



# Francois Peron Heritage Precinct

TOURISM BUSINESS OPPORTUNITY ANALYSIS PROJECT

Report to

**Tourism WA**

December 2021



W E S T E R N  
A U S T R A L I A

### Document Control

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# Abbreviations

<b>ABS</b>	Australian Bureau of Statistics
<b>ACC</b>	Australia's Coral Coast
<b>CAB</b>	Carnarvon Artesian Basin
<b>COGS</b>	Cost of Goods Sold
<b>Convention</b>	World Heritage Convention
<b>DBCA</b>	Department of Biodiversity, Conservation and Attractions
<b>DPAW</b>	Department of Parks and Wildlife
<b>EOI</b>	Expression of Interest
<b>FPHP</b>	Francois Peron Heritage Precinct
<b>FPNP</b>	Francois Peron National Park
<b>GALMS</b>	Gascoyne Aboriginal Land and Sea Management Strategy
<b>GDC</b>	Gascoyne Development Commission
<b>GWl</b>	Global Wellness Institute
<b>LTPS</b>	Shire of Shark Bay Local Tourism Planning Strategy 2014
<b>MAC</b>	Malgana Aboriginal Corporation
<b>Masterplan</b>	Masterplan Concept
<b>PCC</b>	Physical carrying capacity
<b>PESTEL</b>	Political, economic, social, technological, environmental, legal analysis
<b>Project</b>	Francois Peron Heritage Precinct Tourism Business Opportunity Analysis Project
<b>Project Team</b>	Executive Compass, Economic Transitions & Creative Spaces
<b>REMPAN</b>	Regional Economic Modelling and Planning
<b>Report</b>	Francois Peron Heritage Precinct Tourism Business Opportunity Analysis Report
<b>RFQ</b>	Request For Quote
<b>Shire</b>	Shire of Shark Bay
<b>Tourism Strategy</b>	Gascoyne Development Commission Tourism Strategy 2014
<b>SWOT</b>	Strengths, weaknesses, opportunities, threats
<b>TA</b>	Tourism Australia
<b>Tourism WA</b>	Tourism Western Australia
<b>TRA</b>	Tourism Research Australia
<b>UNESCO</b>	United Nations Educational, Scientific and Cultural Organisation
<b>WA</b>	Western Australia
<b>WAITOC</b>	Western Australian Indigenous Tourism Operators Council
<b>YMAC</b>	Yamatji Marlpa Aboriginal Corporation

## Section 1. Executive Summary

Francois Peron National Park is located within the Shark Bay World Heritage Area in the Gascoyne region of Western Australia. It is a place of enormous environmental significance as well as being a visually stunning location. The marine and terrestrial environments both have a significant amount of wildlife, which form a central theme in attracting both investment and visitation to the site.

The site examined in the **Francois Peron Heritage Precinct Tourism Business Opportunity Analysis** is situated approximately 6km off the Monkey Mia-Denham Road and is known as Francois Peron Heritage Precinct. It is situated in A class Reserve No. 42471 and located approximately 10kms northeast of Denham. The Francois Peron National Park was once a pastoral sheep station and the precinct around the homestead has been developed as a tourist facility. The Francois Peron Heritage Precinct provides an insight into how life was when the park was a working sheep station. It includes a self-guided historical walk trail and a small interpretive centre depicting stories of Aboriginal occupation, European settlement, and present-day conservation programs.

The study area is part of the traditional country of the Malgana people who have lived in Shark Bay for at least 30,000 years. The Malgana people were granted native title over about 28,800 square kilometres of land and waters around Shark Bay in December 2018.

The State Government is seeking to enter into collaborative agreements with the Malgana people to manage country for conservation, and the views and aspirations of Malgana traditional owners will be central to any decision-making regarding management of Francois Peron National Park.

*Image 1. Aerial view of Francois Peron Heritage Precinct.*



*Image Courtesy of Department of Biodiversity, Conservation and Attractions*



In May 2021, Economic Transitions was engaged by Tourism Western Australia on behalf of the Department of Biodiversity, Conservation and Attractions to conduct and report on a tourism business opportunity analysis for the Francois Peron Heritage Precinct. To deliver the scope set out in the tender, Economic Transitions collaborated with Executive Compass and Creative Spaces.

To achieve outcomes for the Project tasks, a concurrent mixed methods approach was conducted where both the qualitative and quantitative data were collected and analysed simultaneously. The Project commenced with the review and analysis of secondary data including key federal, state, local and regional government, tourism, and associated industry agencies. Primary data was then collected through perception based semi-structured interviews with key stakeholders, and community participation workshops for tourism analysis and tourism business development. Visitation to the Project site was conducted where the Project Team conducted an on-ground assessment of the site and liaised with expert developers in determining the Masterplan Concept costs. Visitation was conducted to an animal experience similar in nature to the concept proposed for FPHP and discussions held with DBCA – Narrogin to determine visitor numbers and cost analysis. An assessment of the above has been included in this Report.

## Masterplan Concept (Masterplan)



# Masterplan

## Francois Peron Heritage Precinct

### Legend

○ **New Roads**

● **Stage 1**

Roadways  
 Parking x 120 bays + coach & van laydown  
 Pathways for guest access  
 Pathways for staff access  
 Homestead for staffing  
 Managers Quarters 4b/2bath  
 Hot tub extension 1 shared and 6 private  
 Camping x 40, ablutions x 2, camp kitchen  
 Shearers Shed upgrade interpretation  
 Hub/Admin/Tours/Interpretation/Refreshments/Snacks  
 Amphitheatre for night sky, entertainment and general gatherings

● **Stage 2**

Glamping x 20, ablutions (TBC), Shearers Quarters x sleep 60-80. Renovation to group accommodation, shared ablutions and camp kitchen  
 Refreshments/Snacks upgrade to cafe/licensed bar (60pax)

● **Stage 3**

Self Contained Chalets x 6. Each Accommodation will house;

- 3 bedrooms with bedding as follows - 1 queen (2pax), 1 split king (2pax), 1 x 4 bunks (8pax). Includes sheets, pillows and blankets.
- Kitchen with full working facilities, utensils, crockery, cutlery, glassware etc
- 2 bathrooms with shower & toilet in each & towelling
- Living and lounge area
- Dining suite & chairs (indoor & outdoor sets)
- 2 car parking bays
- Reverse cycle air conditioning





# Artesian Hot Springs

## Stage 1

The aesthetic appeal of the artesian bore bath could be elevated to be a more inviting, spa-like experience. Timber decking could hide the baths pipes/structure, whilst adding landscaping around the perimeter would make it feel cosy and provide more of a personal experience.

The health benefits of artesian water could be promoted as well.

The high mineral content of the Artesian Thermal water includes minerals such as calcium, magnesium, potassium, sulphur & bicarbonate, which are believed to be absorbed into the skin, helping to repair tissue damage and also help the body fight illness. Some of the benefits include:

- Rejuvenation and rehydration of your skin
- Assistance with detoxifying the lymphatic system
- Muscle relaxation and joint pain relief, helpful for those muscular and arthritic problems
- Assistance with sciatica and nerve trouble
- Helpful for people who have trouble sleeping
- Stress relief
- Help with poor circulation
- Provide relief of symptoms eczema, psoriasis and other common skin complaints



Artesian baths at Wooramel Station



Examples of concrete pools with either timber and steel cladding



Artesian baths at Wooramel Station



## Communal Areas

### Stages 1-3

A welcoming, cosy communal atmosphere will help to provide an authentic experience for visitors to the site.

A small amphitheatre-style area could also be used as a starting point for night sky and cultural tours.



Wooramel Station timber seating and fire pits



Wooramel Station stage and lighting



Strathewan Bushfire Memorial



Amphitheatre seating at Alice Springs Desert Park



Bushman's Hill - Wiradjuri Amphitheatre, NSW



Credo Station, Kalgoorlie



# Signage

## Stages 1-3

With the large area and spread of sites in the precinct, clear and concise wayfinding signage is vital for visitors to understand and navigate the site.

Buildings should be clearly labelled and naming consistent throughout the site.

The DBCA does have a style guide for their wayfinding and interpretive signage but some variation from this may be permissible, to allow the site to have it's own personality.

A welcome or acknowledgment of country should be featured close to the entry hub and ideally, in dual language.



Entry signage at Wooramel Station



Site signage at Kalbarri Skywalk



Examples of wayfinding and orientation signage



Welcome signage at Strawberry Hill featuring dual language



Wall-based interpretive signage, Gwalia Historic Precinct



Battery Point Sculpture Signage, Hobart



Freestanding signage, Gwalia Historic Precinct



## Exterior Interpretation

### Stages 1-3

The existing interpretive signage on site has generally weathered well, with only some signs needing to be updated.

Other forms of interpretation can also be woven throughout the site and introduced through other methods such as audio, integration into shelters and pathways and sculptural elements (suitable for the conditions of the site).



Hand-cranked audio posts, Slater Homestead, Goomalling



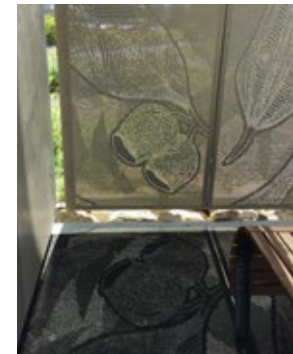
Solar powered audio bench seating, Toodyay



Pathway graphics, Kalbarri Skywalk



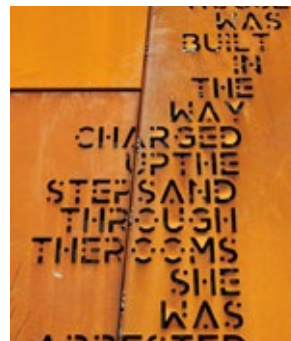
Picnic shelters, Optus Stadium



Interpretive pathway graphics, Optus Stadium



Existing exterior interpretive signage



Interpretive wall, Yagan Square



Location map etched into concrete seating



Interpretive information etched into timber seating



## Interpretive Centre

### Stage 1

Ideally the interpretation (both exterior and interior) would be assessed as a whole, with a full re-design of the interpretive centre using modern story-telling and display narratives recommended (see following page).

Possible interpretation topics could be expanded to include Malagna cultural stories, flora and fauna, constellation/night sky, pastoral station history, and the return to 1616 project on Dirk Hartog.



Herdsman Lake Discovery Centre



Displays at the Karijini Interpretive Centre



Interpretive displays at the Ningaloo Visitor Centre



Interpretive displays at the Ningaloo Visitor Centre

## Group Accommodation

### Stage 2

The existing Shearer's Quarters would be ideal to convert into group accommodation. The rustic aesthetic would be important to retain.

- Groups of students from varied streams will be suitably accommodated with appropriate ablution and bedding segmentation.
- Social groups, corporate team building, sporting associations and private functions will find the allocation of bunks, singles and queen bedding options perfect for all needs in the rustic yet comfortable outback experience.
- A centre space between rooms and catering provides open plan for social gatherings, formal meetings, relaxation and group dining.
- The Shearers camp kitchen provides all requirements to self cater or attract a commercial caterer.
- The Francois Peron Cafe/ Bar will also provide group catering to specific budgets and dietary requirements.



Mani Shearers Quarters, Baldry NSW



Credo Station, Kalgoorlie



Shearer's quarters accommodation at Mellenbye Station





# Glamping Accommodation

## Stage 2

Allocated north of the Homestead with sufficient privacy, spacing and positioning to best take in the locational aspects. Organic pathways will direct guests to their cabins from a separate glamping only car park. Bedding, linen, mini fridge & comfortable seating will lift you high enough to take in all of nature's outdoor beauty as if camping, but with the finer comforts. A separate glamping amenities block will provide warm showers.

- 50% Eco Tents (sleep x2 Queen)
- 50% Family Tents (sleep x4 Queen/ 2 single)
- Ensuites not included at this stage. May review opportunity by developer options.



Cave Hill Creek



Karijini Eco Retreat tents



Karijini Eco Retreat site



Pindering Eco Retreat - Ecostructures tent range



Longitude 131, Uluru-Kata Tjuta National Park, NT



Spicers Canopy Eco Lodge, Maryvale, QLD



Bamurru Plains Safari Bungalows, Kakadu, NT

## Animal Encounters

Guided animal encounters would offer an additional experience to the site, giving visitors the opportunity to interact with the local wildlife in their natural environments.

It would be ideal to schedule these tours at dusk and into the evening once the sun has gone down and temperatures drop. The examples on this page demonstrate twilight tours and include the use of torches or night-vision goggles.

The Twilight Experience in Hobart includes a packed picnic dinner that showcases the local produce of the area. This may be something that can be incorporated into the Francois Peron tours.



Barna Mia Nocturnal Wildlife Experience, Narrogin WA



Whiteman Park Woylie Walk



Night Vision Tour by Vision Eco Tours, Byron Bay



Twilight Experience, Hobart





## Summary of Findings

- Majority of the attraction and tour businesses are considered natural tourism (n = 27), with only two businesses being categorised as cultural and one each for Aboriginal and educational. Opportunity exists for astrotourism, geotourism, Aboriginal and heritage tourism which can be incorporated into the Francois Peron Heritage Precinct masterplan.
- Despite the impact of COVID-19 on tourism globally, visitation to the Shire remained relatively strong with an overall visitation change of -8.5% between 2019 (126,300 visitors) and 2020 (115,600 visitors), with international overnight visitors recording 21.9% decrease in visitation and 20.7% decrease in overnight stays.
- The economic benefit from tourism peaked in 2019 at \$71M to the Shire of Shark Bay however has adjusted to \$60M in 2020 impacted by the decrease in visitation due to COVID-19 and restrictions placed on intrastate and international travel.
- Top activities for visitors to the Shire of Shark Bay include going to the beach (53%), fishing (29%), and visiting national parks/state parks (27%).
- The intrastate motivators and associations for 2020 – 2021 to visit WA include beach/coastal scenery, unique natural sights, water-based activities, treks, trails and/or hikes, which are all abundant in the Shire of Shark Bay and Francois Peron Heritage Precinct.
- Recent research in to dark sky tourism (Tourism Western Australia, 2021 b) reports that the target audience for dark sky tourism are males aged 34 – 54 and particularly those with young families, who consider it enjoyable, accessible, affordable, and different to other experiences.
- In Australia, health spas and more particularly hot springs, are amongst the most sought-after health and wellness experiences by the target market and records a significantly higher spend at \$609 per trip for domestic travellers.
- The Australian National Landscape Program includes the 'Ningaloo – Shark Bay National Landscape Experience Development Strategy' with three (3) priority themes – unexpected encounters, outback and ocean discovery and conservation through participation, and a number of projects and actions which support and are relevant to Francois Peron Heritage Precinct.
- WAITOC is currently working on positioning WA as the premier Aboriginal tourism destination by increasing Aboriginal experiences.
- The State of Western Australia through the 'Jina: Western Australian Aboriginal Tourism Action Plan 2021 – 2025' will work with WAITOC and the Aboriginal tourism industry to not only position WA as the premier Aboriginal tourism destination but build capacity for Aboriginal people to enter the tourism sector and facilitate the development of Aboriginal cultural experiences. The four (4) year plan is supported through a \$20M Aboriginal tourism fund and support a range of initiatives.
- The Shire of Shark Bay's 'Local Tourism Planning Strategy' (2014) provides a number of recommendations made to achieve tourism outcomes in the Shire of Shark Bay which either incorporate Francois Peron National Park or enhance the visitor experience through the accommodation and tourism provision.

The 'Gascoyne Aboriginal Land and Sea Management Strategy' (2016) outlines project opportunities for co-management, Aboriginal tourism, and community services within the Gascoyne Bioregion.

- The 'Gascoyne Regional Investment Blueprint' (2015) recognises tourism as central to economic prosperity of the Gascoyne.
- The UNESCO guidelines, the 'Operational Guidelines for the Implementation of the World Heritage Convention' (2019), are underpinned by the Australian governments' primary management objectives through the Department of Agriculture, Water, and the Environment. An online framework provides best practice principles and showcases their application in practice.

- A Shark Bay World Heritage Committee consisting of community, scientific and Indigenous representatives oversee the programme of management and administrative structures of planning and processes of the Francois Peron National Park.
- It is necessary to ensure that proposed activities or developments within or outside the World Heritage Property do not have an unacceptable impact on World Heritage values. The Commonwealth's EPBC Act provides the framework under Commonwealth legislation for the environmental impact assessment of relevant activities affecting the World Heritage Property. Under this Act actions which are likely to have a significant impact on:
  - The World Heritage values of the Shark Bay World Heritage Property,
  - Any nationally threatened species or endangered ecological community in the Shark Bay World Heritage Property,
  - Internationally protected migratory species in the Shark Bay World Heritage Property, must be subject to a rigorous environmental impact assessment process. This process may be a Commonwealth process or a State process that has been accredited by the Commonwealth as meeting appropriate criteria (Government of Western Australia, 2008).
- Consumer analysis and tourism business audit revealed a considerable gap in overnight tourist accommodation options which was disproportionate to the accommodation requirements of visitors to the Shark Bay and Monkey Mia region. The limited accommodation options have the potential to result in tourists by-passing the region rather than staying overnight resulting in lost economic benefit to the Shire of Shark Bay. The Masterplan will feature an accommodation mix in response to the gaps including multiple accommodation options to cater to a variety of tourists – glamping for a high-end experience, group accommodation which utilises the heritage facilities and preserves the Precinct's rustic, organic atmosphere, and campsites and caravan sites for a budget-friendly accommodation option.
- There is a market for alternative, natural tourism – adventure, nature-based, wildlife, ecotourism, cultural tourism – heritage, religions, event tourism – sports or festivals; and other forms of tourism such as educational or farm tourism. The Francois Peron Heritage Precinct is a remote location providing opportunity for unique, nature-based experiences. The existing hot spring is currently a drawcard for tourists but can become crowded at times. The Masterplan will expand on and refurbish the existing hot spring facilities to accommodate more tourist activity.

The current access to the Francois Peron Heritage Precinct limits travellers to those with a 4WD. The Master Plan will incorporate budgeting for improved access to facilitate increased visitation to Francois Peron Heritage Precinct.

