CLCAC

DESTINATION AND PRODUCT DEVELOPMENT PLAN

WARNING: Indigenous readers are advised that this document may contain images of or references to deceased persons.

Disclaimer

EXECUTIVE SUMMARY

Established in 1982 the Carpentaria Land Council Aboriginal Corporation (CLCAC) is today the largest and most eminent organisation representing the interests of Traditional Owner groups in the Southern Gulf Region. To ensure that the region maximises its Indigenous tourism potential into the future, and following the recommendations of the Economic Development Plan by Gordon Capital, this Destination and Product Development Plan has been commissioned.

The plan examines the region’s current tourism profile, and assesses competitive strengths and weaknesses with the aim to grow a sustainable Indigenous tourism economy following the recommendations of the Gordon Capital Indigenous Business and Economic Development Opportunities in the Gulf of Carpentaria Region report for the CLCAC (2012).

PROJECT AIMS

- ✓ Develop the Southern Gulf Region as an exemplar Indigenous tourism destination
- ✓ Create business opportunities and jobs for Traditional Owners
- ✓ Reinforce connections to country
- ✓ Show-case the Southern Gulf Region’s natural and cultural assets
- ✓ Stimulate and strengthen the economy

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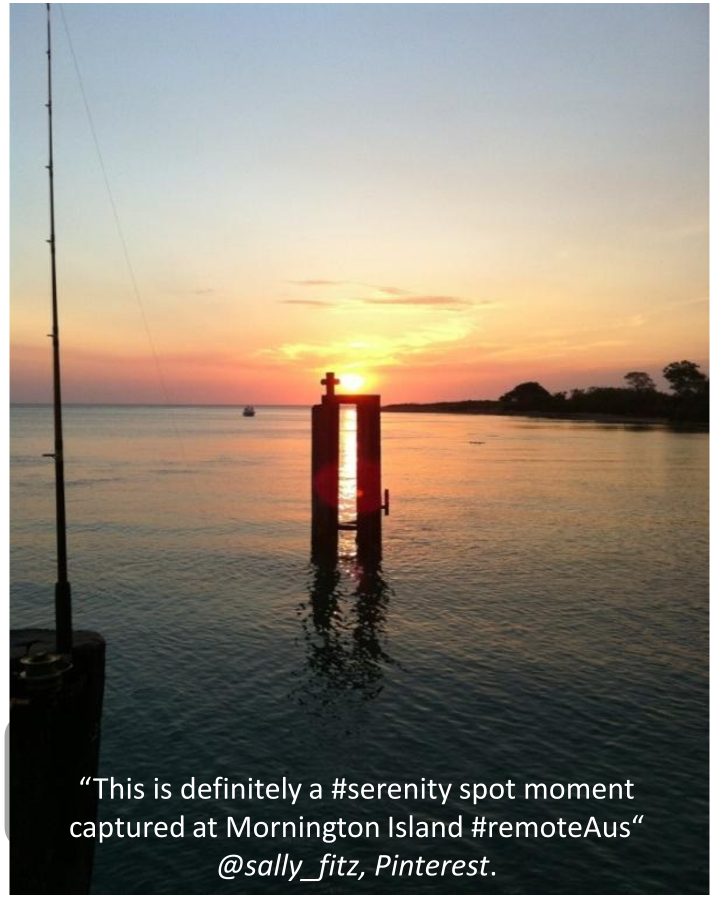

PART A: SETTING THE SCENE

Provides an overview of Project Aims, Objectives and Strategic Context.

1. Project Aims and Objectives

ABOUT CLCAC

Established in 1982 the Carpentaria Land Council Aboriginal Corporation (CLCAC) is today the largest and most eminent organisation representing the interests of Traditional Owner groups in the Southern Gulf of Carpentaria.

The CLCAC aims to identify, promote and negotiate opportunities for investment, resource development and other commercial projects to benefit Traditional Owner groups and Indigenous communities.

Over the years the CLCAC has assisted a number of Traditional Owner groups in the Southern Gulf Region successfully pursue native title rights over their traditional lands, resulting in successful determinations for the Waanyi Peoples, the Gangalidda and Garawa Peoples and the Lardil, Yangkaal, Gangalidda and Kaiadilt Peoples in relation to the land and waters in and around the Wellesley Islands.

Much of the remaining land in the Gulf is subject to native title claims lodged with the assistance of the CLCAC. In particular, CLCAC is currently assisting the Gangalidda and Garawa Peoples to pursue the remainder of their claim and assisting the Gkuthaarn and Kukatj Peoples and Kurtijar Peoples to prepare and lodge separate native title claims in the Normanton /Karumba area.

In March 2013 the organisation completed an Indigenous Business and Economic Development Opportunities in the Gulf of Carpentaria Region report which identified tourism as one of two primary growth opportunities.

ABOUT THE PROJECT

Indigenous communities of the Southern Gulf Region remain socially and economically disadvantaged. Adding to the unstable economic outlook for the region, the MMG Century Mine, one of the largest employers in the Region, is scheduled to move into shut down operations around 2014-16 and the current lack of summer rains underlines the vulnerability of the cattle industry.

There is a strong need and potential to drive economic development opportunities around the current and prospective Aboriginal ownership of significant areas of land in the region.

With a clear vision to respond to this scenario and develop a framework for investment and economic development in the region the CLCAC established a Business and Economic Support Program, through which it was identified that Indigenous Tourism is a clear opportunity for the region.

To ensure that the region maximises its Indigenous tourism potential into the future, Parker Travel Collection was commissioned to develop this Destination and Product Development Plan for CLCAC and key partners and to implement it over the next two-three years.

This plan examines the region’s current tourism profile, and assesses competitive strengths and weaknesses with the aim to grow a sustainable Indigenous tourism economy following the recommendations of the Gordon Capital Indigenous Business and Economic Development Opportunities in the Gulf of Carpentaria Region report for the CLCAC (2012).

PROJECT AIMS

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CASE STUDY: LAND AND SEA MANAGEMENT PROGRAM

The Land and Sea Management Program was established in 2007 by CLCAC as an extension of its role as a native title service body assisting Traditional Owners who possess both the opportunity and responsibility to manage and protect their traditional lands.

Currently comprised of 18 to 20 Rangers (depending on the seasons), the Land and Sea Management Program undertake management activities that enhance the protection and management of natural resources in the Southern Gulf Region for the long-term benefit of Traditional Owners and communities. Achievements of the program include successful strategic management of pest animal species, weed management and the control of weeds that are of national significance through to controlling plants on pastoral and exclusive native title land.

Fire management is another area of work carried out by the rangers with early season burns being prompted to reduce and limit destructive late season fires thus safeguarding land assets of the Southern Gulf Region. Sea grass monitoring, ghost net disposal work and protection of sea turtle nesting sites, undertaken by rangers, have also enabled the protection of critical marine resources in the Southern Gulf Region.

New and emerging economic and service delivery opportunities also being explored by the program include carbon farming; fees for service land and sea management and protected area management; tourism sector expansion; mining rehabilitation and land management activities; fisheries compliance and monitoring contracts and fee for service quarantine work (AQIS).

FUTURE OPPORTUNITY:

Build the capacity of existing rangers to act as tour guides and open the Southern Gulf Region up to opportunities for voluntourism.

