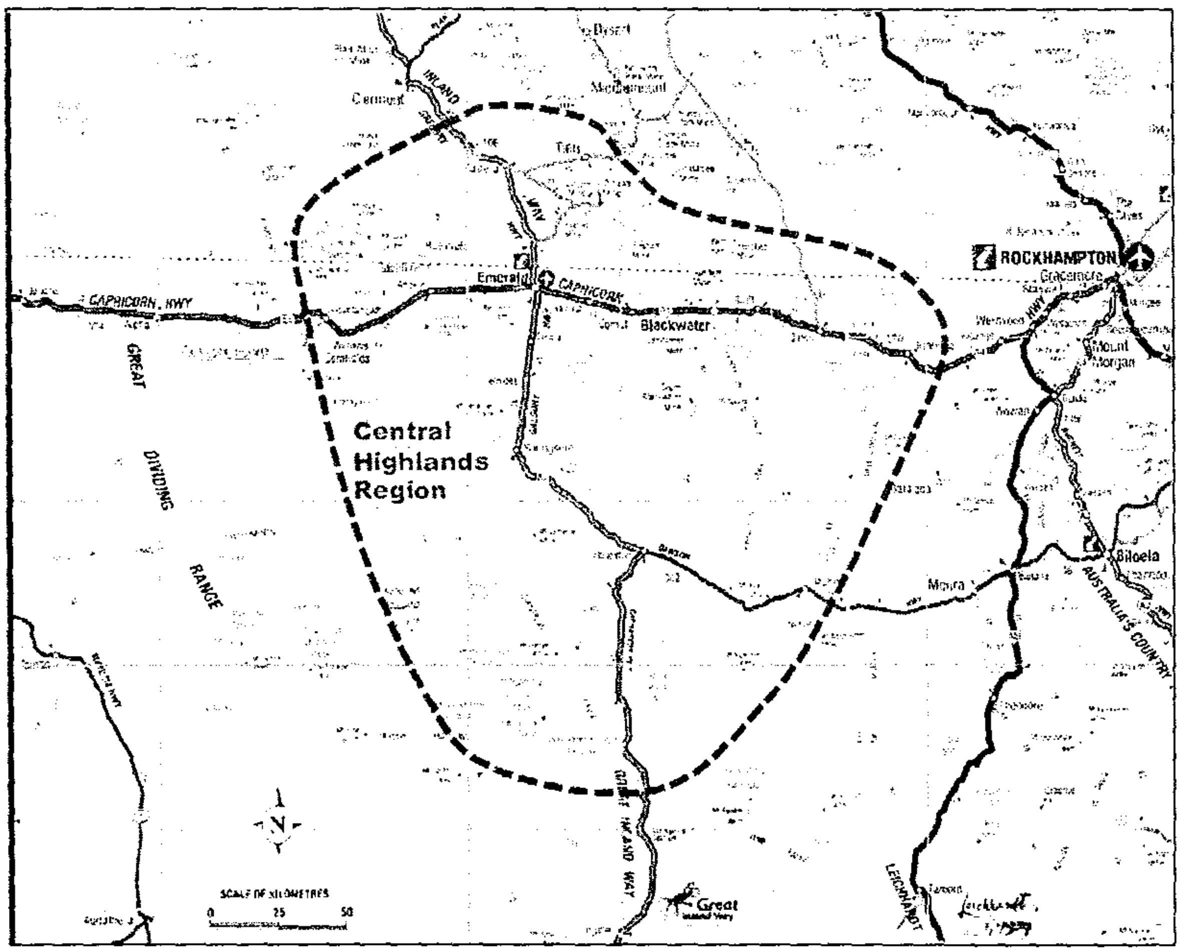
9. How long have you, or do you plan to spend at each of the following towns or places in the Central Highlands on this trip? Select only those places you actually stopped at or plan to stop at.

Please mark one box for each town/place

Town/Place	Passed through	Stopped during the day	Stayed one night	Stayed more than 1 night	Not travelling through
Bauhinia	☐	☐	☐	☐	☐
Blackdown Tableland National Park	☐	☐	☐	☐	☐
Blackwater	☐	☐	☐	☐	☐
Capella	☐	☐	☐	☐	☐
Carnarvon National Park	☐	☐	☐	☐	☐
Duaringa	☐	☐	☐	☐	☐
Emerald	☐	☐	☐	☐	☐
Lake Maraboon	☐	☐	☐	☐	☐
Rolleston	☐	☐	☐	☐	☐
Rubyvale	☐	☐	☐	☐	☐
Sapphire	☐	☐	☐	☐	☐
Springsure	☐	☐	☐	☐	☐
Tieri	☐	☐	☐	☐	☐
Willows / Anakie	☐	☐	☐	☐	☐
Other places in the Central Highlands	☐	☐	☐	☐	☐



TOURISM POTENTIAL

central highlands regional council

10. For each Central Highlands service or facility listed below, how satisfied or dissatisfied were you?

Please mark one box for each service / facility.

Visitor service / facility	Very satisfied	Slightly satisfied	Slightly dissatisfied	Very dissatisfied	Don't know, didn't use or do this
Commercial accommodation	☐	☐	☐	☐	☐
Nightlife	☐	☐	☐	☐	☐
Tours	☐	☐	☐	☐	☐
Shopping	☐	☐	☐	☐	☐
Availability of unique local arts & crafts	☐	☐	☐	☐	☐
Fossicking opportunities	☐	☐	☐	☐	☐
Food and beverage	☐	☐	☐	☐	☐
Attractions	☐	☐	☐	☐	☐
Information services	☐	☐	☐	☐	☐
Value for money	☐	☐	☐	☐	☐
Variety of things to see and do	☐	☐	☐	☐	☐
Local atmosphere	☐	☐	☐	☐	☐
Regular driver rest areas	☐	☐	☐	☐	☐
Personal safety / security	☐	☐	☐	☐	☐
Signage	☐	☐	☐	☐	☐
Friendliness of locals	☐	☐	☐	☐	☐
Roads	☐	☐	☐	☐	☐
Unspoilt natural environment	☐	☐	☐	☐	☐
Public toilets	☐	☐	☐	☐	☐
Information and interpretation	☐	☐	☐	☐	☐

11. What have you enjoyed most about your visit so far in the Central Highlands region?

12. What if anything about the Central Highlands region were you particularly unhappy with?

13. What improvements or additions to places, attractions or facilities would you like to see, to make the Central Highlands more enjoyable for visitors?

14. How many persons including yourself are you travelling with today? *(travelling with today means people you are sharing expenses with today)*

	Number
Children under 5 years:	
Children (5 - 15 years):	
Adults (16 - 25 years):	
Adults (26 - 45 years):	
Adults (46 - 65 years):	
Adults over 65 years:	
Total	

15. Do you live in Australia?

Yes What is your postcode?

No .... In which country do you live?

16. How much do you think you and people in your travel party altogether, will spend in the Central Highlands region in total on the following? *Please include an estimate of expenditure in the region to date and for the remainder of your visit in the Central Highland region. Travel party means the people you are sharing expenses with.*

Accommodation	$
Pleasure shopping, gifts, souvenirs	$
Takeaways and restaurant/café meals	$
Fuel	$
Car hire	$
Groceries	$
Fishing gear/supplies	$
Fossicking gear/supplies	$
Tours, entrance fees	$
Other (please describe)	$

Thank you for helping us with this survey. Please return it to the reception desk or post it to us in the reply paid envelope.