- There is a strong consumer desire for pastoral, conservation, and Indigenous experiences in the area; however, there is currently little on offer to tourists. Flora and fauna viewing, preferably in connection with Indigenous guides, will be included in the Master Plan to alleviate this market gap and provide a tourism incentive.
- As Francois Peron National Park is an 'Class A' reserve and gazetted as a national park, care and consideration has been given to providing a concept that remains authentic to objects of the 'Shark Bay Terrestrial Reserves and Proposed Reserves Additions, Management Plan No 75 2012' (Department of Environment and Conservation, 2012) in three (3) key areas: management objectives, visitor management settings, and tourism and commercial operations.
- A Physical Carrying Capacity construct has been applied to the Masterplan Concept providing PCC totals for each of the stages. Estimated visitation for the Project has been designed to remain within the limits of the PCC.
- To alleviate FPHP visitor and FPNP commuter pressure on the current road, which is currently unsealed, an additional entry point and road is proposed which is currently used as a DBCA only accessway with an estimated cost of \$5M.

- The accommodation density has been calculated based on the appropriate planning regulations including the 'Caravan Parks and Camping Grounds Regulations 1997' (Government of Western Australia, 2020 b) which states there is to be at least 3m between camping sites on a facility and any building on the facility that is not a site, and the camp of any person who is not a member of a group, and the Building code of Australia standards.
- The current location of the hot tub would be enhanced through an increase in number of hot tubs as well as aesthetic appeal, and development of a small amphitheatre style area for night sky and cultural tours in the current scrub area.
- Interpretation around site would be upgraded and enhanced through methods such as audio, integration into shelters and pathways and sculptural elements.
- Trails would be enhanced through clear and concise wayfinding signage around site with buildings clearly identified through consistent naming and style.
- The Interpretation Centre would be redesigned to incorporate modern storytelling of Malgana cultural heritage, flora and fauna, constellation/night sky, pastoral station history, and the 'Return to 1616' project and Dirk Hartog Island.
- The Shearers Shed would be renovated and interpretation enhanced, and development of a visitation control point introduced to incorporate a hub, administration, interpretive centre, and snack bar/restaurant.
- Accommodation would be provided through:
  - Forty (40) campsites in Stage 1,
  - Twenty (20) glamping sites in Stage 2,
  - Group accommodation in the Shearing Quarters to sleep between sixty (60) and eighty (80) in Stage 2,
  - Six (6) self-contained chalets in Stage 3.

The animal encounter would likely be an opportunity for increased visitation to the Precinct, as observed in similar projects (Collett and Tischler, 1998). In alignment with Barna Mia, the animal encounter at Francois Peron Heritage Precinct would adhere to appropriate social and environment impact thresholds. However, the cost and workforce needed to develop the breeding program, in addition to sourcing the animals, will require support and the provision of facilities from DBCA.

## Recommendations

The outcome of the Project is a list of recommendations to progress the Masterplan Concept:

- Seek funding to support a full feasibility study to refine costing and design,
- Analysis of the sand material and completion of a road design to further refine cost ie. determine whether shell grit, graded or sealed,
- Hydrology testing to determine the pressure of water from the artesian hot spring to support future development at FPHP,
- Geotechnical survey to determine soil consistency and structure, as well as ground water levels for the project site,
- Structural engineer survey on current infrastructure at FPHP,
- Quantity survey feasibility study on full construction,
- Explore a single access fee for Francois Peron National Park including Monkey Mia, Dirt Hartog Island and FPNP,
- Continue to engage with the Malgana Aboriginal Corporation to ensure they remain a key stakeholder in any future development at FPHP,
- Seek expressions of interest from potential developers and investors who can support the development from the initial stages.

## Section 2. Introduction

In May 2021, Economic Transitions was engaged by Tourism Western Australia on behalf of the Department of Biodiversity, Conservation and Attractions (DBCA) to conduct and report on a tourism business opportunity analysis for the Francois Peron Heritage Precinct (FPHP). To deliver the scope set out in the tender, Economic Transitions collaborated with Executive Compass and Creative Spaces.

### Francois Peron Heritage Precinct

Francois Peron National Park is located within the Shark Bay World Heritage Area in the Gascoyne region of Western Australia (WA). It is a place of enormous environmental significance as well as being a visually stunning location. The marine and terrestrial environments both have a significant amount of wildlife, which form a central theme in attracting both investment and visitation to the site.

The site examined in the Francois Peron Heritage Precinct Tourism Business Opportunity Analysis is situated approximately 6km off the Monkey Mia-Denham Road and is known as Francois Peron Heritage Precinct. It is situated in A class Reserve No. 42471 and located approximately 10kms northeast of Denham. The FPNP was once a pastoral sheep station and the precinct around the homestead has been developed as a tourist facility. The Francois Peron Heritage Precinct provides an insight into how life was when the park was a working sheep station. It includes a self-guided historical walk trail and a small interpretive centre depicting stories of Aboriginal occupation, European settlement, and present-day conservation programs.

The study area is part of the traditional country of the Malgana people who have lived in Shark Bay for at least 30,000 years. The Malgana people were granted native title over about 28,800 square kilometres of land and waters around Shark Bay in December 2018.

The State Government is seeking to enter into collaborative agreements with the Malgana people to manage country for conservation, and the views and aspirations of Malgana traditional owners will be central to any decision-making regarding management of FPNP.

*Image 2. Aerial view of Francois Peron Heritage Precinct*



*Image Courtesy of Department of Biodiversity, Conservation and Attractions*



## Development of the Tourism Business Opportunity Analysis

To achieve outcomes for the Project tasks, a concurrent mixed methods approach was conducted where both qualitative and quantitative data were collected and analysed simultaneously. The project commenced with the review and analysis of secondary data including key federal, state, local and regional government, tourism, and associated industry agencies. Primary data was then collected through perception based semi-structured interviews with key stakeholders, and community participation workshops for tourism analysis and tourism business development. The methodology for the Project is outlined below:

1. Undertake an audit of existing tourism business offerings in the Denham/Monkey Mia area and provide a brief overview of existing tourism business strengths and characteristics, locational context, and tourism characteristics (product offer).
2. Undertake a brief desktop analysis of current tourism consumer preferences for attractions, experiences, and activities in remote locations, with specific reference to the visitor profile for Shark Bay.
3. Using the tourism business audit and consumer preferences analysis as a background, develop a business opportunity profile and business viability priority list for the FPHP, considering the following:
  - World and National Heritage values and other natural values of the planning area,
  - Aboriginal cultural and heritage values of the planning area,
  - Acceptable businesses considered within the management plan for Francois Peron National Park, **'Shark Bay Terrestrial Reserves and Proposed Reserve Additions Management Plan No. 75 2012'** (Department of Environment and Conservation, 2012),
  - Profile of visitors and visitation patterns of the area to establish viability considerations,
  - Overview of existing infrastructure, current condition and suitability and any required development/upgrades enabling infrastructure to facilitate highlighted business opportunities, including estimates of costs of basic upgrades,
  - Accessibility and seasonality, as it impacts the site,
  - Investor interest in the area,
  - Estimated development costs,
  - Basic return on investment forecasts.
4. Based on the above analysis develop a concept plan(s) for the top potential development opportunities. This should include:
  - An analysis of the economic, environmental, and social perspectives, impacts and opportunities,
  - Potential opportunities for Malgana people,
  - An overall plan of the precinct, including access,
  - A visual concept plan clarifying the potential look and feel of the proposed opportunity/s,
  - Consideration of the requirements for workers' accommodation/facilities,
  - Recommendations on the next steps to progress the identified concepts.

## Section 3. Project Methodology

It has become well documented that a mixed methods approach in tourism provides the most suitable model for best understanding the sample population (Pansiri, 2005 & 2006, Jennings, 2009). The complementarity of the qualitative and quantitative methods is used to measure the overlapping but different facets of a project, providing more rigorous, accurate, valid, and reliable data than one method alone.

### Research Design

The timeframe for the Project dictated the data collection design. The timeline at commencement of the Project was 12 weeks duration, however challenges experienced confirming flights and accommodation, and engaging with key stakeholders necessitated extending beyond this time in consultation with the Project Manager. A concurrent mixed methods design was conducted (Table 1) where the qualitative and quantitative data were collected and analysed simultaneously with equal weighting allocated to the data collected from each design method (QUAL + QUANT). The data was analysed once all research methodology had been completed.

**Table 1. Qualitative and Quantitative Research Design.**

Qualitative Research	Quantitative Research
Perception based semi-structured interviews with key stakeholders	Data collection from Tourism WA, Tourism Research Australia REMPLAN data, and Department of Biodiversity, Conservation and Attractions
Community participation workshops	

Secondary data was sourced from reports made available by Tourism WA, DBCA, REMPLAN, publicly available trade publications and various tourism organisation reports, statistics from the Australian Bureau of Statistics and Tourism Research Australia, and various academic publications. Primary data was collected through perception based semi-structured interviews with key stakeholders, and a community participation workshop.

The success of any regional development or destination is primarily dependent on the support of the local community. A sustainable approach to tourism envisages the people being empowered by owning their culture as part of any tourism development (Singh in Ghosh, Siddique and Gabbay, 2003, 34). Since tourism relies comprehensively upon the goodwill of the residents, their support is essential for its development, successful operation, and sustainability (Jurowski, 1994). A community participation approach was applied in the development of the Project. It ensures the community engages in the process of its development, locally held knowledge is shared, and commonly perceived problems and widely accepted solutions are discovered via collaboration (Okazaki, 2008).

Stakeholder engagement (Appendix 1) commenced in early June and continued until early October including throughout the completion of the report. Majority of stakeholders were easily accessible and eager to engage with the consultants. The Malgana Aboriginal Corporation (MAC) and Yamatji Marlpa Aboriginal Corporation (YMAC) were contacted on numerous occasions (Appendix 2), and although an initial conversation was held with Harry Oakley, further engagement was not forthcoming.

The community workshop in Denham was conducted on Thursday, 17 June 2021 from 6pm to 7.30pm at the Shark Bay Recreation Centre Meeting Room, 30 Francis Street, Denham (Appendix 3). Marketing of the event was by distribution to stakeholders and dissemination through their channels, as well as Facebook, website, and word of mouth. A total of eight (8) community members participated in the workshop.

## Project Scope

The Project Scope is outlined in detail below in Table 2:

**Table 2. Francois Peron Heritage Precinct Tourism Business Opportunity Analysis Project Scope.**

Methodology	Activities
<b>Preliminary Project Activities</b>	
Develop detailed Project plan and conduct stakeholder engagement.	Review proposed methodology and timeline as submitted in the RFQ and discuss with Tourism WA and key stakeholders as required.
Undertake desktop analysis of current tourism consumer preferences for attractions, experiences, and activities in remote locations, with specific reference to the visitor profile for Shark Bay.	Review all key documentation to conduct an analysis of current tourism consumer preferences for attractions, experiences, and activities in remote locations; review visitor profile for Shark Bay sourced through Tourism Research Australia, Tourism WA, Australia's Coral Coast, Destination Shark Bay, Visitor Centres, and other sources as may be available; identify other heritage precincts to assess comparative advantage.
<b>Key Project Activities to complete the Francois Peron Heritage Tourism Business Opportunity Analysis</b>	
Conduct key stakeholder engagement.	Visit to Shark Bay to conduct stakeholder engagement with DBCA, Malgana Aboriginal Corporation, Gascoyne Development Commission, Shark Bay Working Group, and other key business and tourism stakeholders; conduct workshop with key business and tourism stakeholders in the Project area to determine tourism and business sentiment for the area where participants assist in the development of a SWOT Analysis and Tourism Gap Analysis.
Undertake an audit of existing tourism business offerings in the Denham/Monkey Mia area.	Conduct an audit of existing tourism business offerings in the Denham/Monkey Mia area; conduct a SWOT Analysis of tourism business characteristics and locational context including product offering to identify the strengths, weaknesses, opportunities and threats of the Project area including locational context and tourism characteristics (product offering); identify gaps in the tourism offering; assess existing infrastructure for condition, suitability, development and upgrades; assess each existing structure and identify potential business use; use of the product/market matrix from Ansoff's tool.
Develop a business opportunity profile and business viability priority list for the Francois Peron Heritage Precinct	Review the tourism business audit and consumer preferences analysis; review visitation patterns and visitor profile to the Project area through the analysis of tourism data from Tourism Research Australia where economic benefit of tourism can be determined; review of acceptable businesses as per the management plan for Francois Peron National Park including costs; review accessibility, seasonality and impacts; analyse investor interest through review of previous investment initiatives; use of the PESTEL tool to understand the macro-environment.
	Review the World and National Heritage values and other natural values of the planning area including Aboriginal cultural and heritage values associated with the Project area; seek assistance through the Malgana people to identify the cultural and heritage values of the Project area. Review aerial photos and site plans to be requested through DBCA.
	Establish cost estimates for each of the proposed developments and basic ROI forecasts from the above outcomes with possible key ratios to use including Return on Equity, Return of Total Assets and Return on Invested Capital.

Develop a concept plan(s) for the top potential development opportunities.	Analysis of triple bottom line perspectives, impacts and opportunities using measures suitable to each perspective including (but not limited to) Debt to Equity Ratio, Working Capital Ratio, Carrying Capacity, available economic and social impact studies; potential opportunities for the Malgana people following conversations during the workshops and stakeholder meetings; overall plan of the precinct including access; visual concept plan clarifying potential look and feel; workers accommodation and facilities.
	Provide recommendations to progress to the next Project stage by outlining the outcomes from the research and highlighting key recommendations.

## Section 4. Audit of Existing Tourism Business Offerings in Denham and Monkey Mia

### Tourism Business Offerings in Denham and Monkey Mia

An analysis of existing tourism business offerings in Denham and Monkey Mia was conducted through an onsite visit 16 to 19 June 2021, and desktop analysis between 14 July and 14 September 2021. The desktop review incorporated the analysis of data received during the site visit and appraising against the Shark Bay Phone Book available online through the Shire of Shark Bay website and various websites shown through a Google search of 'Tourism Shark Bay'. These websites included:

- [www.australiascoralcoast.com](http://www.australiascoralcoast.com) managed by Australia's Coral Coast,
- [www.sharkbay.org](http://www.sharkbay.org) managed by DBCA,
- [www.westernaustralia.com](http://www.westernaustralia.com) managed by Tourism WA,
- [www.experiencesharkbay.com](http://www.experiencesharkbay.com) managed by Shark Bay Tourism Association,
- [www.sharkbayvisit.com.au](http://www.sharkbayvisit.com.au) managed by the Shark Bay World Heritage Discovery & Visitor Centre,
- [www.waholidayguide.com.au](http://www.waholidayguide.com.au) managed by Visitor Centres WA.

To align with categories on the above-mentioned websites, the complete list of business offerings in the Shire of Shark Bay (Appendix 4) have been allocated to the categories of:

- accommodation,
- attraction,
- aviation,
- food and beverage,
- retail,
- sport and recreation,
- tours,
- transportation.



## Tourism Characteristics

The list of business offerings has been refined to the categories of attraction and tour with the characteristics of the tourism (Morton, 2018) product identified as:

- **Intangibility** – the product or service cannot be reproduced or reused.
- **Inseparability** – the product or service can only be consumed or expended at the location of that product or service.
- **Perishability** – the consumption of products or services as they are produced.
- **Transferability** – the product or service cannot be transferred to another location.
- **Participation** – the quality of the product or service results from a personal interaction.
- **Investment and immobility** – the ‘yet to be received’ return on the investment of the product or service, and the attachment to one location only.
- **Inconsistency** – products or services cannot be standardised due to purchaser perception and external uninfluenceable factors such as weather.

Each of the tourism characteristics has been applied in Table 3.

Although alternative tourism has been considered as the primary tourism category for Denham and Monkey Mia, there remains a visitor footprint post visitation for the natural environment.

## Tourism Offerings and Gaps in the Market

Tourism in and around Shark Bay and Monkey Mia is considered alternative tourism due to its consistency with natural, societal and community values and as it is geared towards more responsible tourism practices and the sustainable development paradigm (Newsome, et al, 2002). Alternative tourism can also be considered ‘good tourism’ as the ‘good tourist’ travels out of peak season to relatively unknown areas and partakes in local activities and purchases local produce (Wood and House, 1991 in Mason, 2008). While the number of tourists to Shark Bay have steadily increased since mid-2020, limited accommodation restricts the number of visitors staying overnight in the town of Shark Bay and Monkey Mia location. However, numbers of visitors are somewhat unrestricted travelling in to and staying in the National Parks.

Alternative tourism can be further defined by the emphasis of the activity being conducted including natural tourism – adventure, nature-based, wildlife, ecotourism; cultural tourism – heritage, religions; event tourism – sports or festivals; and other forms of tourism such as educational or farm tourism. Each tourism business listed in Table 3 has been allocated a tourism category to determine the gaps in the tourism offering. Majority of the attraction and tour businesses are considered natural tourism (n = 27), with only two businesses being categorised as cultural and one each for Aboriginal and educational. Opportunity exists for astrotourism, geotourism, Aboriginal and heritage tourism which can be incorporated in to the Francois Peron Heritage Precinct masterplan.

Table 3. Tourism Characteristics of Attractions and Tours in the Denham/Monkey Mia Area.