2. About the Study Area

LOCATION

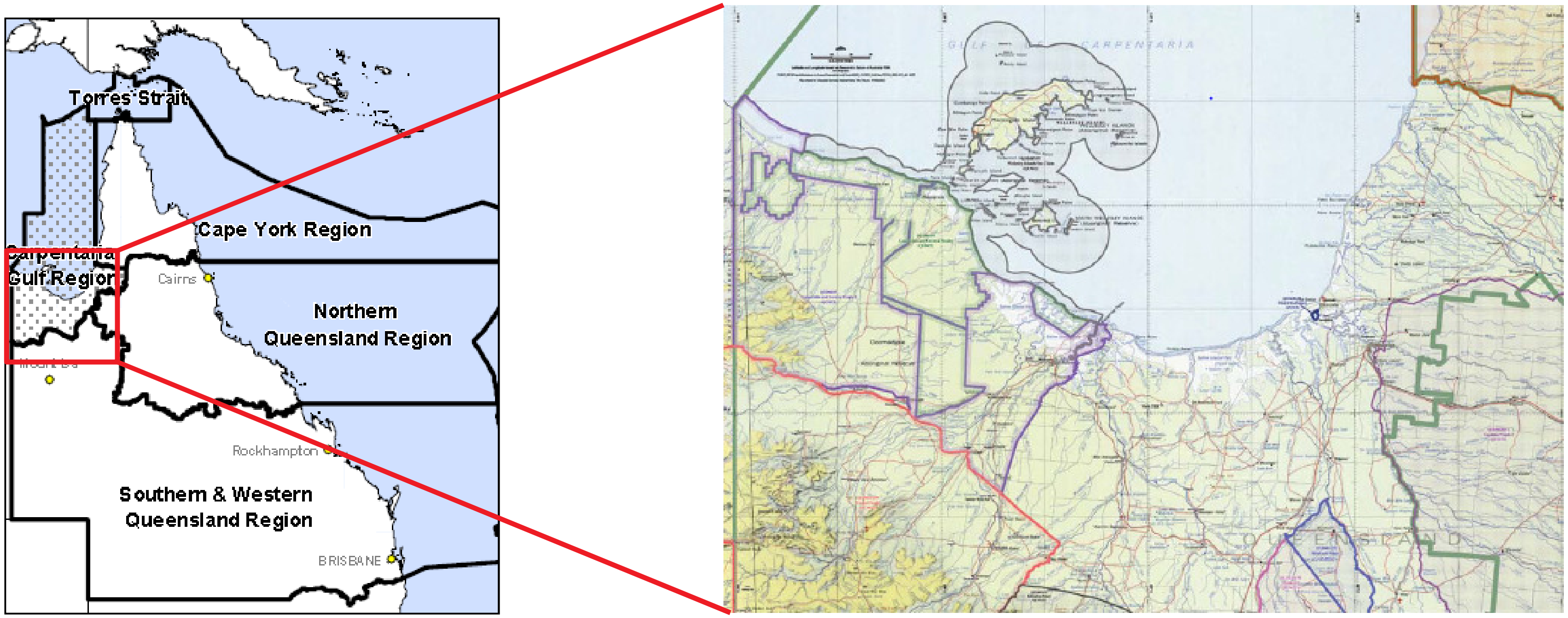
The Southern Gulf Region covers a relatively large area, a little over 100,000 km2, and is sparsely populated. Although less than 800 road kms from either Cairns or Townsville, the region appears to share similar economic characteristics with more remote regions in Australia.

The population is largely concentrated in two aboriginal communities, Doomadgee and Mornington Island and three general communities; Burketown, Normanton and Karumba, the region's port.

The spectacular natural environment of the Southern Gulf Region ranges from eucalyptus woodlands in inland areas through to lowland coastal plains, pristine wild rivers and seasonal wetlands to the rich marine resources of the Gulf of Carpentaria. Extensive mangrove forests, vast salt pans, estuaries, beaches, rocky shores, large seagrass beds, reefs and other marine areas typify the landscape.

The area is particularly significant for the extent and continuity of its wetlands and its importance as a rich breeding habitat for many waterbird and shorebird species, and encompasses many areas of high cultural significance to Traditional Owners.

Figure 1: Location of the Southern Gulf Region.



2. About the Study Area

MARKET AWARENESS

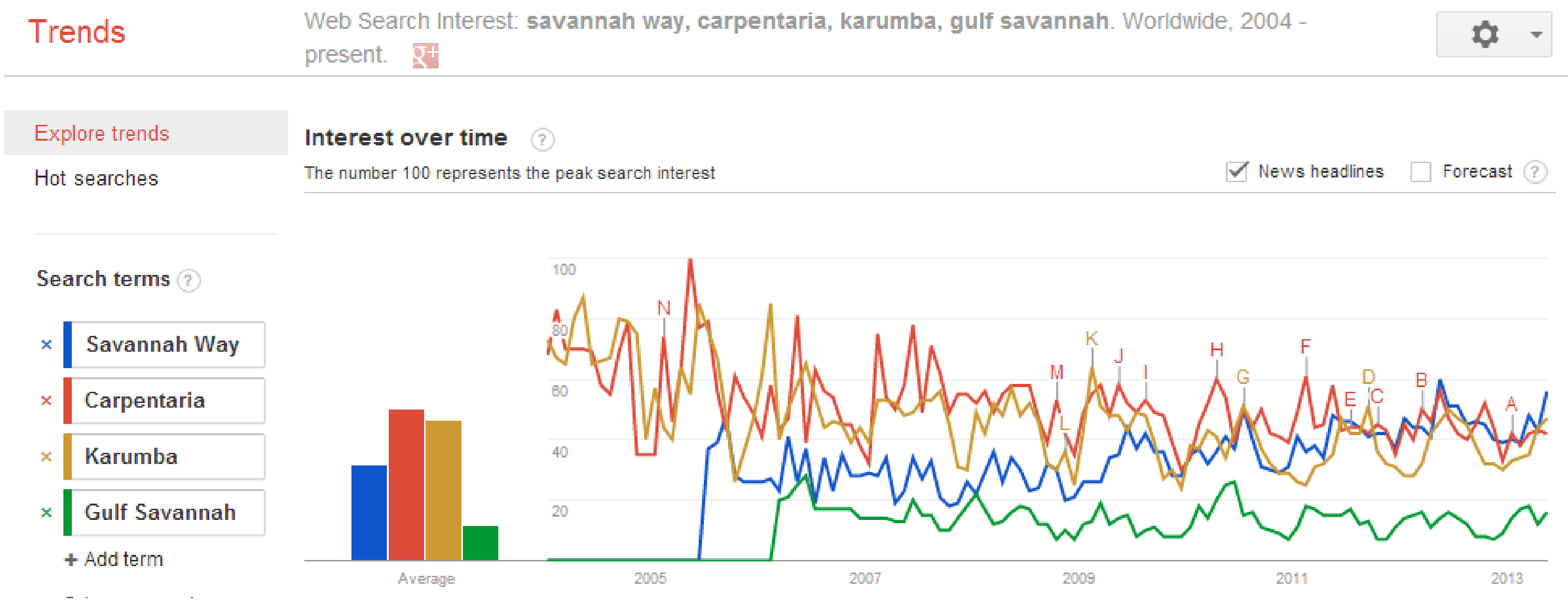
There is no current available advertising or brand tracking for the region and there is no well established consumer brand for the area of the Southern Gulf Region.

A Google Trends analysis shows an increase in Google searches for the term Savannah Way over the past eight years. This touring route was launched Internationally in 2006 and has a strong international market following, the primary search activity for this term comes from outside of Australia.

Domestically, 'Karumba' is searched slightly less than 'Carpentaria' but more than Savannah Way and Gulf Savannah. Renowned for its fishing experience, Karumba's popularity on the search engine displays that the market awareness for the town is possibly greater than that of the region itself.

There is potential for the region to leverage this position to further develop its fishing experiences and supporting experience offerings such as alternative accommodation options.