Tourism Characteristics										
Business Name	Location	Tourism Business Type	Category of Tourism	Intangibility	Inseparability	Perishability	Transferability	Participation	Investment & Immobility	Inconsistency
Autopia Tours – Get Lost Travel – Australian Bus Charters	Denham	Tour	Natural	✓	✓	✓		✓		✓
Bernier & Dorre Islands Nature Reserve	West of Carnarvon	Attraction	Natural	✓		✓	✓	✓	✓	✓
Big Lagoon	Denham	Attraction	Natural				✓		✓	✓
Denham Discovery Trail	Denham	Tour	Natural		✓			✓	✓	✓
Dirk Hartog Island National Park	Dirk Hartog Island	Attraction	Natural			✓	✓		✓	✓
Eagle Bluff	Denham	Attraction	Natural				✓	✓	✓	✓
Edel Land National Park	Denham	Attraction	Natural			✓	✓	✓	✓	✓
Francois Peron Heritage Precinct	Denham	Attraction	Natural Cultural				✓	✓	✓	✓
Francois Peron National Park	Denham	Attraction	Natural			✓	✓	✓	✓	✓
Hamelin Pool	Hamelin Pool	Attraction	Natural			✓	✓	✓	✓	✓
Little Lagoon	Denham	Attraction	Natural				✓	✓	✓	✓
Luxury Outback Tours	Denham	Tour	Natural	✓	✓	✓		✓		✓
Monkey Mia Boat Hire	Monkey Mia	Tour	Natural	✓	✓	✓		✓		✓
Monkey Mia Dolphin Experience	Monkey Mia	Tour	Natural	✓	✓	✓		✓		✓
Monkey Mia Wildsights	Monkey Mia	Tour	Natural	✓	✓	✓		✓		✓
Naturetime Tours	Denham	Tour	Natural	✓	✓	✓		✓		✓
Ocean Park Aquarium	Denham	Attraction	Natural	✓	✓	✓		✓	✓	✓
Perfect Nature Cruises	Monkey Mia	Tour	Natural	✓	✓	✓		✓		✓
Shark Bay Boat Hire	Denham	Tour	Natural	✓	✓	✓		✓		✓
Shark Bay Coastal Tours	Denham	Tour	Natural	✓	✓	✓		✓		✓
Shark Bay Discovery Centre	Denham	Attraction	Educational	✓	✓			✓	✓	✓
Shark Bay Dive & Marine Safaris	Denham	Tour	Natural	✓	✓	✓		✓		✓
Shark Bay Kitesurfing	Denham	Tour	Natural	✓	✓	✓		✓		✓
Shark Bay Marine Tours	Denham	Tour	Natural	✓	✓	✓		✓		✓
Shark Bay Quad Bikes	Denham	Tour	Natural		✓	✓		✓		✓
Shark Bay World Heritage Discovery & Visitor Centre	Denham	Attraction	Educational Cultural	✓	✓	✓	✓	✓	✓	✓
Shell Beach	Hamelin Pool	Attraction	Natural						✓	✓
South Peron	South Peron	Attraction	Natural	✓					✓	✓
Wula Gura Nyinda Eco Cultural Adventures	Denham	Tour	Natural Aboriginal	✓	✓	✓		✓		✓

## SWOT Analysis

Semi-structured questions to determine the strengths, weaknesses, opportunities, and threats (SWOT) of the tourism business environment in Denham, FPHP and Monkey Mia were incorporated in to the workshop and stakeholder meetings. Key themes evolved throughout the workshop and meetings and outlined in Figure 1:

- Strengths include the natural tourism assets, particularly the hot tubs at FPHP and the beach locations in FPNP, and the area along the foreshore in Denham which has recently been upgraded to incorporate children play facility,
- Weaknesses include the current limited accommodation supply due to the high number of visitors from the intrastate market, limited Aboriginal businesses which could be promoting the local community, limited social presence of any local business, and the inconsistency in service from the businesses,
- Threats include the limited sustainability of the tourist attraction due to the decreasing numbers of dolphins interacting along the foreshore, inability to take hire cars and 2WD cars off road and hire cars on any road between dusk and dawn, and the high number of visitors currently staying in the region will impact negatively on the maintenance and upkeep of tourism products,
- Opportunities include development of Aboriginal businesses, new entrants to the market including tourism product, and capitalising on the increase in visitation by increasing tourism product to include Aboriginal tourism, astrotourism and geotourism.

Many of the opportunities and weaknesses have been addressed in the context of Business Opportunity in Section 8.

## KEY FINDINGS

- Majority of the attraction and tour businesses are considered natural tourism (n = 27), with only two businesses being categorised as cultural and one each for Aboriginal and educational.
- Opportunity exists for astrotourism, geotourism, Aboriginal and heritage tourism which can be incorporated in to the Francois Peron Heritage Precinct masterplan.

Figure 1. SWOT Analysis of Existing Tourism Business Offerings in the Denham and Monkey Mia Area.





## Section 5. Consumer Preferences for Attractions, Experiences and Activities in Remote Locations

### Visitation Profile

The Shire of Shark Bay is a haven for visitors wanting to enjoy a remote location with a natural environment, unspoilt coastline, and brilliant night sky. Visitation to the Shire had been steady until 2020 and the outbreak of COVID-19 which impacted international travel to Western Australia and the broader regional areas. Despite the impact of COVID-19 on travel for both domestic and international markets, visitation to the Shire remained relatively strong with an overall visitation change of 8.5% decrease between 2019 (126,300 visitors) and 2020 (115,600 visitors), with international overnight visitors recording 21.9% decrease in visitation and 20.7% decrease in overnight stays. Compared with statistics for 2016 (Table 4), total overnight visitation has decreased by 8.5% however overnight stays has increased by 12%. The economic benefit from tourism peaked in 2019 at \$71M to the Shire of Shark Bay however has adjusted to \$60M impacted by the decrease in visitation due to COVID-19 and restrictions placed on intrastate and international travel.

*Table 4. Visitor Statistics for the Shire of Shark Bay.*

Shire of Shark Bay	2016	2017	2018	2019	2020
International Overnight Visitors	28,500	31,200	33,000	37,000	28,900
Domestic Overnight Visitors	94,000	91,000	82,700	89,300	86,700
<b>Total Overnight Visitation</b>	<b>122,500</b>	<b>122,200</b>	<b>115,700</b>	<b>126,300</b>	<b>115,600</b>
International Overnight Nights	74,000	97,000	114,700	133,700	106,000
Domestic Overnight Nights	303,300	344,300	337,300	354,700	320,000
<b>Total Overnight Nights</b>	<b>377,300</b>	<b>441,300</b>	<b>452,000</b>	<b>488,400</b>	<b>426,000</b>
International Av. Nights Stay	2.6	3.1	3.5	3.6	3.7
Domestic Av. Nights Stay	3.2	3.8	4.1	4	3.7
International Av. \$ Spend per Trip	\$345	\$388	\$393	\$396	\$294
Domestic Av. \$ Spend per Trip	\$558	\$546	\$569	\$645	\$685
<b>Total Economic Benefit (M)</b>	<b>\$58</b>	<b>\$62</b>	<b>\$62</b>	<b>\$71</b>	<b>\$60</b>

*Source: Tourism WA, Tourism Research Australia*

The above data for the years 2016 to 2020 are averaged over a three-year period to minimise the impact of variability in estimates and provide more robust volume estimates.

Research conducted by Tourism WA (2020) for the domestic overnight visitor market indicates that based on a three-year average (2017 – 2019):

- 87% of visitors travelled for holiday,
- The age range 35 – 49 years recorded 28% of all domestic overnight travellers closely followed by 50 – 64

years at 27% and 65 + years recorded 21%,

- Friends and relatives travelling together recorded 33% of all travellers closely followed by adult couples recording 31%,
- 65% of travellers stayed between 1 and 3 nights in the Shire followed with 25% staying 4 to 7 nights,
- 47% of visitors staying in a caravan park or commercial camping ground,
- There is an even gender split for visitors to the Shire.

In comparison, the international overnight visitor market recorded the following statistics based on a three-year average (2017 – 2019):

- 98% of visitors travelled for holiday,
- The age range 20 – 34 years recorded 45% of all international overnight travellers followed by 50 – 64 years at 24% and 35 – 49 years at 17%,
- Adult couples travelling together recorded 41% of all travellers closely followed by independent visitors travelling alone recording 38%,
- 89% of travellers stayed between 1 and 3 nights in the Shire,
- 28% of visitors staying in a caravan park or commercial camping ground,
- 59% of visitors to the Shire were male.

Top activities of visitors to the Shire between 2016 and 2020 and listed in Table 5 align with the motivators and associations for visiting WA as listed in Table 7. While fishing has not been independently identified as a motivator for travelling to WA, activities listed in 'What travellers are looking for in a holiday destination generally' and 'What travellers associate with WA' can include this type of experience ie. truly unique places and experiences.

**Table 5. Top Activities of Visitors to the Shire of Shark Bay.**

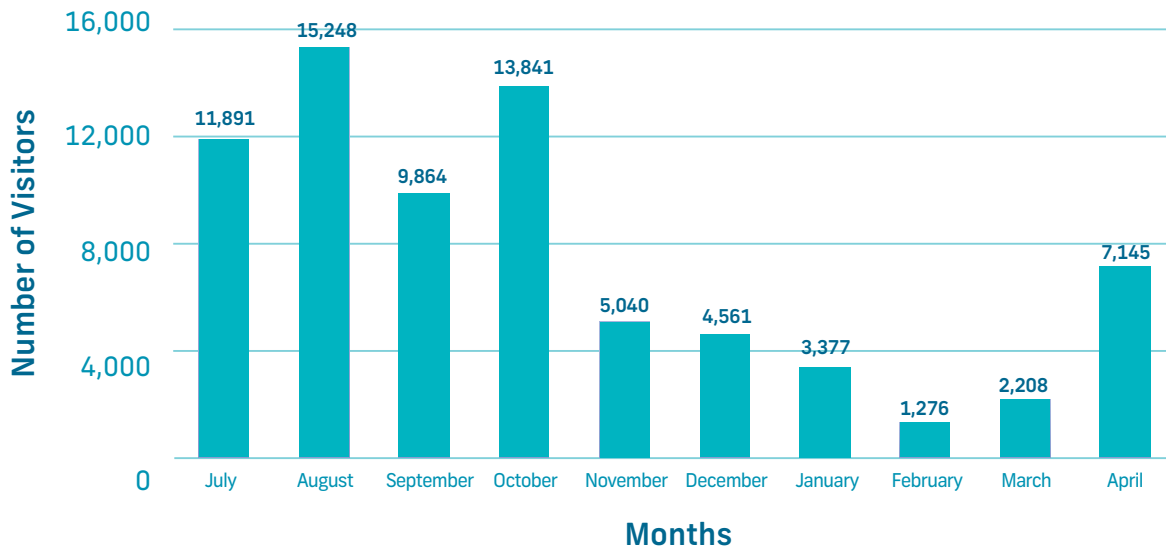
Activity	%
Go to the beach	53%
Eat out / dine at a restaurant and/or cafe	42%
Sightseeing/looking around	34%
Fishing	29%
Visit national parks / state parks	27%
Pubs, clubs, discos etc	25%

Source: Tourism Research Australia

Visitation to the FPHP for the period 2020/2021 (Table 6) was consistent between July and October 2020, decreasing with the onset of the summer season during the months of November through until January. February 2021 recorded low numbers due to a COVID-19 lockdown in Perth between 31 January and 5 February 2021 for the Perth, Peel and South West regions of Western Australia. Travel restrictions remained until 14 February 2021 however was followed with a snap lockdown between 24 and 26 April 2021.

*Table 6. Visitation to Francois Peron Heritage Precinct, 2020 - 2021.*

## Francois Peron Heritage Precinct Visitation 2020-21



*Source: Department of Biodiversity, Conservation and Attractions*

## Market Analysis

### Motivators and Associations

Research conducted by Tourism WA (2021a) has identified motivations and associations of intrastate and interstate visitors to WA. Data for the interstate market, 'What travellers are looking for in a holiday destination generally' and 'What travellers associate with WA' (Table 7), have been sourced from leisure travellers from Sydney and Melbourne, with the 'Top motivators to visit WA' being sources from interstate travellers in general.

Highlighted in blue in Table 7 and Table 8 are the motivations and associations which the Shire and the Project site currently has on offer for visitors to the region. The cells highlighted in green have the potential to provide visitors with additional attractions, experiences, or activities through the proposed blue Masterplan.

**Table 7. Interstate Market Profile – Motivations and Associations for 2020 – 2021.**

What Travellers are Looking for in a Holiday Destination Generally	What Travellers Associate with WA	Top Motivations to Visit WA
Range of things to do and see	Unspoilt natural beauty	Beaches/coastal scenery
Place where I can relax and unwind	Range of things to do and see	Unique natural sights
Good value for money	Close interactions with native wildlife	New place or bucket list
Great food and beverage offerings	Easy to plan and book	To visit a friend or relative
Unspoilt natural beauty	Truly unique places and experiences	Pristine natural environments
Easy to get to, and around	Authentic Indigenous experiences	Good food, wine, and local cuisine
Truly unique places and experiences	Active adventures and experiences	
Welcoming people	Great food and beverage offerings	
Easy to plan and book	Place where I can get away from it all	
Great historical/heritage attractions	Good for re-connecting with myself and/or others	

Source: Tourism WA



**Table 8. Intrastate Market Profile – Motivations and Associations for 2020 – 2021.**

What Travellers are Looking for in a Holiday Destination Generally	Top Triggers to Visit WA	Top Motivations to Visit WA
Good value for money	Wanted to return to a place I've been before	Beach/coastal scenery
Range of things to see and do	Visit a friend or relative	Pristine natural environment
Place where I can relax and unwind	Personal recommendation from someone I know	Good food, wine, and local cuisine
Visiting places I've never been before	Friend or relative was visiting	Unique natural sights
Great food and beverage offerings	Good package deal	Water based activities (e.g. Snorkelling)
Easy to get to, and around		Treks, trails and/or hikes
Unspoilt natural beauty		
Easy to plan and book		
Welcoming people		
Truly unique places and experiences		

Source: Tourism WA

## Destination Profiles

Destination profiles released by Tourism Australia (2020) provide data on visitor demographics and activities of domestic overnight visitors for 2019. Destination offerings are based around popular visitor activities with four (4) relevant for the Shire of Shark Bay and the Project area and include beach, caravan and camping, fishing and golf, and national park with the statistics provided in Figure 2. Market profiles provide detail on the demographics and types of visitors and the activities they want to do. Profiles that are relevant for the Shire of Shark Bay and the Project area include arts and culture activities, beach and national parks with statistics provided in Figure 3.

Caravan and camping trips taken in WA in 2020 (Tourism Western Australia, 2021a) recorded only a 9% decline compared to 2019, totalling 1.6 million trips with the majority of visitor nights being spent in caravan or camping accommodation. The largest decline was in international visitors which recorded 75% with 5% decline from domestic visitors. Australia's Coral Coast was the second most popular region for caravan and camping visitors attracting 25% of visitors behind Australia's South West with 34%. An increase of 4% was recorded for visitors staying in National Parks or Crown Land (Tourism Western Australia, 2020).

Figure 2. Destination Profiles for the Shire of Shark Bay.



Source: Tourism Research Australia

Figure 3. Market Profiles for Shire of Shark Bay.



Source: Tourism Research Australia



While the destination and market profiles provide data based on popular activities as recorded by TRA, there are a number of activities and experiences in addition to these which are relatively unique experiences in Western Australia: dark sky tourism, and health and wellness tourism.

Recent research in to dark sky tourism (Tourism Western Australia, 2021b) reports that the target audience for dark sky tourism are males aged 34 – 54 and particularly those with young families, who consider it enjoyable, accessible, affordable, and different to other experiences. The target audience is reported to be interested in a broad range of dark sky tourism activities which include viewing wildlife at night, dinner under the stars, viewing an observatory, public stargazing, and hot springs under the stars, each with the potential to be extraordinary experiences in FPHP.

Health and wellness tourism is finding its niche globally as 'wellness tourist zones' are created around the world to combat the effects of over-tourism (The New Daily, 2019). In Australia, health spas and more particularly hot springs, are amongst the most sought-after health and wellness experiences by the target market. Ranked in the top five (5) wellness tourism markets by the Global Wellness Institute (GWI), Australia recorded 900,000 wellness travellers in 2018, an increase of 7.6% in five (5) years. This target market has also recorded a significantly higher spend with international wellness tourism spending \$1,528 per trip and domestic wellness tourism spending \$609 per trip. The motivation for healthier, stress reduced living, and creating a sense of meaning or joy is key for health and wellness tourists, which can ideally be found at FPHP.

## KEY FINDINGS

- Despite the impact of COVID-19 on tourism globally, visitation to the Shire remained relatively strong with an overall visitation change of -8.5% between 2019 (126,300 visitors) and 2020 (115,600 visitors), with international overnight visitors recording 21.9% decrease in visitation and 20.7% decrease in overnight stays.
- The economic benefit from tourism peaked in 2019 at \$71M to the Shire of Shark Bay however has adjusted to \$60M impacted by the decrease in visitation due to COVID-19 and restrictions placed on intrastate and international travel.
- Top activities for visitors to the Shire of Shark Bay include going to the beach (53%), fishing (29%), visiting national parks/state parks (27%).
- The intrastate motivators and associations for 2020 – 2021 to visit WA include beach/coastal scenery, unique natural sights, water-based activities, treks, trails and/or hikes, which are all abundant in the Shire of Shark Bay and Francois Peron Heritage Precinct.
- Recent research into dark sky tourism (Tourism Western Australia, 2021b) reports that the target audience for dark sky tourism are males aged 34 – 54 and particularly those with young families, who consider it enjoyable, accessible, affordable, and different to other experiences.
- In Australia, health spas and more particularly hot springs, are amongst the most sought-after health and wellness experiences by the target market and records a significantly higher spend at \$609 per trip for domestic travellers.

## Section 6. Economic Contribution of Tourism to the Local Economy

The local government area of Shark Bay is located in the Gascoyne region of Western Australia, traversing the coastline for 600 kilometres and for more than 500 kilometres inland to remote outback lands for a total area of over 140,000km<sup>2</sup>. The region hosts exceptional and unique tourism experiences which are unique to the region and attract a range of markets from intrastate, interstate, and international markets.

When analysing economic and tourism data, the Australian Bureau of Statistics (ABS) does not recognise tourism as an industry. Therefore, tourism is reported as an amalgam of activities across various industry sectors including (but not limited to) retail, accommodation, cafes and restaurants, cultural and recreational services (Source: <https://app.remplan.com.au/gascoyneregion/economy/tourism/employment?state=5DEbfY!bzeWC7jV2FDWQ4zcYYZ9zH4t0h7oXiGDIDvcgGWGnc7hWeHyhxUd4YRCDRP>).

### Employment Profile

Employment represents the number of people employed by businesses or organisations in each of the industry sectors in the defined regions. The employment data reported reflects the place of work and total numbers of employees regardless of the employment status.