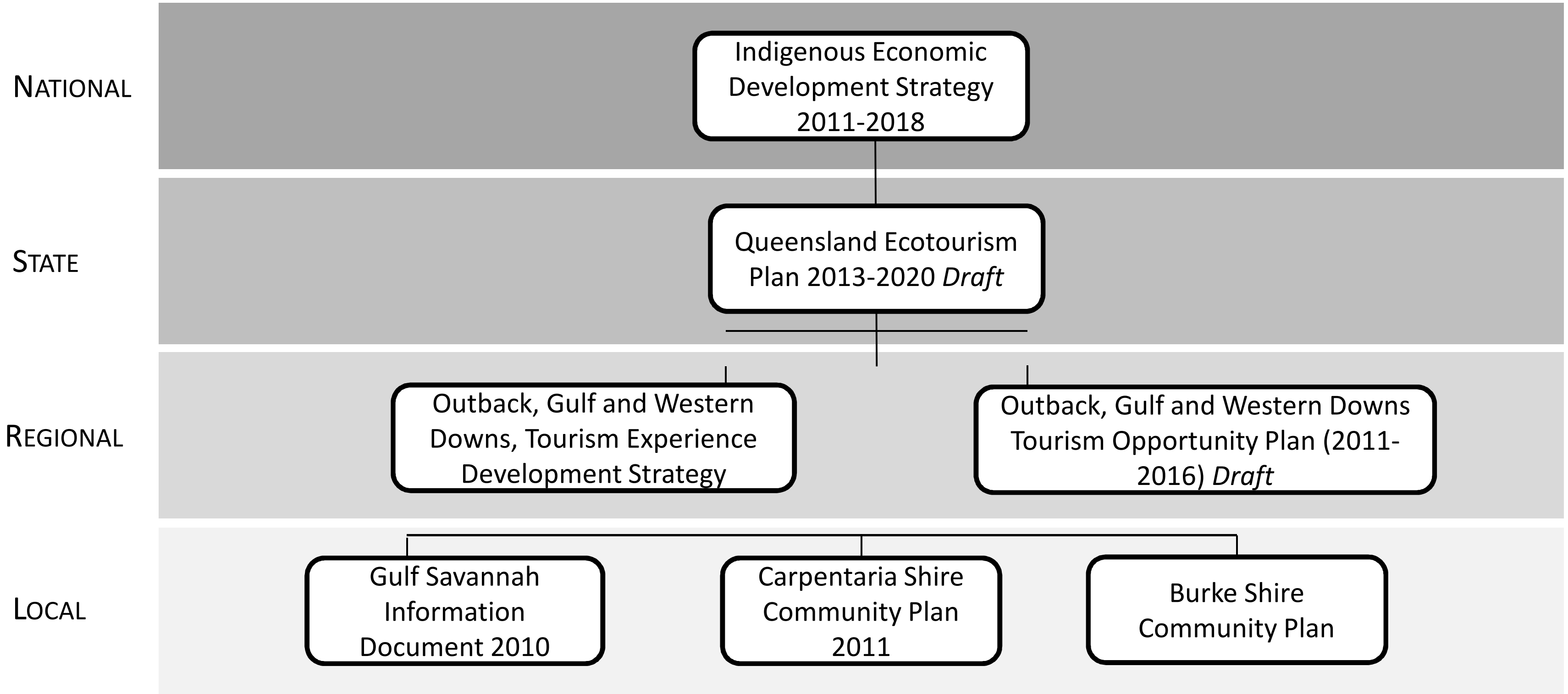
Figure 2: Google Trends on brand awareness



3. THE PLANNING CONTEXT

This Destination and Product Development Plan is a key element of the CLCAC's Business and Economic Development Program for the Southern Gulf Region as outlined in the CLCAC Social Investment Prospectus and the Indigenous Business and Economic Development Study recently completed with the assistance of Gordon Capital consultants. The Plan will be influenced by and leverage off broader national, state, regional and local strategic plans, as listed in Figure 3.

Figure 3: Planning Context



"Loved the Karumba sunsets, quiet tranquil Adels Grove. Very frustrated with… lack of souvenir outlets & something other than t-shirts."

Comments from Gulf Savannah Tourism Research Report 2013.

4. Opportunities and Challenges

The region provides a great opportunity for visitors to enjoy Indigenous, natural and cultural hero experiences. However, the limited existing tourism product offering will mean increasing the current tourism visitation figures will have its challenges.

However, with the appropriate foundation of support and planning the region could establish new tourism products which leverage off the existing indigenous, natural and cultural experiences of the region.

***Delta Downs** Photo by: Alison Fairy on Pinterest.com*

Opportunities	Challenges
• 'On country' experiences leveraging off CLCAC Indigenous Land and Sea Management Program. • Indigenous experiences that incorporate remote 'glamping' accommodation options and/or high end bush dining • Remote islands and sea country experiences • Cattle station experiences at Delta Downs Station • The unique natural cloud formation Morning Glory • Birdwatching tours • Cultural tours with Indigenous guides	• Small population base • Limited existing tourism product offering • Complex process to establish new tourism product • The current tourism market is relatively small, new product is needed to drive an increase in visitors • Road infrastructure in parts of the region is only accessible by 4WD in wet season • Seasonal tourism periods, the heat, wet season and potential flooding patterns slow visitation over summer months. • The high usage (24% of visitor nights) of free or 'bush' camping sites

"Happy – sunsets, scenery, wildlife. Unhappy – early closing shops & gas stations, roadworks."

Comments from Gulf Savannah Tourism Research Report 2013.

Part B: Market Analysis

Examines the current and future potential markets for the Southern Gulf Region.

5. Visitor Trends – Gulf Savannah

In response to the limited data available on tourism in the Gulf Shires, Gulf Savannah Development and Savannah Way Limited undertook a comprehensive survey of visitors to the Southern Gulf region in 2012.

With a sample size of 1,332, the survey classified the region as the Shires of Burke, Carpentaria, Croydon, Doomadgee, Etheridge and Mornington.

TARGET MARKET
According to the survey, the region had a total of **57,971** leisure based visitors in 2012. This visitation was dominated by the **domestic** market, travelling as a **couple** and **over the age of 50**, known as 'grey nomads'.

INTERNATIONAL VISITATION
International visitation makes up **4.9%** of the market (2,840 visitors), with the key international markets being **New Zealand**, the **United Kingdom** and **Germany**.

AT A GLANCE

11.5 nights
Average Length of Stay

64.4%
First Time Visitors

46%
Of visitors travelled to the western part of the region

$65million
Value of Tourism to the Region

TRANSPORT
The survey also highlighted that 91.6% travelled in 4WD vehicles, with the majority travelling different forms of transportable accommodation including 59.6% towing a caravan, 18.6% towing camping trailers, 10.8% in campervans and 8.7% in motorhomes.

The high percentage of 'caravanning' amongst the region's visitors is reflected in the accommodation types usage rates. The survey showed that 69% of visitor nights were spent in caravan parks or commercial camping grounds, with 24% of visitor nights being spent in 'bush' or free camping sites and only 5% of visitors choosing to stay in hotel/motel accommodation.

VISITOR EXPENDITURE
The average visitor spend per day is approx. $79.11 with accommodation ($20.86), fuel/vehicle maintenance ($19.60) and tours ($14.10) yielding the highest spend.

Figure 4: Type of Travel Party

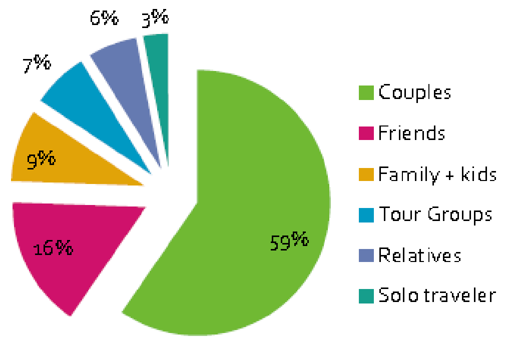


Figure 5: Visitors by Age Group

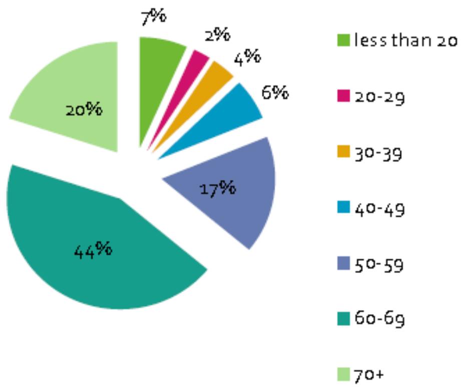
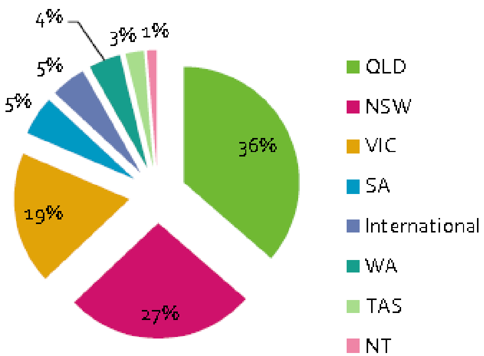


Figure 6: Origin of Visitors



5. Visitor Trends - Carpentaria

The following data has been drawn from Tourism Research Australia for the Carpentaria Shire Council area. The sample size for this data is around 60 visitors meaning these results need to be interpreted with caution as error margins may exceed 30%.

In 2012 (YE Dec), the Carpentaria region received an estimated **52,000 domestic overnight** visitors and **216,000 domestic visitor nights** (Figure 5). This is a **37% increase in visitors and 17% increase in nights from 2008**, however it should be noted that in the **past year** there has been a **22%** decline in **visitors**.

In terms of **international** visitors, the region attracted approximately **3,301 visitors** and **24,096** visitor nights this past year (YE Dec 2012) and this is a **35% decrease in visitors and 39% decrease in nights from 2008**.

The main purpose of visit to the region is **holiday or leisure (54%),** followed by business (31%). This is significantly higher than most other regions of Queensland (the business travel trend is exclusive to the domestic market). **Origin of domestic overnight visitors** is primarily **Queensland (81%)** followed by Victoria (8%) and New South Wales (4%). Of Queensland visitors, **34% originate from Brisbane**.

Average length of stay for domestic overnight visitors to the Carpentaria region is **4.3 days**. This is slightly **higher than the State average** of 4.1 days competitor Northern Peninsula at 3.4 days, but significantly **lower than competitor Cape York at 6.1 days.**

Arts, heritage and festival activities (52%) are the main activities undertaken in Carpentaria by **domestic** overnight visitors, followed by **sports or active outdoor activities** (46%), while **outdoor or nature activities** are the primary activities undertaken by **international** visitors (96%) (Figure 8).

Figure 7: Carpentaria Visitation Trends (2008-2012)

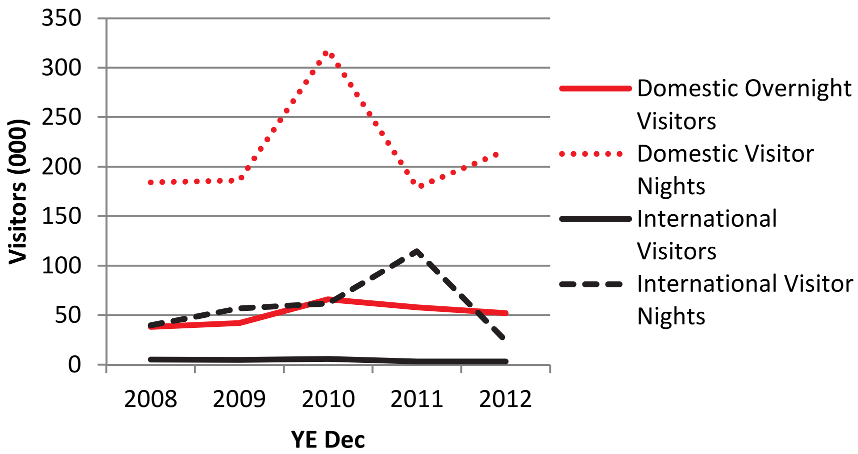
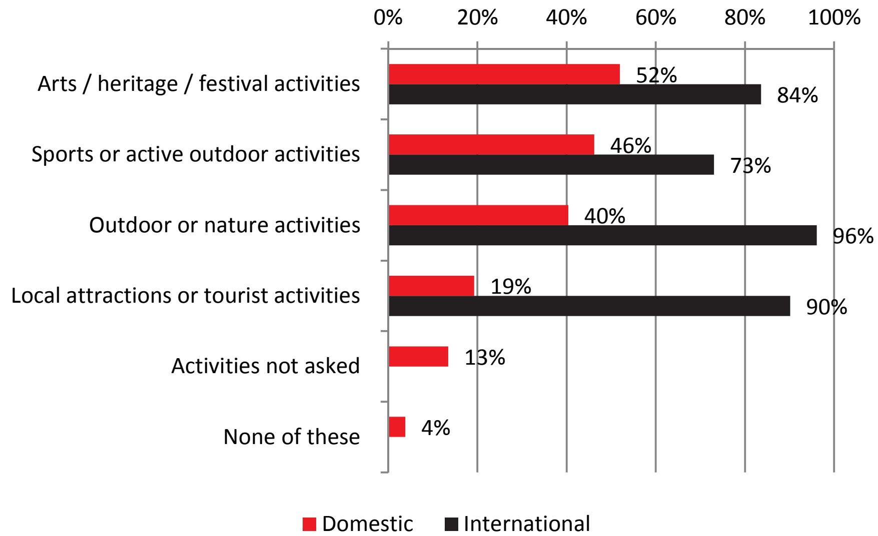


Figure 8: Carpentaria Activity Trends (YE Dec 2012)



Source: National and International Visitor Surveys, Tourism Research Australia

6. Emerging Market Trends

The regions potential for growth will depend on its ability to leverage a range of emerging market trends, these include:

- A trend towards **shorter holidays** with the majority of visitors now booking their accommodation prior to travel but leaving tour bookings to when they arrive.
- Growth into Australia has been from **Asia (especially China)** however there has been limited impact on the Southern Gulf Region as there is limited awareness and connection to the region.
- The **traditional markets (UK, US, and Germany) remain vital** to the volume and the dispersal of international visitors to the region.
- Growing volume and value of the **soft adventure** market globally, and significant competition in this market from South America, Asia, and Africa and the need to offer a unique product to this market.
- **Niche markets** represent the key growth sector for Northern Australia including growth in the **business market**, long-stay **fishing and 4WD** camping market.
- Continued growth and interest in the **health, well-being and spa market,** while much of the growth in new product has occurred in Asia there is strong growth and a growing expectation in Australia.
- **Redefining 'luxury'** a seminal piece of research by the Future Laboratory have ignited a global discussion about the future of 'luxury' and the desire for all markets (not just the rich) for a sense of luxury in the form of time and space to do what they want to do.

WHAT COMPETITOR DESTINATIONS ARE OFFERING

Here are just some examples of what products are being sold domestically and internationally as the 'new' experiences:

- ✓ **Luxury Safaris** including boutique accommodation on National Parks with the chance to see the 'Big 5' in the wild, or walk some of the most famous tracks. There has been a significant increase in product in the luxury safari space and likely more to come.
- ✓ **Parallel zip lining** a point-to-point zip lining experience that incorporates story telling/interpretation and can be experienced by all ages in Tasmania, Geelong and North Qld.
- ✓ **Heli-touring** where visitors are shown awesome landscapes and then dropped off at point inaccessible to a day walker on the volcanic slopes of Kauai, Hawaii.
- ✓ **Spa and Wellness** many domestic and international competitors are offering a range of spa and wellness experiences to build profile and maximise market appeal, and revenue potential.

7. What Motivates the Market

Tourism Australia's research on what our key international markets and the domestic consumer is looking for (see Figure 9) shows that a combination of nature, journeys and coastal experiences has the broadest appeal (although cities and Aboriginal Australia also rated well in some markets).

While it has not been done specifically for each region, it is possible to highlight key experiences from the markets the region mostly attracts (highlighted). The Southern Gulf Region attracts primarily Domestic travellers plus the more adventurous international markets including New Zealand, the United Kingdom and Germany. As shown in Figure 9 these visitors are looking for:

- ✓**Nature (#1 in 4 out of the top 6 markets)**
- ✓**Journeys (#1or#2 in 4/6 markets); and**
- ✓**Outback Australia (#2 or #3 in 3/6)**

While Indigenous experiences are desired by the majority of consumers they are ranked between 4-7 for the top markets. This is also the case for the domestic market who favour nature, journeys and outback in their top four (coastal lifestyle is #3)

The region needs to play to its strengths with Nature, Journeys and Australian Outback experiences.

Figure 9: Ranking of Experience Motivators for travel in Australia by market

Concept Ranking	AUSTRALIA	NEW ZEALAND	UNITED STATES	UNITED KINGDOM	FRANCE	GERMANY	CHINA	SINGAPORE	INDIA	JAPAN	KOREA	MALAYSIA
NATURE IN AUSTRALIA	**2**	3	**1**	**1**	**1**	**1**	**1**	**1**	**2**	**1**	**1**	**1**
AUSTRALIAN JOURNEYS	**1**	**1**	**2**	**2**	**3**	**2**	**2**	**2**	**1**	**2**	**2**	**2**
AUSSIE COASTAL LIFESTYLE	3	**2**	3	4	5	4	3	3	3	3	3	3
OUTBACK AUSTRALIA	4	4	4	3	2	3	4	4	4	4	4	4
ABORIGINAL AUSTRALIA	6	7	7	5	4	5	6	7	5	5	5	6
AUSTRALIAN MAJOR CITIES	7	5	6	6	6	7	7	5	6	7	7	5
FOOD AND WINE	5	6	5	7	7	6	5	6	7	6	6	7

8. Emerging Market Opportunities

Through an analysis of the current and future market trends the following market segments are considered potential growth markets for the region.