In the Gascoyne Region, tourism supports an estimated 606 jobs or 13.1% of total employment. The largest sub-sector in the Gascoyne region is Accommodation & Food Services with 449 jobs supported by tourist expenditure. Of the total jobs:

- 277 jobs are supported by tourism in Carnarvon (45.7%),
- 229 jobs are supported by tourism in Exmouth (37.8%),
- 95 jobs are supported by tourism in Shark Bay (15.7%).

**Table 9. Total Number of Employees in the Shire of Shark Bay.**

Industry sector	Gascoyne Region	Shark Bay
<b>Tourism</b>	<b>606</b>	<b>95</b>
Mining	530	70
Agriculture, Forestry & Fishing	506	22
Retail Trade	419	32
Public Administration & Safety	404	32
Construction	385	11
Health Care & Social Assistance	340	0
Education & Training	319	22
Transport, Postal & Warehousing	263	13
Professional, Scientific & Technical Services	151	4
Administrative & Support Services	144	9

Other Services	127	9
Manufacturing	102	6
Accommodation & Food Services	84	15
Arts & Recreation Services	80	24
Rental, Hiring & Real Estate Services	47	0
Electricity, Gas, Water & Waste Services	46	0
Wholesale Trade	38	0
Financial & Insurance Services	19	0
Ownership of Dwellings	9	0
Information Media & Telecommunications	4	0
<b>Total</b>	<b>4,623</b>	<b>364</b>

Source: REMPLAN, 2021

## Tourism Output

Tourism output represents the gross revenue generated by businesses in each of the industry sectors.

In the Gascoyne Region, tourism output is estimated at \$206,438 million, which is 8.8% of total output. The largest sub-sector in the Gascoyne region is Accommodation & Food Services with tourist's expenditure supporting \$130.464 million. Of the total output generated:

- \$89.876 million output is generated by tourism in Carnarvon (43.5%),
- \$86.272 million output is generated by tourism in Exmouth (41.8%),
- \$30.282 million output is generated by tourism in Shark Bay (14.7%).

Table 10. Tourism Output in the Shire of Shark Bay.

Industry sector	Gascoyne Region	Shark Bay
Mining	\$615,514,502	\$43,525,066
Agriculture, Forestry & Fishing	\$260,555,791	\$13,554,299
Construction	\$246,823,898	\$5,734,568
<b>Tourism</b>	<b>\$206,438,497</b>	<b>\$30,282,300</b>
Transport, Postal & Warehousing	\$167,463,662	\$8,906,549
Public Administration & Safety	\$125,919,474	\$8,591,903
Ownership of Dwellings	\$114,035,067	\$8,805,564

Manufacturing	\$113,426,850	\$10,670,081
Retail Trade	\$65,658,614	\$5,051,878
Health Care & Social Assistance	\$59,928,120	\$0.00
Education & Training	\$58,912,956	\$3,463,857
Electricity, Gas, Water & Waste Services	\$58,786,208	\$0.00
Professional, Scientific & Technical Services	\$57,211,538	\$1,505,935
Administrative & Support Services	\$49,500,830	\$2,460,779
Rental, Hiring & Real Estate Services	\$41,578,457	\$0.00
Other Services	\$28,427,124	\$2,225,641
Accommodation & Food Services	\$24,337,726	\$4,407,453
Wholesale Trade	\$21,300,209	\$0.00
Financial & Insurance Services	\$19,995,604	\$0.00
Arts & Recreation Services	\$17,595,866	\$4,179,179
Information Media & Telecommunications	\$865,984	\$0.00
<b>Total</b>	<b>\$2,354,276,977</b>	<b>\$153,365,051</b>

Source: REMPLAN, 2021

## Wages and Salaries

Wages and salaries refer to the value of entitlements earned by employees from their employers for their employ includes wages and salaries received by employees in cash and in kind (e.g. provision of food, accommodation, or motor vehicles), and employers' social contributions such as superannuation contributions and workers' compensation premiums (Source: Australian Bureau of Statistics Cat. 5209.0.55.001).

In the Gascoyne region, tourism supports the payment of wages and salaries with a total value estimated at \$41.928 million. This represents 9.1% of total wages & salaries. Of the total wages & salaries supported by tourism in the Gascoyne region:

- \$18.924 million is generated by tourism in Carnarvon (45.1%),
- \$17.178 million is generated by tourism in Exmouth (41%),
- \$5.748 million is generated by tourism in Shark Bay (13.7%).



**Table 11. Total Wages and Salaries in the Shire of Shark Bay.**

Industry sector	Gascoyne Region	Shark Bay
Mining	\$69,986,337	\$8,030,612
Public Administration & Safety	\$62,264,298	\$4,465,255
<b>Tourism</b>	<b>\$41,927,900</b>	<b>\$5,747,628</b>
Construction	\$39,105,867	\$1,029,603
Education & Training	\$37,789,653	\$2,167,364
Health Care & Social Assistance	\$32,862,004	\$0.00
Transport, Postal & Warehousing	\$28,635,783	\$1,470,530
Retail Trade	\$25,746,448	\$1,980,973
Agriculture, Forestry & Fishing	\$25,403,960	\$1,565,658
Administrative & Support Services	\$24,055,035	\$1,088,424
Professional, Scientific & Technical Services	\$19,967,700	\$521,230
Other Services	\$11,443,725	\$1,630,409
Manufacturing	\$8,704,220	\$358,205
Rental, Hiring & Real Estate Services	\$7,360,300	\$0.00
Wholesale Trade	\$6,640,256	\$0.00
Electricity, Gas, Water & Waste Services	\$6,448,619	\$0.00
Accommodation & Food Services	\$4,893,966	\$891,884
Arts & Recreation Services	\$3,465,432	\$791,742
Financial & Insurance Services	\$3,001,846	\$0.00
Information Media & Telecommunications	\$273,424	\$0.00
Ownership of Dwellings	\$0.00	\$0.00
<b>Total</b>	<b>\$459,976,773</b>	<b>\$31,739,517</b>

Source: REMPLAN, 2021

## Value Add

Value added reflects the marginal economic value that is added by tourism related activities estimated by subtracting expenditure on intermediate goods and services from tourism output (gross revenue). Estimating the value added helps to understand tourism's contribution to the region's Gross Regional Product.

In the Gascoyne region, the value added by tourism is estimated at \$87.142 million. This represents 7.2% of total value added by all industries. Of the total value added by tourism:

- \$38.912 million in value is contributed by tourism in Carnarvon (44.7%),
- \$35.542 million in value is contributed by tourism in Exmouth (40.8%),
- \$12.585 million in value is contributed by tourism in Shark Bay (14.4%).

**Table 12. Total Value Add for the Shire of Shark Bay.**

Industry sector	Gascoyne Region	Shark Bay
Mining	\$398,054,852	\$21,091,088
Agriculture, Forestry & Fishing	\$125,347,086	\$6,162,320
<b>Tourism</b>	<b>\$87,142,104</b>	<b>\$12,584,810</b>
Ownership of Dwellings	\$85,778,913	\$6,623,679
Public Administration & Safety	\$77,225,538	\$5,342,896
Construction	\$75,758,015	\$1,896,345
Transport, Postal & Warehousing	\$69,484,424	\$3,321,172
Education & Training	\$42,713,220	\$2,508,872
Health Care & Social Assistance	\$39,895,844	\$0.00
Retail Trade	\$39,810,173	\$3,063,058
Administrative & Support Services	\$28,984,820	\$1,381,259
Professional, Scientific & Technical Services	\$27,674,497	\$722,633
Electricity, Gas, Water & Waste Services	\$22,118,406	\$0.00
Rental, Hiring & Real Estate Services	\$17,913,122	\$0.00
Other Services	\$16,090,208	\$2,063,936
Financial & Insurance Services	\$14,647,574	\$0.00
Manufacturing	\$14,512,337	\$1,018,475
Wholesale Trade	\$10,925,374	\$0.00
Accommodation & Food Services	\$8,559,617	\$1,555,096
Arts & Recreation Services	\$7,326,077	\$1,939,671
Information Media & Telecommunications	\$617,075	\$0.00
<b>Total</b>	<b>\$1,210,579,277</b>	<b>\$71,275,310</b>

Source: REMPLAN, 2021

## Visitor Expenditure Per Dollar

This report details how, on average, a dollar spent by a visitor to the Gascoyne region benefits local industries. The industry sector in the Gascoyne Region which captures the most value from visitor expenditure is Accommodation & Food Services estimated to capture \$0.632 for every dollar spent by visitors to the Region.

**Table 13. Visitor Expenditure per Dollar in the Shire of Shark Bay.**

Industry sector	Gascoyne Region	Shark Bay
Agriculture, Forestry & Fishing	\$0.02	\$0.01
Mining	\$0.00	\$0.00
Manufacturing	\$0.02	\$0.00
Electricity, Gas, Water & Waste Services	\$0.00	\$0.00
Construction	\$0.00	\$0.00
Wholesale Trade	\$0.00	\$0.00
Retail Trade	\$0.03	\$0.01
Accommodation & Food Services	\$0.63	\$0.74
Transport, Postal & Warehousing	\$0.11	\$0.05
Information Media & Telecommunications	\$0.00	\$0.00
Financial & Insurance Services	\$0.00	\$0.00
Rental, Hiring & Real Estate Services	\$0.00	\$0.00
Professional, Scientific & Technical Services	\$0.00	\$0.00
Administrative & Support Services	\$0.07	\$0.03
Public Administration & Safety	\$0.00	\$0.00
Education & Training	\$0.01	\$0.01
Health Care & Social Assistance	\$0.00	\$0.00
Arts & Recreation Services	\$0.02	\$0.04
Other Services	\$0.00	\$0.00
Ownership of Dwellings	\$0.09	\$0.11
<b>Total</b>	<b>\$1.00</b>	<b>\$1.00</b>

Source: REMPLAN, 2021

### KEY FINDINGS

- Employment profile – 95 jobs are supported by tourism in the Shire of Shark Bay.
- Tourism output – is estimated at \$30,282M for the Shire of Shark Bay.
- Wages and Salaries – \$5.7M generated by tourism in the Shire of Shark Bay.
- Value Add – \$12,585M contributed by tourism in the Shire of Shark Bay.

## Section 7. Desktop Review of Current Tourism Information, Values and Strategies Impacting Tourism Development in Francois Peron National Park

To determine current tourism information, values and strategies impacting tourism development in FPNP and the FPHP, a mind map of key themes and words was developed which are outlined in Figure 4. These themes and keywords were used in secondary research.

Figure 4. Mind map of Key Themes and Words.



## Tourism Structure

The structure of tourism in Australia is multi-layered comprising of organisations at the national, state, and local level. Nationally, tourism is represented by Tourism Australia (TA) which markets Australia internationally. Active in fifteen (15) key markets, activities include advertising, public relations and media programs, trade shows and industry programs, consumer programs, online communications, and consumer research. Its vision is to make Australia the most desirable destination for first time visitors and memorable destination globally for repeat visitors. In April 2021, 'Reimagining the Visitor Economy' was announced as an expert panel, led by the Hon. Martin Ferguson AM, to advise industry and government on the future of Australia's visitor economy due to the impact from COVID-19 on the Australian tourism industry, examining trends, issues, and opportunities. Their report has identified 31 key findings and a number of opportunities which will reignite the draft of the Tourism 2030 strategy which was paused in 2020 (Austrade, 2021).

At the state level, Tourism WA is responsible for marketing WA as a tourism destination to both the intrastate and interstate markets, growing tourism to the state, marketing WA as a tourism destination, attracting and promoting world class events, and improving access, accommodation, and tourism experiences (Tourism Western Australia, 2021). Key partners who assist in driving tourism into the state include the Regional Tourism Organisations comprising Australia's Coral Coast, Business Events Perth, WA Visitor Centres, Western Australian Indigenous Tourism Operators Council, and Tourism Council WA.

Figure 5 outlines the structure of tourism in Australia from the national to the local level.



Figure 5. Tourism Structure at National, State and Local Level.



Tourism WA provides specialist reports for a range of activities including dark sky, cycle tourism, coastal precincts, Aboriginal tourism, as well as development support for tourism attractions. One area where research has been conducted is the Ningaloo-Shark Bay National Landscape, one of sixteen (16) national landscapes in the Australian National Landscape Program. The program is a partnership between tourism and conservation agencies and implemented across all government levels. The 'Ningaloo – Shark Bay National Landscape Experience Development Strategy' (Tourism WA, 2014) supports the program and outlines three (3) priority themes and nine (9) hero experiences that will strengthen the experience and brand for the Ningaloo-Shark Bay national landscape:

1. Unexpected encounters:
  - a. Get up close and personal with an ocean character on their annual journey home,
  - b. Met a friendly local who is grazing on nature's bounty and retell the story from the comfort of your camp,
  - c. Find a place rarely seen, wait and watch it come to life.
2. Outback and ocean discovery:
  - a. Discover the origins of life on earth,
  - b. Explore spectacular tropical reefs, coast and islands or the real outback without the crowds,
  - c. Fill your camera with unbelievable moments in the landscape.
3. Conservation through participation:
  - a. Get off the beaten track with an eco-accredited operator whose business makes a positive environmental impact,
  - b. Be part of caring for country working with the world's oldest living culture and teams of dedicated locals,
  - c. Work, side-by-side with world experts to protect this place for future generations.

Actions plans have been developed to implement key hero experiences for each of the priority themes.

A number of projects and action are relevant to the Francois Peron Heritage Precinct:

- Theme 2 – link future investment with eco-accommodation to a global certification standard for ecologically sustainable design,
- Theme 2 – outback discovery by four-wheel drive trips to Francois Peron National Park,
- Theme 6 – investigate the appropriate campsites and infrastructure to establish overnight camps where commercial options or existing camps are not available,
- Theme 7 – review interpretation and story-telling techniques used to ensure they meet contemporary visitor expectations for use of digital and interactive methods,
- Theme 7 – investigate the feasibility of installing wildlife viewing and monitoring cameras in both the marine and terrestrial environments,
- Theme 7 – develop day and overnight voluntourism experiences for the long-haul drive market focussing on wildlife interaction and engagement,

Australia's Coral Coast is one of five (5) key tourism marketing regions within and funded by the Government of Western Australia. It is the peak tourism body responsible for branding, positioning, marketing, and driving visitation to the coastal region of Western Australia. The aim of the organisation is to develop and market Australia's Coral Coast as Western Australia's premier holiday destination and provide industry leadership that will accelerate the sustainable growth of tourism to the region. This will be achieved through marketing activities, effective branding, building capacity of tourism operators, and supporting and encouraging operators (Source: <https://www.australiascoralcoast.com> ).

The Western Australian Indigenous Tourism Operators Council (WAITOC) is a membership based not-for-profit association representing Indigenous tourism in Western Australia. The Association is autonomous and provides advice and information to all relevant State Government agencies as well as the tourism industry sector. WAITOC promotes Aboriginal tourism and provides a supportive network for Aboriginal tourism operators within Western Australia focusing on marketing, advocacy, product development and industry partnerships. The 'WAITOC Strategic Plan 2019 – 2025' (n.d.) highlights the objective of positioning WA as the premier Aboriginal tourism destination, increasing Aboriginal cultural experiences, working together to build sustainable futures, focusing on marketing, and cultivating a resilient WAITOC.

## Supporting Tourism

Supporting tourism at the federal level is the Regional Development Australia Mid West Gascoyne whose aim is to support their communities through engagement, ideas generation and development strategies for progress. As a growth sectors in the region, tourism plays a key role in wealth creation to support economic and social development in the region.

The Government of Western Australia's '**State Planning Strategy 2050**' (2014) (SPS) is the primary document within State Government providing a strategic framework for planning and development throughout the state. It provides a vision for sustained growth and prosperity to 2050, and is underpinned by core principles, strategic goals and directions which will shape the land-use and planning of Western Australia (Figure 3).

Figure 6. State Planning Strategy 2050, Structure.

VISION: SUSTAINED GROWTH AND PROSPERITY			
Diverse	Liveable	Connected	Collaborative
PRINCIPLES			
Community	Infrastructure	Economy	Regional development
	Environment	Governance	
STRATEGIC GOALS			
Global competitiveness	Strong and resilient regions	Sustainable communities	
	Infrastructure planning and coordination	Conservation	
STRATEGIC DIRECTIONS			
1. Economic development	2. Physical infrastructure	3. Social infrastructure	
1.1 Resource economy	2.1 Movement	3.1 Spaces and places	
1.2 Knowledge transfer	2.2 Water	3.2 Affordable living	
1.3 Tourism	2.3 Energy	3.3 Health and wellbeing	
1.4 Agriculture and food	2.4 Waste	4. Environment	
1.5 Remote settlements	2.5 Telecommunications	5. Security	
1.6 Land availability			
ACTION PLANNING			
	Implementation	Evaluation	

Source: State Planning Strategy 2050, Government of Western Australia (2014)

Regional development is considered a key principle, with strong and resilient regions one of five strategic roles. Sixteen strategic directions are placed to shape the context of the strategy with tourism considered a key economic development direction to shape tourism in Western Australia.

The 'Jina: Western Australian Aboriginal Tourism Action Plan 2021 – 2025' is an 'action plan with an accountable set of actions to drive tangible outcomes. It provides government with an agreed approach to align, collaborate and communicate cross-agency activities aimed at growing a diversified and sustainable Aboriginal tourism sector for Western Australia' (Tourism Western Australia, 2021c). It is anticipated that over the years 2021 to 2025, the Government of Western Australia will work with the WAITOC and Aboriginal tourism industry to encourage, integrate, showcase, and promote Aboriginal tourism in WA. The vision of 'Western Australia is the premier authentic Aboriginal tourism destination in Australia' will be achieved through a partnership approach with Tourism WA across three (3) key areas:

1. Positioning WA as the premier Aboriginal tourism destination,
2. Building the capacity for Aboriginal people to enter the tourism sector,
3. Facilitating the development of Aboriginal cultural experiences.

The four (4) year plan is backed by a \$20 million Aboriginal Tourism Fund and will support a range of initiatives:

1. The development of new Aboriginal tourism experiences,
2. More Aboriginal people working in the tourism industry,
3. The development of administration and booking systems to support Aboriginal tourism businesses,
4. An increase in tourism experiences on the Dampier Peninsula, after the Cape Leveque Road was sealed in 2020.

The Shire of Shark Bay's 'Local Tourism Planning Strategy' (2014) (LTPS) was written in response to the Shark Bay Local Tourism Planning Strategy brief, to develop a strategy that fits the Shark Bay vision:

Shark Bay is a proud unified community, respecting and sharing our pristine environment and celebrating our great lifestyle.

The LTPS investigated the land use of areas not controlled by Local Government such as the Francois Peron

National Park and analysed how new projects in these areas may impact requirements for additional tourism development sites. A number of recommendations were made to achieve tourism outcomes in the Shire of Shark Bay which either incorporate Francois Peron National Park or enhance the visitor experience through the accommodation and tourism provision:

- Recommendation 4 - Linking the communities of Denham and Monkey Mia with better access to Francois Peron National Park,
- Recommendation 5 - The need for a partnership between the World Heritage property managers and tourism agencies is essential for successful marketing of the World Heritage,
- Recommendation 6 - The development of nature based or ecotourism accommodation experiences,
- Recommendation 7 - The community of Shark Bay has to connect with its World Heritage surrounding and take responsibility for the area; this can only be achieved through participation,
- Recommendation 9 - Opportunities to further develop Voluntourism,
- Recommendation 21 - Increasing visitor occupancy in Shark Bay,
- Recommendation 22 - The further development of an events program that stimulates visitation,
- Recommendation 24 - Tourism product packaging for easier customer purchase.

A number of government departments support the tourism industry through economic, social, and environmental goals providing growth and sustainability for both in the city and the regions.

The Gascoyne Development Commission (GDC) is the WA government statutory authority dedicated to the economic and social development of the Gascoyne region. The Commissions function is to take necessary steps to promote, facilitate and monitor development in the region by broadening the economic base, maximising job creation, and improving career opportunities. Various reports have been published through the GDC which highlight the importance of tourism to both economic development and enhancing the social fabric of the region:

- 'Gascoyne Regional Tourism Strategy 2014' - the three key focus areas for the strategy include visitor experience, growing the industry and development products and services, with the three themes of connect and collaborate, capacity build and contribute value used as intertwining parts of the framework for the strategy (Gascoyne Development Commission, 2014, 6). The Tourism Strategy includes a range of new and renewed product opportunities including specifically for Shark Bay:
  - Eco-tourism ventures including with an Indigenous component,
  - Development of nocturnal fauna tours - Francois Peron National Park.

Both product opportunities were identified by stakeholders during the consultation process in the development of the Tourism Strategy and is consistent with the outcomes of the stakeholder consultation during the development of this report.

'Gascoyne Aboriginal Land and Sea Management Strategy' (Aboriginal Diversity Conservation, 2016) (GALMS) is seen as an important contribution to the future Aboriginal workforce of the region. A social investment for generational participation in Aboriginal Economic development (Aboriginal Biodiversity Conservation, 2016, 4) whose objective is to provide innovative direction for implementation of Aboriginal Land and Sea Management Projects within the Gascoyne Bioregion. The consultation process conducted in the development of the GALMS highlighted aspirations which initiated the recommendations for implementation of a project for the region, including cultural tourism development, jobs for the Indigenous community in the region, cultural heritage protection and shared knowledge. Specific project opportunities were highlighted and include:

- **Co-management 3.2** - Assist Native Title Working Group and Aboriginal organisations working with Yamatji Marlpa Aboriginal Corporation (YMAC) and Department of Parks and Wildlife (DPaW) to negotiate co-management arrangements that support start-up projects for Yinggarda, Baiyungu and Malgana land and sea management teams,



- **Aboriginal tourism 4.1** - Working closely with the Gascoyne Tourism Board Inc, Tourism WA, WAITOC, DPaW, landowners, and local Aboriginal Tour Operators to establish a Cultural Tourism Corridor to include day and overnight Cultural tours from Shark Bay, Carnarvon, Kennedy Ranges and Mt Augustus.
- **Aboriginal tourism 4.4** - Work in partnership with Aboriginal tourism operators and/or aspiring operators to assist in business growth through strategic alliances i.e. RAC and WAITOC.
- **Community Services 8.2** - Work in partnership with the regional LGA's and local contractors to develop (labour type) employment prospects within the region.

'Gascoyne Regional Investment Blueprint' (2015) outlines the vision for the Gascoyne by 2050, and as an internationally recognised tourism destination, has incorporated a vision for growth in the tourism industry from \$222 million in tourism expenditure and 500 people in the workforce in the region in 2015 to \$686 million and 1,334 in the workforce in the region by 2050. As a 'regional imperative', 'Tourism – Destination First Choice' has been identified as central to the economic prosperity of the Gascoyne (Gascoyne Development Commission, 2015, 15). Of the six (6) transformational pillars, tourism is identified as an opportunity in:

- **Developing industries and markets** - With two World Heritage Areas, numerous National parks, and inclusion in Tourism Australia's iconic National Landscapes program, the region has the opportunity to enhance its tourism potential through a collaborative regional approach. Private sector investment is essential in the development of tourism attractions and accommodation, while an integrated tourism offering with associated branding and marketing has been identified as a key requirement for the sector.
- **Improving regional accessibility and connectivity** - Better transport options will further enable the food and tourism industries to achieve their potential, nationally and internationally.
- **Encouraging innovation** – new opportunities exist in facilitating the development of new ideas in the arts, enabling greater creativity and partnerships, leading to new economic and social benefits, and eco-accommodation and adventure tours in remote tourist areas,
- **Developing Aboriginal & small business economic capacity** - The Gascoyne is centrally located on the coast of Western Australia and adjacent to mining areas in the Pilbara and Mid West regions. With the attraction of investment into pastoral, tourism and supply chains, small businesses have a number of opportunities to expand and prosper.

The Department of Biodiversity, Conservation and Attractions is the state government department which promotes diversity and conservation through sustainable management of WA's species, ecosystems, lands, and attraction in their care. They work to conserve WA's biodiversity, cultural and natural values while providing world-recognised nature-based tourism and recreation experiences for the community (Department of Biodiversity, Conservation and Attractions, 2018). Their strategic directions for 2018 to 2021 include supporting economic development by creating sustainable nature, heritage and recreation opportunities and delivering quality, accessible and affordable opportunities to experience attractions, including national parks by providing, improving and promoting WA's attractions as key tourism and community assets, creating appropriate opportunities for private sector investments and partnerships, and educating inspiring and welcoming the community, including local people and visitors (Department of Biodiversity, Conservation and Attractions, 2018).

The Department of Local Government, Sport and Cultural Industries have established strategic directions for the period 2020 to 2023 with its mission to enable dynamic and inclusive communities and support the WA economy by encouraging and enabling understanding of the history of WA, including Aboriginal cultures, as context for contemporary society. Six (6) objectives are outlined including promoting and enhancing the benefits of cultural diversity and social inclusion, and to celebrate Aboriginal culture and preserve history and traditions. Strategies to support these objectives is highlighted through a number of programs including the regional Aboriginal community's framework, support Aboriginal cultural centre, and the culture and values program.

World Heritage plays a key factor in ensuring the conservation of this environmentally and culturally significant area. The Shark Bay region was inscribed on the World Heritage List in 1991 due to its significance as a meeting point of three (3) major climatic regions, containing plant species that are unique and considered new to science, five (5) or Australia's twenty-six (26) species of endangered Australian mammals, 35% of Australian

bird species and abundant marine flora and fauna. Due to its 'outstanding universal value', it is necessary to remain compliant with the World Heritage Convention adopted by the United Nations Educational, Scientific and Cultural Organisation (UNESCO). The 'Operational Guidelines for the Implementation of the World Heritage Convention' (2019) provide procedures which aim to facilitate the implementation of the 'Convention concerning the protection of the World Cultural and Natural Heritage' (Convention). Additionally, the Australian Government, through the Department of Agriculture, Water, and the Environment, has developed primary management objectives as part of their ongoing obligations under the Convention for each of the Australian World Heritage sites:

- To protect, conserve and present the World Heritage values of the property,
- To integrate the protection of the area into a comprehensive planning program,
- To give the property a function in the life of the Australian community,
- To strengthen appreciation and respect of the property's World Heritage values, particularly through educational and information programs,
- To keep the community broadly informed about the condition of the World Heritage values of the property,
- To take appropriate scientific, technical, legal, administrative, and financial measures necessary for achieving the foregoing objectives.

In achieving these primary objectives due regard is given to:

- Ensuring the provision of essential services to communities within and adjacent to a property,
- Allowing provision for use of the property which does not have a significant impact on the World Heritage values and their integrity,
- Recognising the role of current management agencies in the protection of a property's values,
- The involvement of the local community in the planning and management of a property.

An online framework, 'Managing World Heritage in Australia: An online framework guide to best practice World Heritage Management', provides best practice principles and showcases their application in practice. These include:

- Protecting World Heritage,
- Conserving World Heritage,
- Presenting and Sharing World Heritage,
- Indigenous peoples and World Heritage,
- World Heritage in the community,
- Monitoring and reporting,
- Rehabilitation and reuse,
- Resourcing.

A Shark Bay World Heritage Committee consisting of community, scientific and Indigenous representatives oversee the programme of management and administrative structures and planning processes. The 'Shark Bay World Heritage Property Strategic Plan 2008-2020' (Department of Environment and Conservation, 2008) was developed to 'satisfy Australia's obligations under the World Heritage Convention, to fulfil management planning requirements for the Property in accordance with the Australian World Heritage Management Principles established by Regulation under the Commonwealth's Environment Protection and Biodiversity Act (1999), to satisfy the requirements of the State-Commonwealth agreement, and to address the protection, conservation and presentation of the World Heritage values of Shark Bay. It provides a statement about what all levels of

government and the community want the future to be and how it can be achieved, providing management direction and guidance to ensure the vision is reached' (Department of Environment and Conservation, 2008).

The DBCA, formally the Department of Environment and Conservation (DEC) is the lead management agency for the Shark Bay World Heritage Property. In this respect, DBCA is responsible in the World Heritage Property for:

- overseeing development of management plans (terrestrial and marine),
- liaising with agencies and other parties to ensure that development and management activities do not threaten the Property's outstanding universal values,
- conducting or encouraging relevant research,
- compiling and maintaining a comprehensive database for management purposes,
- managing terrestrial and marine estate it has legislative responsibility for,
- distributing information and implementing promotional activities.

It is necessary to ensure that proposed activities or developments within or outside the World Heritage Property do not have an unacceptable impact on World Heritage values. The Commonwealth's Environment Protection and Biodiversity Conservation Act (1999) provides the framework under Commonwealth legislation for the environmental impact assessment of relevant activities affecting the World Heritage Property. Under this Act actions which are likely to have a significant impact on:

- the World Heritage values of the Shark Bay World Heritage Property,
- any nationally threatened species or endangered ecological community in the Shark Bay World Heritage Property,
- internationally protected migratory species in the Shark Bay World Heritage Property, must be subject to a rigorous environmental impact assessment process. This process may be a Commonwealth process or a State process that has been accredited by the Commonwealth as meeting appropriate criteria (Department of Environment and Conservation, 2008).

Other Acts and Strategies which may impact on the World Heritage site include:

- Bush Fires Act 1954 (Government of Western Australia, 2021), for fire mitigation and strategies to prevent destruction of areas in the Site,
- ROADS 2020 Regional Road Development Strategy (Main Roads, 1997) which has identified the potential need to upgrade the access road into FPNP due to increased visitation however has not been identified in the ROADS 2030 Regional Road Development Strategy (Main Roads, 2013),

## KEY FINDINGS

- The Australian National Landscape Program includes the 'Ningaloo – Shark Bay National Landscape Experience Development Strategy' with three (3) priority themes – unexpected encounters, outback and ocean discovery and conservation through participation, and a number of projects and actions which support and are relevant to Francois Peron Heritage Precinct.
- WAITOC is currently working on positioning WA as the premier Aboriginal tourism destination by increasing Aboriginal experiences.
- The State of Western Australia through the 'Jina: Western Australian Aboriginal Tourism Action Plan 2021 – 2025' will work with WAITOC and Aboriginal tourism industry to not only position WA as the premier Aboriginal tourism destination but build capacity for Aboriginal people to enter the tourism sector and facilitate the development of Aboriginal cultural experiences. The four (4) year plan is supported through a \$20M Aboriginal tourism fund and support a range of initiatives.
- The Shire of Shark Bay's 'Local Tourism Planning Strategy' (2014) provides a number of recommendations made to achieve tourism outcomes in the Shire of Shark Bay which either incorporate Francois Peron National Park or enhance the visitor experience through the accommodation and tourism provision.
- The 'Gascoyne Aboriginal Land and Sea Management Strategy' (2016) outlines project opportunities for co-management, Aboriginal tourism, and community services within the Gascoyne Bioregion.
- The 'Gascoyne Regional Investment Blueprint' (2015) recognises tourism as central to economic prosperity of the Gascoyne.
- The UNESCO guidelines, the 'Operational Guidelines for the Implementation of the World Heritage Convention' (2019), are underpinned by the Australian governments' primary management objectives through the Department of Agriculture, Water, and the Environment. An online framework provides best practice principles and showcases their application in practice.
- A Shark Bay World Heritage Committee consisting of community, scientific and Indigenous representatives oversee the programme of management and administrative structures of planning and processes of the FPNP.
- It is necessary to ensure that proposed activities or developments within or outside the World Heritage Property do not have an unacceptable impact on World Heritage values. The Commonwealth's Environmental Protection and Biodiversity Conservation Act (1999) provides the framework under Commonwealth legislation for the environmental impact assessment of relevant activities affecting the World Heritage Property. Under this Act actions which are likely to have a significant impact on:
  - the World Heritage values of the Shark Bay World Heritage Property,
  - any nationally threatened species or endangered ecological community in the Shark Bay World Heritage Property,
  - internationally protected migratory species in the Shark Bay World Heritage Property, must be subject to a rigorous environmental impact assessment process. This process may be a Commonwealth process or a State process that has been accredited by the Commonwealth as meeting appropriate criteria (Department of Environment and Conservation, 2008).

## Section 8. Masterplan Concept

Semi-structured questions to evaluate the strengths, weaknesses, opportunities, and threats (SWOT) of the tourism opportunity for the FPHP were incorporated into the workshop and stakeholder meetings and are highlighted in Figure 7. Key themes evolved throughout the workshop and meetings:

- Strengths were based around the hot springs which were consistently highlighted as an attraction which can be further enhanced and the health benefits of artesian water, as well as there being no Development Application Approval for the FPHP,
- Weaknesses include the accessibility for 4WD only, the limited accommodation options when both Denham and Monkey Mia are at capacity, the current issue with entrance fees to Monkey Mia Conservation Park, and the current facility is not well marketed,
- Opportunities include strengthened connections with the Malgana people, increase in investors in Shark Bay, nocturnal tourism, activation space in the hot spring area, breeding location to provide an alternative animal attraction to the dolphin experience at Monkey Mia, opportunity for inclusion of Aboriginal tourism content, and accommodation alternatives including glamping and school groups.
- Threats include the potential loss of the 'old' Shark Bay identity, loss of the hot springs or the water losing its ability for thermal heating, excessive tourism numbers visiting FPHP, and the limited accommodation options for any current and future staff employed at FPHP,

Many of the opportunities and weaknesses have been addressed in the context of Business Opportunity in Section 8.

Activities that have been discussed or addressed in previous feasibility or studies include:

- A fauna viewing facility that enables visitors to experience native nocturnal fauna and learn about 'Return to 1616', a \$44 million ecological restoration project on Dirk Hartog Island National Park that has achieved the eradication of sheep, goats and feral cats and commenced the translocation of 12 threatened mammal and one bird species by 2030. Four species had been reintroduced so far – rufus and banded hare-wallabies, duffers, and Shark Bay bandicoots. Other species to be translocated to help their survival include Shark Bay mouse, woylie, heath mouse and chuditch.
- A café/lunch bar to service precinct visitors and those travelling to and from further reaches of the Francois Peron National Park. There may be a possibility for the provision of dinner at night as well for visitors to the animal enclosure.
- A business opportunity to build on the hot tub experience. The original Peron homestead bore was drilled in 1923 to a depth of 542m and was the first artesian bore on the Peron Peninsula. The bores were initially drilled to provide greater quality water for the stock on the pastoral land that used to occupy the area. When it was measured by DBCA staff in 2011, flow rates were found to have dropped to 1.5L/sec, giving a total potential yield of approximately 47ML per annum. The bore is currently running at close to full capacity, with usage of approximately 46ML/year (Endemic, 2011). Today, visitors enjoy a dip in the hot water, and view emus and other birds that flock to drink in the overflow from the 'hot tub'.



Figure 7. SWOT Analysis of the Francois Peron Heritage Precinct Tourism Business Opportunity.



- There has been discussion regarding the development of accommodation and camping on the site. The Park Management Plan acknowledges the intention to 'further develop Peron Homestead as a two-wheel drive recreation and tourism destination for visitors by providing sealed access, visitor information, interpretation, education, day use, and overnight stays for special interest groups and nature-based commercial tourism opportunities whilst retaining the area's heritage and pastoral character'.
- The plan recognises the opportunity for built accommodation at the homestead although it indicates that the accommodation will cater for groups assisting the department including school groups, volunteers, special interest groups or groups undertaking training activities. It indicates an intention to investigate commercial tourism opportunities at other locations in the park and to provide a two-wheel drive accessible bush camping area in South Peron, subject to assessments. Under the 'Conservation and Land Management Act 1984' (Department of Conservation and Land Management, 1984), any lease or licence for commercial tourism operations must be consistent with the purpose of the national park and the park management plan.

## Existing Infrastructure

The FPHP currently comprises the Homestead that is used by community groups, volunteers and visiting staff, as well as a shearing shed, sheep yards, and shearer's quarters that form part of an interpretive trail. The site also features a hot tub filled with hot artesian water, a small bird hide, picnic facilities, parking, and an ablution block. An analysis of the existing infrastructure at FPHP was conducted during the site visit which is outlined in Table 14.