BUSINESS TRAVEL

As mentioned previously, **57,971** visitors travelled to the Southern Gulf Region in 2012. It is estimated that a further **9,000** visitors travelled to the region for the purpose of employment or business.

This business related visitation adds an extra **15%** on to the existing total visitation and should be targeted as major contributor to visitor expenditure within the region. Particularly, within analysis of accommodation options and supply.

NATURE BASED EXPERIENCE

Interest in nature-based tourism is growing across Australia, with Tourism Australia estimating in the year ending September 2012 there were approximately **3.4 million international nature visitors** to Australia (61% of all international visitors).

In that same year, there were 13.8 million domestic overnight trips (19% of all domestic trips) that included a nature-based activity. A survey conducted by Tourism Australia found that approximately 40% of respondents consider the 'world class beauty and natural environment as an important factor when choosing a holiday.

Sub-segments such as wildlife tourism have grown at 5%+ over the past five years in Northern Australia both in the domestic and international markets

WATER BASED EXPERIENCES

The Southern Gulf Region offers a number of water based activities including boating and fishing. Water based experiences are becoming increasingly popular, as they often encourage an active and healthier lifestyle, social interactions with family, friends or colleagues, have a favourable climate and cater for variable holiday durations.

Boating

Domestically participation in boating activities has been steady over the past 5 years with decline only being felt in the international market (decline of 38%) in the past five years. The nearby Top End (NT) receives approximately 150,000 visitors who participate in boating activities during their stay each year. On average 106,000 Domestic Overnight Visitors in the Top End participate in boating activities. This figure accounts for 14% of all Domestic Overnight Visitors to the Top End.

Fishing

The Southern Gulf Region is renowned as a fishing destination, while no reliable figures exist on the size of the market, the nearby Top End (NT) welcomes, approximately 120,000 Fishing Visitors per year, with these visitors contributing 1.1 million visitor nights to the region annually. Domestic Overnight Fishing visitors spend a total of 670,000 nights per year in the Top End. Domestic Fishing visitors stay, on average, 7 nights per year, compared to 6 nights for Domestic Overnight Visitors generally.

MARKET TRENDS

BOUTIQUE ACCOMMODATION

Today's new luxury travellers are increasingly seeking more high-impact experiences, (this trend is expected to continue) with more crossover between top-tier travellers and adventurous backpackers.

Introducing a four or five star accommodation product to the Southern Gulf Region will appeal to a growing niche within the domestic and international travel market – eco-luxury and safari.

With origins in the African safari industry, a demand has grown for a new form of 'luxury' where the markets seeks to strip back the attachments of a luxury holiday to maximise the sense of space and a return to the 'real' and to enable them to reconnect. **There is potential for the Southern Gulf Region to develop an eco-luxury safari.**

The newly built Crystalbrook Lodge is aimed at the luxury end of the market who are also keen fishermen and enjoy the outback experience. This is an example of the style of development that could be appropriate to reach this market in the Southern Gulf Region.

With a package price of $3,300 per guest for three nights (including flights from Cairns) it sets a new standard for luxury outback not seen in outback Queensland since Wrotham Park was closed and moved to the NT (see Wildman case study). A property similar to Wildman or Crystalbrook located in the Gulf could offer very similar experiences:

Wildman Wilderness Lodge is the perfect new launching point for exploring the natural beauty and open zoo of wildlife that is the Top End.

- Australian Gourmet Traveller Magazine (April 2011 issue)

CASE STUDY: Wildman Wilderness Lodge

Owned by Indigenous Business Australia and managed by Anthology Travel, Wildman Wilderness Lodge is located halfway between Kakadu National Park and Darwin.

Offering an extraordinary wetlands safari experience, the small-scale, high quality lodge features a variety of boutique and environmentally sensitive touring options, while providing the modern comforts of luxury accommodation and delicious cuisine.

Opening in 2011, the site for the Lodge was purchased by Indigenous Business Australia (IBA) in 2006. IBA then acquired the assets of the former Wrotham Park Station Lodge (WPSL) in 2009 with the view to relocate them to Wildman.

In addition to the WPSL facilities (central facilities, some power, water and sewerage infrastructure, management accommodation and the 10 cabins - habitats), 15 large safari tents were constructed at Wildman thereby creating a 25 room premium lodge experience on the Mary River flood plain, strategically located midway between Darwin and Kakadu and within the boundaries of the Mary River National Park.

Extensive engagement has occurred with NT Parks and Wildlife Service and local Aboriginal groups interested in providing cultural touring opportunities and in having Aboriginal people employed on the site. Though the relationship with Indigenous Business Australia, it is planned that Aboriginal groups from the local area will have an ownership stake in the property in the future.

8. Emerging Market Opportunities

INDIGENOUS EXPERIENCE SEEKERS

The domestic market that actively seek out indigenous cultural experiences has **increased since 2008** to 2,609,000 visitors. This signifies a **28% increase over the past five years and an 11% increase since last year**. This is in line with an overall **increase in the total domestic overnight market**. This past year (YE Dec 2012) domestic overnight Indigenous tourism visitors represented 3.5% of the total domestic market.

Domestic overnight Indigenous experience seekers **spent more per trip than other visitors** ($1,009 compared to $671). This was largely due to the **longer length of stay of Indigenous experience seekers** (5.7 nights) compared to other visitors (3.8 nights). They tend to be **parents** (33%) and **older persons** (32%). Domestic visitors who take part in Indigenous tourism activities are more **likely to travel as a couple or family group.**

The most popular Indigenous activities for domestic visitors were: **attend festivals or fairs or cultural events** (87%), and experience aboriginal art or craft and cultural displays (8%).

This past year (YE Dec 2012), 703,219 (**12%)** of International visitors to Australia **participated in an Indigenous activity**. Key international target markets including **France, Germany, India and China consider Indigenous experiences to be a key driver for visitation.** The most popular Indigenous activities for international visitors were: **experience aboriginal art or craft and cultural displays** (73%) and visit an aboriginal site/community (35%).

"Australia's Indigenous culture sets it apart from countries around the world. The culture and its relationship with our extraordinary landscapes, combine to provide travellers with a truly unique experience. There is no question that such an experience is becoming more and more important to Australians and international visitors planning to explore this vast country.

An Indigenous experience is now an essential element of the Australian tourism experience."

Aden Ridgeway, Executive Chairman,
Indigenous Tourism Industry Advisory Panel

Source: National and International Visitor Surveys, Tourism Research Australia
Source: 'Experience Seeker' Target Market Experience Breakdown, Tourism Australia

Part C: Product Opportunities

Examines the current and future potential product development needs and opportunities.

9. Product Audit

The Southern Gulf Region and the CLCAC region is an established tourism destination in terms of having a long history of welcoming visitors, however the region has a limited range of tourist-oriented facilities. The key tourism oriented town of Karumba offers the widest range of facilities followed by Normanton and then Burketown.

KEY INFRASTRUCTURE

Aviation services and infrastructure: The region is serviced by Skytrans. A number of smaller charter companies also fly in the Region. Airstrips are located in Burketown, Normanton, Karumba, Mornington Island and Doomadgee. Delta Downs Station has a private air strip. This infrastructure and associated services will be central to destination and product development planning.

Road networks: Significant sections of the road network are now sealed. The road between Burketown and Normanton is only trafficable by 4wd in the wet season as are many dirt roads in the Gulf.

Road and aviation infrastructure has the potential to combine, in ways not previously done, for new products providing greater flexibility to customers and at different times of the year e.g. fly/drive experiences, fly/fly remote fishing or wildlife experiences. The Savannah Way has international and national appeal already.

Marine infrastructure: The boat ramps and jetties in Burketown, Normanton and Karumba are all suitable for use by small commercial vessels for niche river/water based tours. Karumba as the major port in the Gulf services the MMG Century mine and the commercial fishing industry and is capable of servicing reasonably large boats such as charter yachts.

KEY TOURISM ASSETS

Wildlife - The Region has an extensive and diverse array of native wildlife including birdlife, crocodiles, wallabies, fish and other marine life. Seasonal wildlife experiences will be a key input into destination and product development planning.