**Table 14. Analysis of Existing Infrastructure at Francois Peron Heritage Precinct.**

Facility	Image	Description
Homestead		Homestead has limited significant heritage value. Current works on the building will be adequate for immediate current use and potential for staff housing/quarters. Further refurbishment may be required to meet future staffing requirements based on the Project Concept plan.
Old Shearer's Quarters		Building is run-down and requires extensive works. Exterior may be restored for authenticity; building infrastructure will require significant reinforcement; floor will require significant work; interior will require redesign and refurbishment to meet Project concept and be fit-for-purpose.
Shearer's Cookhouse & Mess		Building is run-down and requires extensive works. Exterior may be restored for authenticity; building infrastructure will require significant reinforcement; floor will require work; interior will require refurbishment. Current layout is suitable for Project purpose.

Shearing Sheds		Visitors can interact with some machinery which is still in relative working order. Sheds are old but well-maintained and offer visitors a glimpse into the shearing process through the interpretive signage and machinery. Some building repairs may be required. Interpretation provides good information however there are more current interpretive tools that may be more suitable to the environment.
Work Sheds		The work sheds are adequate for their current and proposed future use. They are of adequate size for large works storage – vehicles, machinery, station equipment.
Hot Tub		'Authentic' in nature with its natural artesian water, the hot tub presents as an outback tub surrounded in corrugated tin with a 'plastic' inner coat. There is potential for the hot tub to be more aesthetically appealing for visitors with the pipes covers, and external tin covering replaced more frequently.
BBQ Area		Two BBQs and two picnic tables in good and clean condition. The BBQ area can be expanded to incorporate future proposed usage for nature-based events, astrotourism events, and meeting the requirements for increase in visitors.
Interpretive Centre		Provides artwork and interpretation regarding life at FPNP for the local Indigenous community and European settlers who managed the pastoral station at FPHP. There is also information regarding Project Eden. The history of the land is depicted through artwork on the walls/wall murals. New methods of interpretation could be sought to further enhance the Centre, as well as additional information to support key dates.

Toilets/Changing Rooms		<p>The facility provides adequate ablutions for the hot tub, BBQ area and current visitor usage. Proposed extension of the area will require additional ablutions blocks and facilities as well as sewerage infrastructure. Community has expressed desire for updated/expanded toilets and changerooms.</p> <p>The external tin covering could be replaced more frequently to enhance its aesthetic appeal.</p>
Animal Enclosures		<p>This infrastructure is still in partial use. The enclosure is sheathed in netting however once the current use of the enclosure has ceased, it would not be considered fit-for-purpose for future use as a captive animal area. Future use would require an upgrade to the facilities depending on types of animals/marsupials being housed.</p>
Walking Trails		<p>Pepper Trail is short and flat and informs the visitor of the history of the Precinct through interpretive signage. Alternative interpretive tools could be considered that would be more suited to the environmental conditions.</p>
Visitor Bay		<p>Features interpretive displays and signage for visitors to the Francois Peron Nature Park and Heritage Precinct.</p>

## Visual Concept Plan

The visual concept plan has been developed taking into consideration a number of factors including compliance with state and federal legislation and regulations and global conventions, previous concept development plans such as the 'Peron Homestead Concept Development Plan' (Department of Conservation and Land Management, 2003), relevant feedback from stakeholder engagement, visitation to precincts of similar nature with similar attractions, and secondary research including reports from DBCA and Tourism WA.

As FPNP is a 'Class A' reserve gazetted as a national park, care and consideration has been given to providing a concept that remains authentic to objects of the 'Shark Bay Terrestrial Reserves and Proposed Reserves Additions, Management Plan No 75 2012' (Department of Environment and Conservation, 2012) in three (3) key areas: management objectives, visitor management settings, and tourism and commercial operations.

### 1. The management objectives:

Fulfil so much of the demand for recreation as is consistent with the proper maintenance and restoration of the natural environment, the protection of indigenous flora and fauna, and the preservation of any features of archaeological, historic, or scientific interest.

National parks have national significance for scenic, cultural, or biological values, and can accommodate recreation this is consistent with maintaining these values.

2. The visitor management settings:

The establishment of visitor management settings across the Shark Bay area contributes towards minimising visitor impacts through preventing recreational succession at sites and incremental development of natural areas beyond a specified level.

The objective is to provide visitors with a range of nature-based experiences within the planning area whilst ensuring the environmental impacts are managed with acceptable limits.

The provision of recreation and tourism opportunities, facilities and services in a given area should consider what is provided in neighbouring areas to allow the greatest diversity of opportunities and avoid duplication.

3. Tourism and commercial operations:

It is important that, such tourism developments do not adversely impact on World Heritage and other key values, and this is monitored through an approvals process.

The provision of low-impact, nature-based-accommodation encourages visitors to interact with and understand the natural, cultural, and historical features of an area.

For all tourism developments, a process of assessing potential sites and development opportunities is undertaken prior to the advertisement of an EOI. Sites on Department-managed land area assessed against a range of sustainability indicators including:

- The protection of the natural environment,
- The built environment,
- The social environment,
- The business environment.

*(Department of Environment and Conservation, 2012).*



The Project Team was introduced to the FPHP site by Mr Steve Nicholson, District Manager, Shark Bay District, Parks and Wildlife Service, DBCA and Ms Sue Hancock, Regional Leader Parks and Visitor Services, Parks and Wildlife Service, DBCA on Thursday, and Friday, 17 and 18 June 2021. A walk-through followed by a drive through providing an oversight of the extent of the site, existing infrastructure, and opportunity for development.

A tourism carrying capacity construct has been applied as the overarching quantitative method to determining a proximal number of visitors for each of the Stages. Avoiding overtourism in the FPHP is essential in ensuring economic, social, and environmental sustainability for FPHP. As such, the physical carrying capacity (PCC) (Kourandeh and Fataei, 2013) has been calculated based on the FPHP suitable tourism area of each stage, the visitor/area, and a rotational factor. The total visitation numbers outlined in Table 15 are below the PCC for each stage of the Project.

**Table 15. Physical Carrying Capacity of the Proposed Project Stages.**

Physical Carrying Capacity (PCC) Factor	Stage 1	Stage 2	Stage 3
Area	140,000m <sup>2</sup>	160,000m <sup>2</sup>	190,000m <sup>2</sup>
Visitor/Area	1 / 4	1 / 5	1 / 5
Rotational Factor	4	6	6
<b>PCC Total</b>	<b>140,000</b>	<b>192,000</b>	<b>228,000</b>
<b>Project Total</b>	<b>127,000</b>	<b>150,000</b>	<b>158,000</b>

The introduction of various uses at FPHP and the associated increase in visitation will impact on the natural environment and surrounding infrastructure including the accessway from the Denham-Monkey Mia Road to FPHP and further along through the FPNP. To alleviate FPHP visitor and FPNP commuter pressure on the current road, which is currently unsealed, an additional entry point and road is proposed which is currently used as a DBCA only accessway. This 7km unsealed road would provide a more desirable access way due to its historic and relative ungraded nature and alternative route for visitors to the FPHP.

The design provided in the Masterplan provides for the following accommodation:

- Forty (40) campsites in Stage 1,
- Twenty (20) glamping sites in Stage 2,
- Group accommodation in the Shearing Quarters to sleep between sixty (60) and eighty (80) in Stage 2,
- Six (6) self-contained chalets in Stage 3.

The accommodation density has been calculated based on the appropriate planning regulations including the 'Caravan Parks and Camping Grounds Regulations 1997' (Government of Western Australia, 2020 b) which states there is to be at least 3m between camping sites on a facility and any building on the facility that is not a site, and the camp of any person who is not a member of a group, and the Building code of Australia standards. All other guidelines as stated in the Regulations have been considered in the design stage of the visual concept plan.

Currently FPHP operates only public day use facilities and attractions at FPHP with facilities including the hot tub, and attractions including the interpretation centre, limited walking trails and historic buildings such as the Shearing Shed and Shearing Quarters. In the proposed Visual Concept Plan, the current location of the hot tub would be enhanced through an increase in number of hot tubs as well as aesthetic appeal, and development of a small amphitheatre style area for night sky and cultural tours in the current scrub area. Interpretation around site would be upgraded and enhanced through methods such as audio, integration into shelters and pathways and sculptural elements. Trails would be enhanced through clear and concise wayfinding signage around site with buildings clearly identified through consistent naming and style. The Interpretation Centre would be redesigned to incorporate modern storytelling of Malgana cultural heritage, flora and fauna, constellation/night sky, pastoral station history, and the 'Return to 1616' project and Dirk Hartog Island. The Shearers Shed would be renovated and interpretation enhanced, and development of a visitation control point introduced to incorporate a hub, administration, interpretive centre, and snack bar/restaurant.

Consumer analysis and tourism business audit revealed a considerable gap in overnight tourist accommodation options which was disproportionate to the accommodation requirements of visitors to the Shark Bay and Monkey Mia region. The limited accommodation options has the potential to result in tourists by-passing the region rather than staying overnight resulting in lost economic benefit to the Shire of Shark Bay. The Masterplan will feature an accommodation mix in response to the gaps including multiple accommodation options to cater to a variety of tourists - glamping for a high-end experience, group accommodation which utilises the heritage facilities and preserves the Precinct's rustic, organic atmosphere, and campsites and caravan sites for a budget-friendly accommodation option.

There is a market for alternative, natural tourism – adventure, nature-based, wildlife, ecotourism, cultural tourism – heritage, religions, event tourism – sports or festivals; and other forms of tourism such as educational or farm tourism. The Francois Peron Heritage Precinct is a remote location providing opportunity for unique, nature-based experiences. The existing hot spring is currently a drawcard for tourists but can become crowded at times. The Masterplan will expand on and refurbish the existing hot spring facilities to accommodate more tourist activity.

The current access to the Francois Peron Heritage Precinct limits travellers to those with a 4WD. The Master Plan will incorporate budgeting for improved access to facilitate increased visitation to Francois Peron Heritage Precinct.

There is a strong consumer desire for pastoral, conservation, and Indigenous experiences in the area; however, there is currently little on offer to tourists. Flora and fauna viewing, preferably in connection with Indigenous guides, will be included in the Master Plan to alleviate this market gap and provide a tourism incentive.





# Masterplan

## Francois Peron Heritage Precinct

### Legend

#### ○ New Roads

#### ● Stage 1

Roadways  
 Parking x 120 bays + coach & van laydown  
 Pathways for guest access  
 Pathways for staff access  
 Homestead for staffing  
 Managers Quarters 4b/2bath  
 Hot tub extension 1 shared and 6 private  
 Camping x 40, ablutions x 2, camp kitchen  
 Shearers Shed upgrade interpretation  
 Hub/Admin/Tours/Interpretation/Refreshments/Snacks  
 Amphitheatre for night sky, entertainment and general gatherings

#### ● Stage 2

Glamping x 20, ablutions (TBC), Shearers Quarters x sleep 60-80. Renovation to group accommodation, shared ablutions and camp kitchen  
 Refreshments/Snacks upgrade to cafe/licensed bar (60pax)

#### ● Stage 3

Self Contained Chalets x 6. Each Accommodation will house;  
 - 3 bedrooms with bedding as follows - 1 queen (2pax), 1 split king (2pax), 1 x 4 bunks (8pax). Includes sheets, pillows and blankets.  
 - Kitchen with full working facilities, utensils, crockery, cutlery, glassware etc  
 - 2 bathrooms with shower & toilet in each & towelling  
 - Living and lounge area  
 - Dining suite & chairs (indoor & outdoor sets)  
 - 2 car parking bays  
 - Reverse cycle air conditioning





# Artesian Hot Springs

## Stage 1

The aesthetic appeal of the artesian bore bath could be elevated to be a more inviting, spa-like experience. Timber decking could hide the baths pipes/structure, whilst adding landscaping around the perimeter would make it feel cosy and provide more of a personal experience.

The health benefits of artesian water could be promoted as well.

The high mineral content of the Artesian Thermal water includes minerals such as calcium, magnesium, potassium, sulphur & bicarbonate, which are believed to be absorbed into the skin, helping to repair tissue damage and also help the body fight illness. Some of the benefits include:

- Rejuvenation and rehydration of your skin
- Assistance with detoxifying the lymphatic system
- Muscle relaxation and joint pain relief, helpful for those muscular and arthritic problems
- Assistance with sciatica and nerve trouble
- Helpful for people who have trouble sleeping
- Stress relief
- Help with poor circulation
- Provide relief of symptoms eczema, psoriasis and other common skin complaints



Artesian baths at Wooramel Station



Examples of concrete pools with either timber and steel cladding



Artesian baths at Wooramel Station



## Communal Areas

### Stages 1-3

A welcoming, cosy communal atmosphere will help to provide an authentic experience for visitors to the site.

A small amphitheatre-style area could also be used as a starting point for night sky and cultural tours.



Wooramel Station timber seating and fire pits



Wooramel Station stage and lighting



Strathewan Bushfire Memorial



Amphitheatre seating at Alice Springs Desert Park



Bushman's Hill - Wiradjuri Amphitheatre, NSW



Credo Station, Kalgoorlie



# Signage

## Stages 1-3

With the large area and spread of sites in the precinct, clear and concise wayfinding signage is vital for visitors to understand and navigate the site.

Buildings should be clearly labelled and naming consistent throughout the site.

The DBCA does have a style guide for their wayfinding and interpretive signage but some variation from this may be permissible, to allow the site to have it's own personality.

A welcome or acknowledgment of country should be featured close to the entry hub and ideally, in dual language.



Entry signage at Wooramel Station



Site signage at Kalbarri Skywalk



Examples of wayfinding and orientation signage



Welcome signage at Strawberry Hill featuring dual language



Wall-based interpretive signage, Gwalia Historic Precinct



Battery Point Sculpture Signage, Hobart



Freestanding signage, Gwalia Historic Precinct



## Exterior Interpretation

### Stages 1-3

The existing interpretive signage on site has generally weathered well, with only some signs needing to be updated.

Other forms of interpretation can also be woven throughout the site and introduced through other methods such as audio, integration into shelters and pathways and sculptural elements (suitable for the conditions of the site).



Hand-cranked audio posts, Slater Homestead, Goomalling



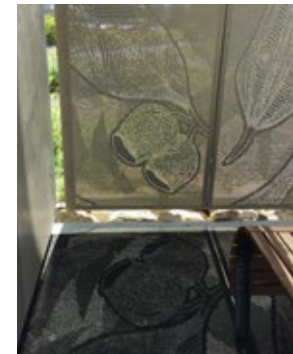
Solar powered audio bench seating, Toodyay



Pathway graphics, Kalbarri Skywalk



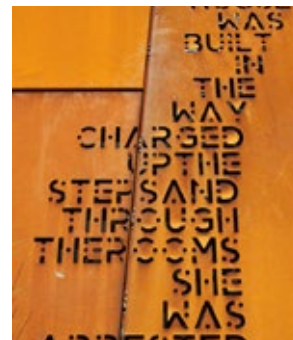
Picnic shelters, Optus Stadium



Interpretive pathway graphics, Optus Stadium



Existing exterior interpretive signage



Interpretive wall, Yagan Square



Location map etched into concrete seating



Interpretive information etched into timber seating



## Interpretive Centre

### Stage 1

Ideally the interpretation (both exterior and interior) would be assessed as a whole, with a full re-design of the interpretive centre using modern story-telling and display narratives recommended (see following page).

Possible interpretation topics could be expanded to include Malagna cultural stories, flora and fauna, constellation/night sky, pastoral station history, and the Return to 1616 project on Dirk Hartog.



Herdsman Lake Discovery Centre



Displays at the Karijini Interpretive Centre



Interpretive displays at the Ningaloo Visitor Centre



Interpretive displays at the Ningaloo Visitor Centre

## Group Accommodation

### Stage 2

The existing Shearer's Quarters would be ideal to convert into group accommodation. The rustic aesthetic would be important to retain.

- Groups of students from varied streams will be suitably accommodated with appropriate ablution and bedding segmentation.
- Social groups, corporate team building, Sporting associations and private functions will find the allocation of bunks, singles and queen bedding options perfect for all needs in the rustic yet comfortable outback experience.
- A centre space between rooms and catering provides open plan for social gatherings, formal meetings, relaxation and group dining.
- The Shearers camp kitchen provides all requirements to self cater or attract a commercial caterer.
- The Francois Peron Cafe/ Bar will also provide group catering to specific budgets and dietary requirements.



Mani Shearers Quarters, Baldry NSW



Credo Station, Kalgoorlie



Shearer's quarters accommodation at Mellenbye Station





# Glamping Accommodation

## Stage 2

Allocated north of the Homestead with sufficient privacy, spacing and positioning to best take in the locational aspects. Organic pathways will direct guests to their cabins from a separate Glamping only car park. bedding, linen, mini fridge & comfortable seating will lift you high enough to take in all of nature's outdoor beauty as if camping, but with the finer comforts. A separate glamping amenities block for warm showers.

- 50% Eco Tents (sleep x2 Queen)
- 50% Family Tents (sleep x4 Queen/ 2 single)
- Ensuites not included at this stage. May review opportunity by developer options.



Cave Hill Creek



Karijini Eco Retreat tents



Karijini Eco Retreat site



Pindering Eco Retreat - Ecostructures tent range



Longitude 131, Uluru-Kata Tjuta National Park, NT



Spicers Canopy Eco Lodge, Maryvale, QLD



Bamurru Plains Safari Bungalows, Kakadu, NT

## Animal Encounters

Guided animal encounters would offer an additional experience to the site, giving visitors the opportunity to interact with the local wildlife in their natural environments.

It would be ideal to schedule these tours at dusk and into the evening once the sun has gone down and temperatures drop. The examples on this page demonstrate twilight tours and include the use of torches or night-vision goggles.

The Twilight Experience in Hobart includes a packed picnic dinner that showcases the local produce of the area. This may be something that can be incorporated into the Francois Peron tours.