Diverse landscapes - The natural environment of the region ranges from eucalyptus woodlands in inland areas through lowland coastal plains, wild rivers and seasonal wetlands to the marine resources of the Southern Gulf Region. Extensive mangrove forests, vast salt pans, estuaries, beaches, rocky shores, large seagrass beds, reefs and other marine areas typify the natural environment.

Rich Indigenous Culture - An equally rich and diverse culture exists with strong connections to sea and country just waiting to be shared. As indicated earlier this feature coupled with the diverse and spectacular landscapes forms the backdrop for new and innovative Indigenous tourism products.

PRODUCT GAPS/OPPORTUNITIES

The following gaps and opportunities were identified in the Tourism & Events Queensland, Experience Development Strategy:

- **Accommodation**: self contained, 3 – 4 star, remote camping (national park, cattle farm), workers accommodation
- **Savannah Guides** needs to grow
- **Morning Glory** event or operator
- **Helicopter** and Air charters for Morning Glory or Lawn Hill
- **Fossicking tours** in Georgetown / Agate Creek
- **Birdwatching** tours
- **Learning experiences/study tours**
- **Motel and Restaurant** (4-star venue)
- **Indigenous interaction**

CASE STUDY: Barramundi Discovery Centre

The Karumba Barramundi Discovery Centre Extension has been recognized in the Outback, Gulf and Western Downs Tourism Opportunity Plan, as a catalyst tourism project for the Southern Gulf Region. The project has been identified for its capacity to drive ongoing growth and development of tourism in the region.

In it's current capacity, the Centre essentially performs dual roles, firstly as a tourist centre and also as a fingerling growing facility responsible for the breeding and stocking of barramundi into the waterways and rivers of the Southern Gulf Region.

The Discovery Centre offers a range of displays and tours that inform and educate tourists on all things 'barramundi' and allow visitors the opportunity to view the feeding of barramundi breed stock.

The Centre has played an essential role in the regional economy, breeding in excess of 1 million fingerlings over the last 15 years.

There is great potential to re-develop the Centre into a larger attraction to draw more tourists and provide a more reliable source of income to the regional economy.

An upgrade of facilities and increased development funding and operational resources is considered to be of priority to ensure the Karumba Barramundi Discovery Centre continues to operate as a sustainable business with a strong financial base whilst representing the character and appeal of the Southern Gulf Region.

FUTURE OPPORTUNITY:

The Normanton Monsoon Centre has also been identified as a potential catalyst project for the region providing an opportunity to feature Indigenous history and culture.

10. Identified Product Development Opportunities

A number of tourism and economic development related studies of the broader Gulf and Outback have identified some clear product development opportunities for the region, these include:

Indigenous Economic and Business Development Opportunities in the Gulf, *Gordon Capital draft report for the CLCAC* (2012).

This report provided a rapid assessment of the existing economy, including barriers to investment, constraints and opportunities.

It was identified that tourism has considerable potential but currently has a lack of supporting infrastructure:

- Tourism is a growth industry in the region although supporting infrastructure is largely under-developed, particularly in Normanton and Burketown.
- With sealed roads from the south and east into Normanton, the region is easily accessible from major population centres in east and south eastern Australia.
- Infrastructure is better established at Karumba, which is a destination point for recreational fisherman, however, it is seriously lacking at Burketown and Normanton, which are compulsory overnight stops for road warriors.

Report recommends that tourism be advanced as a priority.

Gulf Savannah Development - *Regional economic profile, 2010*.

Identifies a range of opportunities for expanding the tourism sector in the region including:

- Backpackers, bird watching, farm-stays
- Indigenous tourism
- Family holidays out of Cairns /Townsville
- Week-end breaks for mining workers from Mt Isa
- Savannah Way accommodation packages
- Events packaging
- Products that attract people during the wet season
- Tourism support businesses e.g. cafés, internet kiosks
- Diversification in provision of accommodation.

Queensland's Outback, Gulf and Western Downs Tourism Opportunity Plan 2011-2016 *Tourism Queensland (draft)*

Identified the **Normanton Monsoon Centre** development and **Karumba Barramundi Discovery Centre** as the catalyst tourism projects for the Carpentaria Region.

Queensland Indigenous Tourism Product Manual (2010/2011) & Aboriginal and Torres Strait Island Tourism Experiences (2012), *Tourism Queensland*

Both reports identified there was 'No Indigenous product available in the Gulf Region.'

Industry has identified that there is a clear gap of Indigenous product within the region and it also notes that there is substantial demand for quality indigenous products.

10. Identified Product Development Opportunities

DESIRED EXPERIENCES

Visitors surveyed through the 2012 Gulf Savannah visitor research were asked what tours and activities they would be interested in, if they were offered in the region. Table 1 shows that day tours to Mornington Island , cattle station tours and 1hr wildlife tours had the highest ranking response with 44.1%, 42.7% and 39.2% respectfully.

Table 1: Level of Interest in New Product Opportunities

	Interested	Maybe	Not Interested
1hour indigenous tour @ $30	32%	35.1%	32.9%
½ day indigenous tour @ $100	18.7%	30.6%	50.7%
Full day indigenous tour @$200	7.8%	16.8%	75.4%
1 hour wildlife tour @ $30	39.2%	38.3%	22.5%
½ day wildlife tour @ $100	25.8%	37.1%	37.1%
Full day wildlife tour @ $200	11.2%	19.7%	69.1%
Farm stays	31.7%	32%	36.3%
Cattle station tours	42.7%	35.1%	22.2%
Aerial tours of the Gulf	38.9%	35.5%	25.6%
Day tours to Mornington Island/Wellesley Islands	44.1%	33.7%	22.2%
Pig Hunting	13.6%	8.9%	77.5%
Visits to historical sites or building	52%	39.3%	8.7%

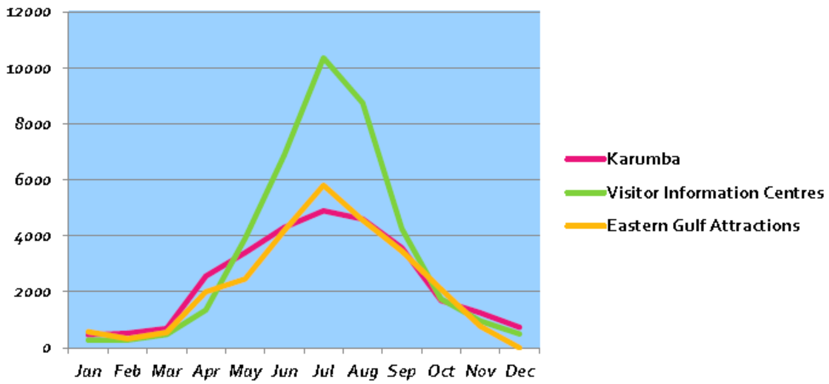
11. ENABLERS OF SUCCESS

ACCOUNTING FOR SEASONALITY

The extreme weather patterns over the summer months in the Southern Gulf Region causes a flow on effect to the region's visitor numbers. The heat, wet weather and flooding patterns from November through to March, provide challenges for visitors including road accessibility.

There is a pronounced shoulder period of April and May as well as September and October, this shoulder period has the potential for growth as road accessibility is reasonably good during this time. (Figure 10). It is essential that this is considered in the business case for any new enterprise.

Figure 10: Visitor Numbers Showing Seasonality



"My experience with niche product, especially one that has a seasonal window, is that it takes a few years of consistent presence in market to see results. If you aren't consistent you can't rely on future bookings."

USA Wholesaler.

BUSINESS SUPPORT PROGRAMS AND STRATEGIES

The key to creating a successful and sustainable Indigenous tourism destination, relies on the region's ability to develop quality and meaningful Indigenous product.

The major motivator for visitors seeking an Indigenous experience is connection. Connection with an ancient culture, connection with a landscape and ultimately connection with Indigenous people.

Getting new Indigenous product or revitalising existing product can be a labour intensive and costly process. There are a multitude of programs offering assistance and guidance to regions or bodies who are interested in navigating this complex process.

Ensuring that the recommendations of this report align with offered programs will highlight avenues for the CLCAC to consult in the future which will provide guidance and even financial assistance to help develop quality Indigenous product with the region.

CENTRAL ABORIGINAL EXPERIENCES (ALICE SPRINGS)

The Central Aboriginal Experiences (CAE) Tourism Hub was a Commonwealth funded tourism hub, based in Alice Springs. The role of the Hub was to develop and expand the capabilities of Aboriginal owned businesses offering Indigenous tourism products throughout Central Australia. While the model faced a number of challenges its key successes were:

- an increase in commercial market awareness via simplified distribution and conversion channels,
- creating further market opportunities for small Indigenous owned businesses.
- Broadening the variety of Indigenous experiences available, demonstrating the region's culture including art workshops, cultural awareness tours, sacred sites and art galleries.

CASE STUDY – JUMA AMAZON LODGE, BRAZIL

The Juma Amazon Lodge is a luxury accommodation comprised of twenty bungalows and is located three hours from Manaus, Brazil, in a part of the Amazon that remains relatively untouched. The lodge has been designed to be completely integrated into the surrounding rainforest, with building materials locally sourced and consistent with those used to build native houses in the area.

The lodge offers numerous exhilarating nature-based experiences including educational jungle walks, alligator spotting, overnight stays in the rainforest, piranha fishing and meeting some of the native Amazonian people.

Guests also have the option to take part in authentic Indigenous experiences through activities such as the craft workshop, where native guides teach them to make local crafts from açaí seeds, fish scales and babaçu leaves.

Local guides also can take guests to Meeting of the Waters – one of the various natural wonders in the area – where the Solimões River and Negro River run side by side without actually mixing. It is these unique opportunities where visitors are informed and engaged by locals to better understand the importance of the land to the local culture and its survival.

'Juma Lodge does a great job in making one aware of the ecosystem and how important it is for preserving what remains of the Amazon and nature!'

- TripAdvisor

WHY ARE WE BEST PRACTICE?

- We offer **authentic and engaging Indigenous experiences** with Amazonian natives who **provide a new perspective** to visitors on the land and how it is used
- The Lodge is designed, built and operated with a **sustainability** focus to help **ensure the survival of our environment and local community** – the two fundamental components of our experience delivery

Source: http://www.jumalodge.com/

12. Competitor Analysis

Tourism Australia and Indigenous Business Australia (IBA) have partnered to establish the ***Indigenous Tourism Champions Program*** (ITCP). This program aims to build a reputation of reliability and consistent quality in service delivery for the Indigenous tourism sector. It provides a framework for the selective marketing of businesses which have met a set of criteria, ensuring that the businesses being promoted by Tourism Australia can meet the needs and expectations of trade and the international markets.

Tourism Australia is responsible for marketing the Champions (listed below) and IBA provides mentoring support and funding assistance to selected Indigenous owned businesses. While many will be partners to new businesses in the CLCAC area, each has the potential to be a competitor:

Aboriginal Owned Enterprises

- Aboriginal Cultural Tours – South Australia
- Banubanu Wilderness Retreat
- Batji Tours
- Dreamtime Southern X - The Rocks Dreaming Tour
- Gagudju Dreaming
- Harry Nanya Tours
- Ingan Tours – Spirit of the Rainforest Tour
- Kooljaman at Cape Leveque
- Koomal Dreaming
- Kuku Yalanji Cultural Habitat Tours
- Mossman Gorge Centre
- Nitmiluk Tours
- Northern Territory Indigenous Tours
- Nura Diya – Taronga Zoo
- RT Tours Australia
- Sea Darwin
- Shark Bay Coastal Tours
- Stradbroke Island Holidays
- The Kodja Place

Tjapukai Aboriginal Cultural Park
Tribal Warrior Association
Uptuyu Aboriginal Adventures
Walkabout Cultural Adventures
Waradah Aboriginal Centre
Worn Gundidj
Wula Guda Nyinda Eco Adventures

Aboriginal Experiences (not Aboriginal Owned)

Currumbin Wildlife Sanctuary
Daintree Eco Lodge & Spa
Davidson's Arnhemland Safaris
Kakadu Cultural Tours
Kimberley Wild Expeditions
Lord's Kakadu and Arnhemland Safaris
Royal Botanic Garden Sydney
The Bama Way - Aboriginal Journeys (Adventure North Australia)
Tiwi Tours – Aussie Adventure
Tri State Safaris – Mutawintji Eco Tours

The **Tourism and Events Queensland also have an Indigenous Product and Industry Development Program**. This purpose of program is to assist Indigenous tourism products to progress through the stages of business development with a view to growing the number of high quality, mature experiences available to both the domestic and international markets.

This program can assist with devising the needs and aspirations of Indigenous tourism business, provision of information on existing general development and marketing programs, financial assistance for participation in workshops, events and programs, relationship building with industry stakeholders, and insights into Indigenous businesses.

13. Hero Experiences

A 'hero experience' is an experience that is iconic and represents the essence of a destination. An experience that sets the region apart and is normally considered something that the region can deliver better than any other destination.

The Southern Gulf Region is full of rich experiences for visitors to enjoy. As acknowledged in Visitor Trends, the current experiences the region offers visitors are listed below.

ACTIVE OUTDOOR	NATURE
• Lawn Hill National Park • Island fishing lodges • Fishing charters • Station stays • Savannah Guides and Tour Guides	• The Barramundi Discovery Centre • Morning and Sweers Islands • The Gulf • Barramundi Restocking • Crocodiles

CULTURE, HERITAGE & ARTS	EVENTS
• The Miyundi Arts and Craft Centre • The Gulflander train • The Savannah Way drive route • Normanton Aboriginal Art	• Normanton Rodeo • Normanton Barra Classic • Cairns to Karumba Bike Ride • World Barramundi Fishing Championship, Burketown • Karumba Anglers Classic • Karumba Golf Open • Burketown Arts & Crafts Show • Burke & Wills Campdraft, Normanton

OUTBACK BY THE SEA *(Tourism & Events Queensland, Experience Development Strategy)*
The Gulf Savannah is safari country with vast golden savannah grasslands abounding with wildlife, endless bushland and wide open spaces, spectacular flora and fauna, changing landscapes, World Heritage fossil fields, historic towns, Aboriginal rock art, gemstones and gold. It has some of the best fishing in the world and the natural phenomena of meandering river systems, hot springs, lava tubes and deep gorges full of wildlife.

Hero Experiences (Cont.)

Food and Wine
- Local crab, prawns, barra
- Food with a view
- The simple pleasure of a cold beer, BBQ and a bucket of prawns
- Watching sunset over the water
- Campoven cooking at Undara

GULF/SAVANNAH EXPERIENCES

In 2011, Tourism and Events Queensland (TEQ) commissioned a Tourism Experience Development Strategy for the Outback, Gulf and Western Downs destinations. Five key hero experiences were identified for the region.

This Strategy is part of the big picture planning for the future of the tourism industry within the entire region, which:

- Established the region's **competitive advantage**
- Aligned to the **TEQ and Tourism Australia Experience Marketing**
- Fed into the **Tourism Opportunity Plan**
- Informed the **Regional Marketing Plan**

The Gulf Savannah was identified in this Strategy as an experience precinct, which encompasses the Carpentaria Shire, Croydon Shire, Etheridge Shire and Burke Shire.

Nature Encounters
- Birdlife everyday
- Crocodiles – sightings, cruise
- Turtles, whales, dolphins, dugongs
- Wet / dry season
- Open plains
- Outback by the sea
- Volcanoes/Lava Tubes
- Savannah landscapes
- Volcanic landscapes
- Wetlands – birdlife, up close, diversity, access by air
- Hand-feed a Barramundi
- Morning Glory cloud formation
- Explore the beauty that is Cobbold Gorge

Journeys/Adventure
- Savannah Way and alternate routes
- Crocodile spotting
- Trekking / bushwalking
- Fishing – Rivers, Gulf, Islands
- Heli-fishing
- Sailing into the Gulf
- Sunsets
- Island fishing experience

Outback Queensland Lifestyle
- Interacting with friendly, laid-back locals
- Cattle stations
- Rodeos and campdrafts

Aboriginal /Cultural Heritage
- Normanton Aboriginal Art
- Mornington and Sweers Islands

New Product Opportunities

For the Southern Gulf Region to drive tourism growth, investment needs to be made into new tourism products. The abundance of pristine nature based experience and the high density of Indigenous culture provides a great opportunity to leverage the region's experience offering in the tourism market.

Leveraging authentic experiences that are synonymous with the region, will help to build 'hero experiences' that can be useful for future marketing activities, including building a brand presence for the region.