Barna Mia Nocturnal Wildlife Experience, Narrogin WA



Whiteman Park Woylie Walk



Night Vision Tour by Vision Eco Tours, Byron Bay



Twilight Experience, Hobart



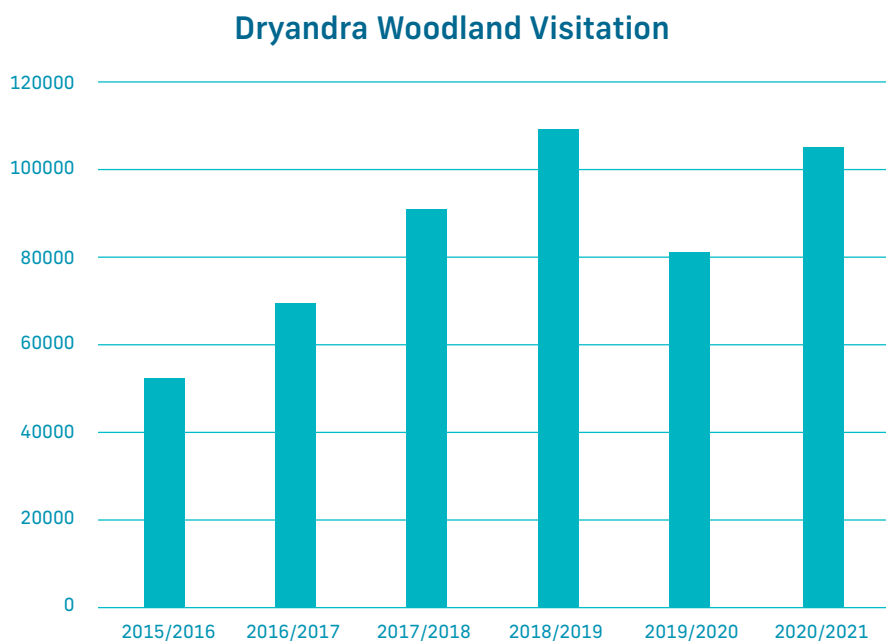
## Other Considerations – Animal Encounter

An animal encounter has been identified through our stakeholder engagement and research (Collett and Tischler, 1998) as a desirable opportunity for tourism project development and visitation growth for Francois Peron Heritage Precinct. To gain an understanding of the type of attraction which may be viable, a familiarisation tour was conducted of Barna Mia Nocturnal Wildlife Experience in the Dryandra Woodland, approximately 180kms south-east of Perth. Managed by the DBCA, Barna Mia is a sanctuary and home for some of Western Australia's native animals facing extinction. The guided nocturnal wildlife experience operates four (4) nights per week allowing maximum 25 visitors per tour. It commences with a short lecture and video on the facility and animals, then proceeds to take visitors on a journey through the sanctuary providing an opportunity to see threatened species such as the bilby, woylie, mala, quenda and boodie. Feeding stations are placed along the walking trail with seating for small groups of visitors. Visitors are encouraged to identify the types of animals that come to the feeding points however interaction with the animals is not encouraged.

The facility houses two (2) enclosures each of approximately 10 hectares. The enclosures not only protect the housed animals but also allow for the maintenance of the vegetation and eco-system in the enclosures and protect the animals from external threats such as predators. The first enclosure was built in 2002 at a cost of approximately \$170,000, with \$100,00 cost for the building and \$70,000 cost for the fencing. Due to the increase in animal population through their breeding program, a second enclosure was required and built in 2016 at a cost of \$100,000 which was predominantly for fencing only. It is estimated that the cost in 2021 would be approximately \$250,000 for the same facility, administration building and two (2) enclosures, to be built in a regional location.

Visitation to the site has increased steadily since opening in 2002. The impact of COVID-19 resulted in a decline in international visitation, however the numbers of domestic visitors has increased resulting in visitation at almost pre-COVID level (Table 16).

**Table 16. Visitation to Barna Mia Nocturnal Wildlife Experience, 2015/2016 to 2020/2021.**



Source: Department of Biodiversity, Conservation and Attractions, Wheatbelt Region

A number of challenges have been expressed by various key stakeholders in relation to maintaining the animal sanctuary:

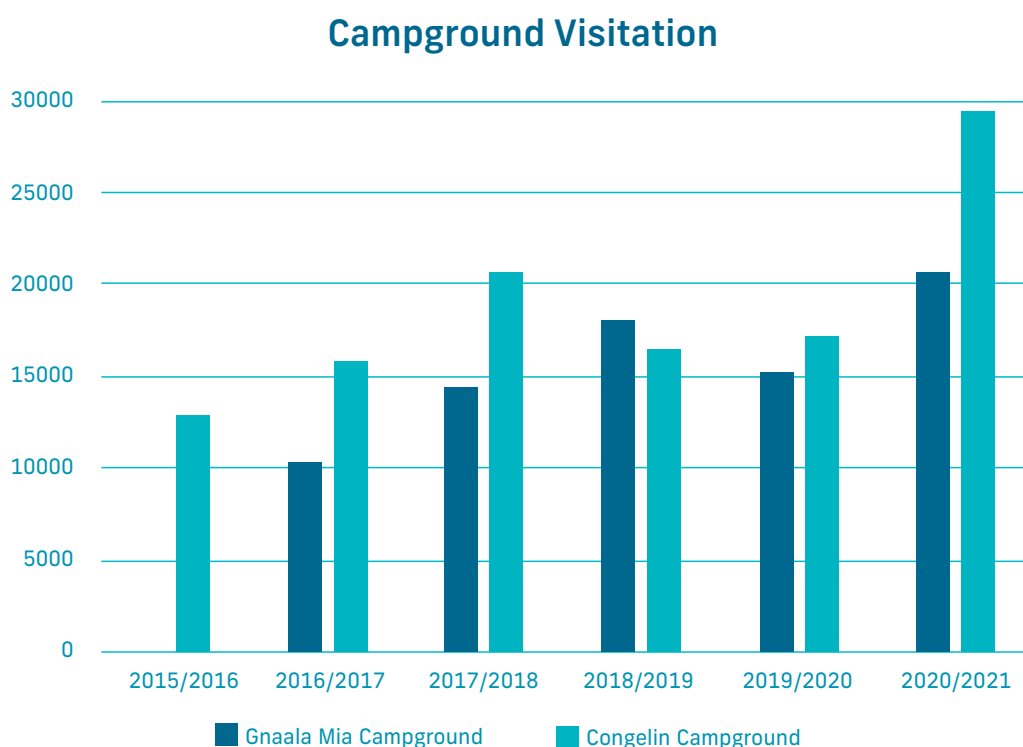
- Profitability – despite the numbers reaching capacity on many occasions, it has been stated that it is not a viable commercial business as there is no profit achieved:
  - Wages of guides is the largest operational expense,
  - The revenue only just meets the expense of the business.
- Cost of the breeding program – this educational experience does carry a significant cost to the facility. Mawson (2004) details the cost associated with producing animals in captive breeding facilities for translocation programs for Project Eden, Return to Dryandra and Gilbert's potoroo. 'Cost per animal' of production for animals bred at the Barna Mia ranges from \$1,660 per animal produced to a deficit of \$71,400 indicating an unsuccessful breeding program.
- Sourcing of animal population genetics to maintain genetic stock to avoid interbreeding,
- Veterinary care for the animal population including health management,
- Isolation of the facility and lack of accommodation options for visitors.
- The concept of a nocturnal wildlife experience presents the challenge of determining its function – wildlife management versus captive animal management versus educational exhibit versus entertainment. Captive wildlife tourism attractions such as Barna Mia allow visitors to view rare animals not commonly seen in the wild and also attracts a wider audience as the experiences are usually less expensive (Hughes, et al, 2005a). However a captive wildlife facility can be viewed as contra indicative to tourism.

A visitor perceptions survey was conducted in the first year of operation of Barna Mia to gain an understanding of the success of the facility as a captive wildlife tourism experience. Respondents ranked their satisfaction very high with the most frequently cited reason for the satisfaction ranking given related to the strong educational emphasis of the experience. There was also a perception that the experience was further enhanced by the small enclosure which provided the experience in a wild or non-captive context (Hughes et al, 2005b).

Adjacent to Barna Mia in the Dryandra Woodland are two (2) campgrounds – Gnaala Mia Campground and Congelin Campground. Many of the visitors staying in the campgrounds are for the purpose of experiencing the nocturnal wildlife encounter at Barna Mia. The trajectory of visitation to the campgrounds aligns with the visitation to Barna Mia Nocturnal Wildlife Experience (Table 17).

Despite the potential challenges inherent in developing and maintaining an animal encounter experience at FPHP, there appears to be considerable support from key stakeholders to proceed with the Project. The animal encounter would likely be an opportunity for increased visitation to the Precinct, as observed in similar projects (Collett and Tischler, 1998). In alignment with Barna Mia, the animal encounter at FPHP would adhere to appropriate social and environment impact thresholds. However, the cost and workforce needed to develop the breeding program, in addition to sourcing the animals, will require support and the provision of facilities from DBCA. It is predicted that any potential animal encounter or such project would breakeven – as was evident at Barna Mia – which is a highly positive outcome. Accordingly, there is potential for improved outcomes for Francois Peron Heritage Precinct with the inclusion of a wildlife encounter project.

Table 17. Visitation to Campgrounds in the Dryandra Woodland, 2015/2016 to 2020/2021.



Source: Department of Biodiversity, Conservation and Attractions, Wheatbelt Region

## Business Opportunity

The various uses proposed in the Masterplan Concept incorporate a range of opportunities for local and indigenous businesses providing business expansion/growth and new business development. Each stage presents additional activities or infrastructure which is required for ongoing sustainability of the FPHP. This can be achieved through increase in visitation and economic viability (based on feasible business processes) allowing the demand to drive the development of each stage. Table 18 outlines the stages of the Masterplan, the category of business, proposed activity, and the opportunity for local business.

Table 18. Business Opportunity from the Masterplan Concept.

Stage	Category	Proposed	Opportunity for Local Businesses
1	Accommodation	Campsites - approx. 40	Cleaning, maintenance
1	Facilities	Site Hub - kitchen, ablutions x 2, administration facility	Cleaning, café, administration
1	Tourism	Interpretation - Indigenous & pastoral history, storytelling, signage.	Indigenous culture, tour guide
1	Food	Snack food items sold at reception/administration.	Local bakery, produce, beverage vendor
1	Facilities	Administration/reception	Hospitality management



1	Tourism	Hot tubs - Multiple onsite - 6, refurbishment of existing tub,	Cleaning, maintenance
1	Tourism	Astrotourism from FPHP	Indigenous culture
2	Accommodation	Glamping - approx. 20	Cleaning, maintenance
2	Accommodation	Repurposed Shearing Quarters for group accommodation.	Cleaning, maintenance
2	Facilities	Expansion to fully functional kitchen, expansion of bathroom facilities.	Cleaning, maintenance
2	Facilities	Function venue for weddings, birthday celebrations, events	Event management, cleaning, catering
2	Facilities	Development/refurbishment of manager's quarters.	Building, maintenance, cleaning
2	Facilities	Café	F&B, caterer
2	Food	Development of restaurant/café - commercial enterprise	F&B, caterer, restaurant
2	Tourism	Cultural centre	Indigenous culture, cleaning
3	Accommodation	Self-contained chalets - approx. 6	Hospitality management, cleaning, maintenance
3	Tourism	Personal hot springs	Cleaning, maintenance
3	Tourism	Group bus tours at night to astro tourism events	Bus charter company

To support the development of businesses in the FPHP, a number of supporting agencies are available to offer business set-up and ongoing training:

- Small Business Development Commission – provides free advice and low-cost services to small business owners in Western Australia, through business information, advisory services and templates, tools, and guides to assist with business needs. Practical workshops also cover a range of business topics providing a hands-on approach,
- Tourism Council WA – provides a range of events and workshops to support business specifically in tourism; includes the Quality Tourism Accredited Business Framework combining multiple tourism accreditation, business development and awards programs, online tools to develop and grow tourism businesses; conducts an annual tourism conference incorporating key guest speakers from the tourism industry,
- Aboriginal companies such as Six Seasons Connect (Source: [www.sixseasonconnect.com](http://www.sixseasonconnect.com)) who provide economic development and opportunities for Aboriginal and Torres Strait Islander people seeking business and enterprise pathways, offering services to Indigenous people looking to build a business from pre-start to start-up.

Collaboration with other stakeholders such as other hot tub experiences has the potential to develop a hot tub trail, or hot tub package throughout the state.

## Francois Peron Heritage Precinct Masterplan Concept – Estimated Construction Costs

The construction cost estimates outlined in Table 19 are based on estimates provided by contractors in the region, published secondary data, stakeholders from similar facilities in the region, and from a multidisciplinary property development consulting business with extensive experience on developments of a similar nature and scale. More detailed construction costs can be found in Appendix 5.

*Table 19. Francois Peron Heritage Precinct Masterplan Concept – Estimated Construction Costs Summary.*

Francois Peron Heritage Precinct Masterplan Concept – Estimated Construction Costs Summary					
	Stage 1/Year 1		Stage 2/ Year 2	Stage 3/ Year 3	Total
	Government	Private			
Preliminaries & Headworks		\$200,000	\$50,000	\$50,000	\$300,000
Forward Works		\$30,000	\$10,000	\$10,000	\$50,000
Infrastructure, Civil & Services	\$2,500,000				\$2,500,000
Accommodation Buildings		\$3,100,000	\$2,655,000	\$2,200,000	\$7,955,000
Landscaping		\$1,447,000	\$60,000		\$1,507,000
ICT		\$20,000			\$20,000
Fixtures, Furniture & Equipment		\$739,000			\$739,000
Plant & Equipment		\$360,000			\$360,000
Consultants		\$1,007,520	\$333,000	\$271,200	1,611,720
Roadway	\$5,000,000				\$5,000,000
Bore		\$600,000			\$600,000
Contingency		\$1,410,528	\$466,200	\$379,680	\$2,256,408
<b>Total Project Costs</b>	<b>\$7,500,000</b>	<b>\$8,914,048</b>	<b>\$3,574,200</b>	<b>\$2,910,880</b>	<b>\$22,899,128</b>

The estimated cumulative capital cost – Stages 1 to 3 – to develop FPHP on the proposed site as per the Masterplan Concept is \$22,899,128 which includes a construction contingency cost of 15% (\$2,256,408) and a consultant cost of 12% (\$1,611,720). The contingency cost of 15% is conservative given the current rate of cost escalation of build materials. The estimated capital cost for Stage 1 has been separated into Government and Private contributions, with \$7.5M allocated to Government contribution including the development capital costs of infrastructure, civil & services, and the roadway. The contribution from Private investors totals \$8.914M.

Stage 2 requirements include an estimated capital cost of \$3,574,200 and Stage 3 an estimated capital cost of \$2,910,880.

The Roadway cost included in the construction estimate in Table 19 is based on a new proposed sealed access road from Denham-Monkey Mia Road to the Heritage Precinct, at a length of 7km and a cost of \$714 per metre and based on current development costs in 2021/2022. Three (3) options were considered in the development of the site based on differing road base material: shell grit, graded and sealed. In determining the most appropriate for future development, two (2) factors were considered: visitation and accessibility. An increase in traffic to the Precinct has been projected based on the proposed Masterplan, from 25 per day in 2020/2021 to a proposed visitor number of 374 for Stage 3 of the Project. Sealing the road will also provide access for 2-wheel drives which currently do not have access to the FPHP or FPNP. The proposed cost of \$5 million is higher than that proposed in the Greenfield Technical Services 'Road Upgrade Review Report' (2017) which estimates the cost of the road at \$3.1 million however the current proposed cost is based on road development costs in 2021/2022. Analysis of the sand material and completion of a road design along the new proposed sealed road has not been included in the scope of this Project and is recommended to be completed in the next stage of the Project.

A key consideration in the construction estimate is the lack of access to mains power, scheme water supply or sewerage to the site, all of which are essential components in the development of the accommodation and tourist activities in the Masterplan Concept. A construction estimate of \$2.5 million has been included in Stage 1 to meet the requirements of infrastructure, civil and services requirements to the site. Water supplies to the FPNP are accessed via the Carnarvon Artesian Basin (CAB) and the Birdrong aquifer. The DBCA currently manages two (2) artesian bores within the FPNP which access water from the Birdrong aquifer. The Peron Homestead artesian bore currently supplies water to the Precinct at a flow rate of approximately 1.5L / sec to a yield of approximately 47ML per annum being close to full capacity (Endemic, 2011). A cost provision of \$600,000 has been allocated for the bore which will provide either a new bore in its existing location or an additional bore with the potential to yield up to 60L / sec. The artesian nature of the aquifer has the potential to meet the demand of the increase in hot springs and water heating requirements of the accommodation due to the onsite heat production of the artesian bore. Further analysis of the life of the current bore and bore requirements to meet the future demand and capacity would be required in the next stage of the Project.

## Francois Peron Heritage Precinct Masterplan Concept – Estimated Revenue

Table 20 outlines the Revenue/Income Estimates for the Masterplan Concept for each of the Stages 1 to 3. It has been developed following consultation with DBCA, comparing projects of similar nature and scale, stakeholders from similar facilities in the region, and from a multidisciplinary property development consulting business with extensive experience on developments of a similar nature and scale. More detailed construction costs can be found in Appendix 6.

Table 20. Francois Peron Heritage Precinct Masterplan Concept – Estimated Revenue Summary.

Francois Peron Heritage Precinct Masterplan Concept – Estimated Revenue Summary				
	Stage 1/Year 1	Stage 2/Year 2	Stage 3/Year 3	Total
<b>Visitation</b>	111,066	132,780	136,585	380,432
<b>Revenue</b>	\$3,349,742	\$6,023,658	\$6,830,485	\$16,203,885
<b>DBCA Access Fee</b>	-\$756,615	-\$813,361	-\$816,239	-\$2,386,214
<b>COGS</b>	\$913,958	\$1,529,934	\$1,619,176	\$4,063,068
<b>Labour</b>	\$459,128	\$1,319,081	\$1,559,402	\$3,337,611
<b>Undistributed Operating Expenses</b>	\$752,007	\$1,510,986	\$1,744,131	\$4,007,125
<b>Gross Operating Profit</b>	<b>\$486,034</b>	<b>\$850,297</b>	<b>\$1,091,537</b>	<b>\$2,409,867</b>
<b>Fixed Charges</b>	-\$64,828	-\$720,039	-\$881,038	-\$405,584
<b>Net Operating Income</b>	<b>\$403,206</b>	<b>\$720,039</b>	<b>\$881,038</b>	<b>\$2,004,283</b>

Visitation to FPNP and FPHP for 2021 is estimated at approximately 245 per day or almost 90,000 for the year. With the introduction of a variety of visitor facilities and amenities, including accommodation options, additional hot tubs, ablution facilities, nature experiences including star gazing and ranger guided walks, picnic and BBQ area, seating and rest areas, food and beverage outlet and an upgraded interpretive centre, it is projected that visitation will increase from 111,066 in Stage 1, to 132,780 in Stage 2 and 136,585 in Stage 3. These projected visitation numbers are within the limits of the physical carrying capacity for the Precinct as outlined earlier in this section.