Three core experiences to the region's culture include;

- **Cattle station** experiences
- Remote **island and sea country** experiences
- **'On country**' experience leveraging the highly acclaimed CLCAC Indigenous Land and Sea Management Program and Rangers, focussing on seasonal **wildlife** and **nature** based experiences

The respondents surveyed in the *Gulf Savannah Tourism Research Report 2013* were asked what type of new products they would be interested in. The results demonstrated the largest demand for **cattle station** tours (**42.7%** interested), followed by day trips to **Mornington/Wellesley Island** (**44.1%** interested) and one hour **wildlife** tours (**39.2%** interested).

"More free camping, not necessary to have toilets but need places to get off the road. Very happy friendliness. All in all great Aussie experience. Would come again and recommend to others."

Comments from Gulf Savannah Tourism Research Report 2013.

SHORT TERM

- Half day "on country" tours utilising the CLCAC Indigenous Ranger program with a heavy focus on seasonal wildlife and nature based experiences. Including; fishing, turtle, crocodile monitoring, wildlife encounters, traditional foods and cooking experiences
- Tour options of Australia's only Aboriginal owned and run working cattle station (Delta Downs Station), including, site tours, camping, wild pig hunting (feral animal control) and photography

• MEDIUM TERM

- Packaging experiences from half day to three day tours including
  - Extensions of the above experiences
  - Adventure quad bike and helicopter/ultra-light aircraft tours
  - Remote safari experiences living off the land
  - Wet season Fly In/Fly Out fishing tours
- Low key accommodation such as camping and caravan accommodation
- Establishment of support businesses including catering
- Events and festivals attraction

• LONG TERM

- Joint venture operations on the Mornington Island and Sweers Islands fishing lodges including exclusive sea country fishing (existing fishing lodge leases on native title lands expire in the near future)
- Additional accommodation including 4 star safari style tent houses, more appropriate camping facilities, possible acquisition of and retro-fit an existing motel / building as an Indigenous owned and run operation

Part D: The Right Way Forward

Define the vision, goals and priorities for the short, medium and long-term.

4. Proposed Vision and Goals

PROPOSED VISION:

"Provide Australia's most engaging Indigenous experience for visitors to the Southern Gulf Region."

PROPOSED MISSION:

Develop a suite of quality Indigenous product, that promotes authentic experiences with the nature and the unique culture of the Southern Gulf Region.

Developing a tourism destination requires planning and can be complex. In order to deliver real outcome for the Traditional Owners and the broader Southern Gulf Region, two catalyst projects have been identified.

These projects can be actioned immediately and will have the greatest impact on the development of an Indigenous tourism product offering.

1. Gangalidda On Country Tours – Burketown Region

Opportunities from the project would include Indigenous river and land based tours out of Burketown, showcasing innovative and award winning conservation management that combines traditional knowledge with contemporary science. Seasonal wildlife experiences, such as crocodile and turtle monitoring, and adventure experiences, for example quad bike tours of the salt plains, are other opportunities to be explored.

2. Delta Downs Cattle Station – Southern Gulf of Carpentaria.

The project would aim to promote the experience of a wholly Aboriginal owned and run cattle station with possible inclusions featuring camping or 4-Star safari style accommodation, wildlife management tours, exclusive remote coast experiences, bird watching and/or fishing and wildlife experiences.

CATALYST PROJECTS

Gangalidda 'On Country' Tours

The Gangalidda People hold exclusive native rights and interests over 5,810sq km of land and waters in the Carpentaria region. This includes pristine river systems, extensive areas of natural woodlands, stunning salt plains and coastal areas of great culture significance and creating the key ingredients for innovative tourism development.

Delta Downs Cattle Station Tours

Delta Downs is one of Australia's top cattle stations stretching 400,000ha with 120km of pristine coastal frontage with a spectacular outback setting and only 80km from Normanton.

"In the future we want to be a part of economic development. We want to remove ourselves from the welfare that exists throughout the Gulf, however all economic development needs to be sustainable so that it benefits future generations and the country is looked after"
Murrandoo Yanner of the Gangalidda Peoples.

10. Supporting Recommendations

- Build the profile of new businesses through cooperative marketing with Skytrans holidays including the “Destinations Guide” and features in the in-flight magazine.
- Engage in the Indigenous Champions Program (on acceptance) and ensure mentors in the Indigenous Business Advisory and Support Services have the skills and experience to support the growth of local Indigenous owned tourism enterprises and encourage greater participation in the marketing and distribution channels .
- Leverage the Remote Community and Jobs Program (RJCP) service providers to access training and development opportunities for new tourism enterprises.
- Above 2 points relate to recommendation ‘Develop the incubator model with key partners’ as per the ‘INDIGENOUS ECONOMIC AND BUSINESS DEVELOPMENT OPPORTUNITIES IN THE GULF OF CARPENTARIA REGION - SUMMARY REPORT’ prepared by Gordon Capital.
- Adopt a social media and publicity approach to new product marketing in the short to medium term.
- Expand the already successful Rangers Program to offer tourism ranger experiences including short and half day tours, fishing tours, and meet the ranger educational experience for school and university groups.
- Focus new experiences on nature with a deeper understanding coming from traditional ecological knowledge.

***Skytrans Holidays 2013 –** Destination Guide Queensland, Australia*

6. Recommended Action Plan

The key actions have been allocated both responsibilities and a timeline based on Immediate (2013), Short term (2014-15), Medium Term (2015-16) and Long Term (2017-20)

Action	Responsibility	Timing
Recommend a Tourism Advisory Panel be formed and seek nominations for participation from current CLCAC Board Members, Traditional Owners, Local Government Representatives and local tourism operators.	• CLCAC • Local Tourism Operators • Local Government Representatives • Traditional Owners	Immediately
Meet with the identified stakeholders of the Destination and Product Development Plan to discuss and gain support for the vision, mission and objectives and ensure they are aware of their role to participate in the Actions output	• CLCAC • Key Stakeholders	Immediately
CATALYST PROJECT 1: Gangalidda 'On Country' Tours, prepare a business case for the proposed product idea and investigate funding channels supporting the development of the product.	• Traditional Owners (Gangalidda People) • CLCAC Destination Advisory Panel	Short Term
CATALYST PROJECT 2: Delta Downs Station Tours, prepare a joint venture investment prospectus to develop the Delta Downs as an accommodation and tour facility.	• Traditional Owners • Station Management • CLCAC Destination Advisory Panel	Short Term
Engage with Savannah Guides and Savannah Way Ltd to establish a Savannah Guide Station with an indigenous ranger in the region (something not currently offered on the Queensland leg of the journey).	• CLCAC • Savannah Guides • Savannah Way Ltd	Medium Term
Develop a Burketown Indigenous experience through short 2-3 hour walking tours through the town and cultural sites.	• CLCAC • Traditional Owners	Medium Term
Work with established networks and stakeholder groups to build a mentor program for start-up tourism enterprises.	• CLCAC (Tourism Advisory Panel) • Local operators	Medium Term
Seek local support to use a vessel for trial river tours in the 2015 winter peak season.	• CLCAC Tourism Advisory Panel	Medium Term

6. Recommended Action Plan (Cont.)

Action	Responsibility	Timing
Prepare a feasibility study for the Normanton Motel project referenced in the CLCAC Economic Development report.	• CLCAC	Medium Term
Engage with all levels of Government to seek funding for a Wetlands boardwalk in Normanton, to increase length of stay and to be used for boat transfers from Karumba.	• CLCAC • Carpentaria Shire Council • Queensland Government	Medium Term
Investigate the feasibility of a fishing tourism venture, that includes boat and heli-touring with local indigenous guides.	• CLCAC • Local Tourism Operators • Traditional Owners	Medium Term
Partner with Skytrans to offer daytrips and guided walk packages to Mornington Island to the captive market in Karumba during the wet season, withhold from offering this all year to add to the exclusive wet season experience.	• CLCAC • Skytrans	Long Term
Prepare a business model for voluntourism, to increase the visitor's connection and engagement in the destination.	• CLCAC	Long Term
Investigate the feasibility of establishing a Morning Glory tour targeting international visitors, backed by research partnership that provides likelihood of seeing the cloud formation with favourable conditions.	• CLCAC	Long Term
As new tourism product comes to fruition, begin the process of the establishing a destination brand or presence that represents the region's hero experiences.	• CLCAC • Local tourism operators • OQTA • Tourism Queensland	Long Term