A DBCA Access Fee has been allocated at \$10 per car for Precinct Access and Park Access and deducted from each of the Stages. However, as visitors to Monkey Mia Conservation Park pay an entrance fee of between \$5 and \$60 depending on number of visitors and length of visit (Source: <https://parks.dpaw.wa.gov.au/know/park-entry-fees>), a one-off fee should be considered which would incorporate visitation to Dirk Hartog Island, Monkey Mia, FPHP and FPNP. It is recommended this concept be further explored in the next stage of the Project.

Based on the estimated visitation, estimated total revenue for Stage 1 is \$3,349,742, Stage 2 increases to \$6,023,658 and Stage 3 is \$6,830,485. An allocated spend per car, accommodation room or experience has been allocated to determine viability and sustainability. Cost of Goods Sold (COGS) has been calculated as a percentage of revenue: 65% for merchandise, 50% for refreshments, and 40% for restaurant and café. Labour Costs have been calculated at 25% for Stage 1 and 30% for each of Stages 2 and 3. Undistributed costs have been included for Administration and General Expenses, Sales and Marketing, Property Operations and Maintenance and Utilities with a total of 29% for undistributed expenses. This results in a Gross Operating Profit of \$486,034 or 18% for Stage 1, \$850,297 or 16% for Stage 2 and \$1,091,537 or 18% for Stage 3. Further deductions of Fixed Charges including lease rent, rates and taxes, insurance, and other expenses for each stage results in a Net Return of \$403,206 or 16% for Stage 1, \$720,037 or 14% for Stage 2, and \$881,038 for Stage 3. Provision for a reserve allocation or sinking fund, operator fees or depreciation has not been included at this preliminary stage of feasibility.

A financial summary is provided in Table 21:

*Table 21. Francois Peron Heritage Precinct Masterplan Concept Financial Summary.*

Financial Summary				
	Stage 1/Year 1	Stage 2/Year 2	Stage 3/Year 3	Total
<b>Project/Capital Cost</b>	\$8,914,048	\$3,574,200	\$2,910,880	\$15,399,128
<b>Percentage Profit on Construction Costs - Cumulative</b>	4.9%	6.1%	6.0%	
<b>Visitor Numbers</b>	111,066	132,780	136,585	
<b>Operating Revenue</b>	\$3,349,742	\$6,023,658	\$6,830,485	\$16,203,885
<b>Operating Costs</b>	\$2,881,708	\$5,173,362	\$5,738,949	\$13,794,018
<b>Operating Surplus</b>	\$468,034	\$850,297	\$1,091,537	\$2,409,867
<b>Percentage GOP</b>	18%	16%	18%	
<b>Net Return (after fixed charges)</b>	16%	14%	15%	
<b>Return on Investment</b>	-94.75%	-76.21%	-62.50%	-84.35%
<b>Return on Total Assets</b>	5.25%	23.79%	37.5%	
<b>Return on Equity<sup>2</sup></b>	5.25%	23.79%	37.5%	15.65%
<b>Debt to Equity</b>	25%	25%	25%	

<sup>1</sup> Calculated on Private Investment Costs Only.

<sup>2</sup> Return on Equity calculated with 75% owners' funds.



## Investor Interest

Over the timeframe of the Project, awareness has been generated in a management opportunity of a National Park in Western Australia. There are a number of potential management options:

- DBCA as the sole management department,
- Managed by MAC,
- Joint Venture between DBCA and MAC,
- Lease arrangement to a private investor(s),
- Lease arrangement to a private investor who provides opportunity to Indigenous content to be applied by way of a MOU.

It would be recommended that any business established to support services to visitors to FPHP through funding would ultimately become a social enterprise and self-funded.

Since the inception of this Project, two private companies have expressed a verbal interest in further information when it becomes available. Both companies have extensive business interests in Western Australia, are hospitality and tourism focused, manage caravan parks and camping grounds with multifaceted facilities, have completed developments of a similar size and nature, and familiar with developments in regional locations such as Shark Bay and the FPHP. It is in the opinion of the consultants that either business would be a good fit for the location and would support local content and encourage business growth.

## Economic, Environmental, and Social Perspectives Impacts and Opportunities

An analysis of the political, economic, social, technological, environmental, and legal (PESTEL) factors has been completed outlining the issues, business impacts and opportunities for each of Political, Economic, Sociocultural, Technological, Environmental, and Legal aspects of the Project Concept and are outlined in Table 22.

Table 22. PESTEL Analysis of the Macro-environment.

ISSUE	P POLITICAL	E ECONOMIC	S SOCIOCULTURAL	T TECHNOLOGICAL	E ENVIRONMENTAL	L LEGAL
	<ul style="list-style-type: none"> <li>Opening of state borders may decrease tourism visitation.</li> <li>Potential lack of support from Shire of Shark Bay.</li> <li>State and federal strategies change with change of governments affecting funding.</li> </ul>	<ul style="list-style-type: none"> <li>Decrease in funding</li> <li>Limited aboriginal businesses.</li> <li>Current entrance fees payable for Monkey Mia and FPHP separately- not one fee</li> <li>Inconsistency in service and product in service providers.</li> </ul>	<ul style="list-style-type: none"> <li>MAC difficult to engage</li> <li>Locals don't want to lose sight of the 'old Shark Bay' with any new project.</li> <li>Limited social presence of any local businesses.</li> </ul>	<ul style="list-style-type: none"> <li>Distance from Denham and Monkey Mia may impact technology requirements</li> <li>Marketing site as a 'device free area' may impact on visitation.</li> <li>Negative online reviews will see visitors bypass Shark Bay/Monkey Mia.</li> </ul>	<ul style="list-style-type: none"> <li>Increase in visitation may have a lasting environmental impact on FPHP.</li> <li>World Heritage Convention may limit ideas and funding.</li> <li>Challenge of development of a nocturnal experience</li> <li>Monkey Mia's limited lifecycle.</li> </ul>	<ul style="list-style-type: none"> <li>No Development Application Approval phase for FPHP.</li> <li>No land tenure in FPHP.</li> </ul>
	<ul style="list-style-type: none"> <li>Current visitation is intrastate market. Borders opening could result in international tourism.</li> <li>Barriers for any development at FPHO.</li> <li>Decrease in funding affecting future plans</li> </ul>	<ul style="list-style-type: none"> <li>Limited opportunity and funding for Project feasibility and development.</li> <li>Visitors not willing to pay 2 fees and not entering FPHP and FPNP.</li> <li>Negative reviews on Trip Advisor &gt; loss of business</li> </ul>	<ul style="list-style-type: none"> <li>MAC not engaged in the preliminary stage of the project &gt; lack of interest or engagement in future stages.</li> <li>Low or no local marketing of FPHP.</li> <li>Visitors not aware of the great offerings in Shark Bay</li> </ul>	<ul style="list-style-type: none"> <li>Installing technology would be cost prohibitive</li> <li>Loss of visitation due to tourists not having ability to connect devices.</li> <li>Loss of business and include to loss visitors.</li> </ul>	<ul style="list-style-type: none"> <li>Potential to exceed carrying capacity causing damage to the environment and closure of site to visitors.</li> <li>Loss of native flora and fauna</li> <li>Alternative experience would need to be considered replacing Monkey Mia.</li> </ul>	<ul style="list-style-type: none"> <li>Delay in approvals due to land tenure and challenge of support from Shire and other regulatory bodies</li> </ul>
	<ul style="list-style-type: none"> <li>Potential increase in interstate market.</li> <li>Engagement with Shire on an ongoing basis in a collaborative approach with economic and social outcomes for the Shire.</li> </ul>	<ul style="list-style-type: none"> <li>Source for private investment to assist in the next stages of the development</li> <li>Introduction of a reduced fee for visitors to both areas.</li> </ul>	<ul style="list-style-type: none"> <li>Develop a Project Committee including MAC to stay informed on progress.</li> <li>Increase marketing including hot tubs for visitation and Shark Bay in general</li> </ul>	<ul style="list-style-type: none"> <li>Seek investment in regional technology to support other developments.</li> <li>Seek opportunities for local satellites</li> </ul>	<ul style="list-style-type: none"> <li>Minimise tourist numbers and retain its inherent characteristics</li> <li>Replanting of local flora and fauna through voluntourism.</li> <li>Dark sky/astrotourism, health and wellness</li> </ul>	<ul style="list-style-type: none"> <li>Remaining within the planning guidelines to achieve a positive and timely outcome on development to increase private investment.</li> </ul>
BUSINESS IMPACT						
OPPORTUNITY						

## KEY FINDINGS

- As Francois Peron National Park being is an 'Class A' reserve and gazetted as a national park, care and consideration has been given to providing a concept that remains authentic to objects of the 'Shark Bay Terrestrial Reserves and Proposed Reserves Additions, Management Plan No 75 2012' (Department of Environment and Conservation, 2012) in three (3) key areas: management objectives, visitor management settings, and tourism and commercial operations.
- A Physical Carrying Capacity construct has been applied to the Masterplan Concept providing PCC totals for each of the stages. Estimated visitation for the Project has been designed to remain within the limits of the PCC.
- To alleviate FPHP visitor and FPNP commuter pressure on the current road, which is currently unsealed, an additional entry point and road is proposed which is currently used as a DBCA only accessway with an estimated cost of \$5M.
- The accommodation density has been calculated based on the appropriate planning regulations including the 'Caravan Parks and Camping Grounds Regulations 1997' (Government of Western Australia, 2020 b) which states there is to be at least 3m between camping sites on a facility and any building on the facility that is not a site, and the camp of any person who is not a member of a group, and the Building code of Australia standards.
- The current location of the hot tub would be enhanced through an increase in number of hot tubs as well as aesthetic appeal, and development of a small amphitheatre style area for night sky and cultural tours in the current scrub area.
- Interpretation around site would be upgraded and enhanced through methods such as audio, integration into shelters and pathways and sculptural elements.
- Trails would be enhanced through clear and concise wayfinding signage around site with buildings clearly identified through consistent naming and style.
- The Interpretation Centre would be redesigned to incorporate modern storytelling of Malgana cultural heritage, flora and fauna, constellation/night sky, pastoral station history, and the 'Return to 1616' project and Dirk Hartog Island.
- The Shearers Shed would be renovated and interpretation enhanced, and development of a visitation control point introduced to incorporate a hub, administration, interpretive centre, and snack bar/restaurant.
- Accommodation would be provided through:
  - Forty (40) campsites in Stage 1,
  - Twenty (20) glamping sites in Stage 2,
  - Group accommodation in the Shearing Quarters to sleep between sixty (60) and eighty (80) in Stage 2,
  - Six (6) self-contained chalets in Stage 3.
- The animal encounter would likely be an opportunity for increased visitation to the Precinct, as observed in similar projects (Collett and Tischler, 1998). In alignment with Barna Mia, the animal encounter at FPHP would adhere to appropriate social and environment impact thresholds. However, the cost and workforce needed to develop the breeding program, in addition to sourcing the animals, will require support and the provision of facilities from DBCA.

## Section 9. Recommendations and Where To From Here

The outcome of the Project is a list of recommendations to progress the Masterplan Concept:

- Seek funding to support a full feasibility study to refine costing and design,
- Analysis of the sand material and completion of a road design to further refine cost ie. determine whether shell grit, graded or sealed,
- Hydrology testing to determine the pressure of water from the artesian hot spring to support future development at FPHP,
- Geotechnical survey to determine soil consistency and structure, as well as ground water levels for the project site,
- Structural engineer survey on current infrastructure at FPHP,
- Quantity survey feasibility study on full construction,
- Explore a single access fee for Francois Peron National Park including Monkey Mia, Dirt Hartog Island and FPNP,
- Continue to engage with the Malgana Aboriginal Corporation to ensure they remain a key stakeholder in any future development at FPHP,
- Seek expressions of interest from potential developers and investors who can support the development from the initial stages.



## Section 10. Conclusion

The outcome of this study indicates the proposed Project has the potential to become an iconic tourist destination offering a range of experiences, accommodation, and tourist amenities, many which are new entrants to the offerings in the region. The FPHP and broader Shire of Shark Bay has the potential to gain economic, social, and cultural benefit through the increase in visitation numbers supporting local business.

Stakeholder engagement through one-on-one interviews and a workshop was instrumental in developing some of the key constructs of the Masterplan Concept. Themes emerged in the feedback which enabled the development of some of the key features and provided an opportunity for community ownership. This represents a community participation model which leads to community ownership and a greater support mechanism and development champions.

Visitation to FPHP would increase from 111,066 in Stage 1 to 136,585 in Stage 3 well below the estimated physical carrying capacity of the Project Site. The estimated development cost totals \$22,899,128 with a breakdown for each of the three stages of \$16,814,048 for Stage 1, \$3,574,200 for Stage 2 and \$2,910,880 for Stage 3. Gross Operating Profit for Stage 1 is estimated at \$468,034, Stage 2 at \$850,296 and Stage 3 at \$1,091,536.

With appropriate support from government agencies, FPHP has the potential to enhance the World Heritage area by introducing a range of experiences that complement the natural environment. It has been the intention of this study and subsequent report to provide development which supports the objectives of World Heritage and Aboriginal cultural and heritage values and resists an overtourism approach on a Class A Reserve.

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## Appendix 1. Stakeholder List

Contact	Position	Company
Steve Nicholson	District Manager, Shark Bay District, Parks and Wildlife Service	Department of Biodiversity, Conservation and Attractions
Sue Hancock	Regional Leader Parks and Visitor Services, Parks and Wildlife Service	Department of Biodiversity, Conservation and Attractions
Paul Anderson	Chief Executive Officer	Shire of Shark Bay
Debbie Wilkes	Executive Manager Community Development	Shire of Shark Bay
Candice Uszko	Centre Coordinator	Shark Bay World Heritage Discovery & Visitor Centre
Cheryl Cowell	President	Shire of Shark Bay
Mira Vankova	Chairperson	Shark Bay Tourism Association
Simmone Van Buerle	Director of Regional Development	Gascoyne Development Commission
Rebecca Stanley	Executive Manager, Community Development	Shark Bay Coastal Tours
Carol Redford	Founder/CEO	Astrotourism WA
David O'Malley	Chief Executive Officer	Australia's Coral Coast
Nigel Wessels	Regional Manager, Goldfields Region, Parks and Wildlife Service	Department of Biodiversity, Conservation and Attractions
Wendy Attenborough	Executive Director	Perth Zoo
Darren Capewell	Director	Wula Gura Nyinda Eco Adventures
Harry Oakley	Chairperson	Malgana Aboriginal Corporation
Gavan Mullen	Senior Operations Officer – Parks and Visitor Services, Parks and Wildlife Service	Department of Biodiversity, Conservation and Attractions
Karen Cullen	Executive Director	WA Gould League
Patricia Edwards	Heritage Agent	Badimia Land Aboriginal Corporation
Steve Crawford	Manager, Visitor Communications and Marketing	Department of Biodiversity, Conservation and Attractions
Matt King	Commercial Business Coordinator, Parks and Wildlife Service	Department of Biodiversity, Conservation and Attractions
James Hewitt	Chief Operations Officer	Australian Wildlife Conservancy
Greg Ridgley	Owner/Operator	Monkey Mia Cruises
Martin Grenside	General Manager	RAC Monkey Mia Dolphin Resort
Robert Taylor	Chief Executive Officer	WAITOC
Mitchell Davies	Regional Operations Manager, Parks and Wildlife Service	Department of Biodiversity, Conservation and Attractions
Tom Donaldson	Principal of DDM	Donaldson Development Management
Katherine Gunn	Director	PGA Management



## Appendix 2. Contact with MAC and YMAC

Date	Contact	Comment
15 June 2021	Harry Oakley	Sent out the project workshop flyer.
7 July 2021	Sean McNeair	Contact with Sean regarding potential discussion on the project. Sean responded advising that we were unable to assist as he does not represent MAC however cc'd Jose Kalpers, Harry Oakley, and Gina Cross, to respond.
7 July 2021	Rani Randall & Thomas Wear	Introduction by Simmone Van Buerle, Gascoyne Development Commission.
8 July 2021	Rani Randall & Thomas Wear	Request to Rani and Thomas for their availability to meet and discuss via Zoom. No response.
9 July 2021	Harry Oakley & Gina Cross	Email requesting opportunity to discuss the project, requesting suitable days/times. No response.
20 July 2021	Harry Oakley	"Mark Adams telephone contact with Harry Oakley discussing the project and potential to meet up. Harry suggested he was happy to meet up and discuss plans. Suggested to send an email for meeting also to present at the next MAC Board Meeting, 2 months from 22 July.
Mark followed up with an email. No response."		
29 July 2021	Harry Oakley	Follow up and potential to meet up 3 August 2021. No response.
1 September 2021	Robert Taylor	Meeting with Robert Taylor from WAITOC to discuss best opportunity to contact MAC. Robert suggested going in to the YMAC/MAC office in Perth.
14 September 2021	MAC Office, Perth	Attended to MAC office in Perth – could not access.
21 September 2021	Harry Oakley	Kim Hewson telephone contact to Harry Oakley. No response.

## Appendix 3. Community Workshop Flyer

# Francois Peron Heritage Precinct

## Tourism Business Opportunity Analysis



Join us for an informal, interactive workshop to discuss tourism opportunity in the Francois Peron Heritage Precinct.

Kim Hewson, Principal of Economic Transitions, and Mark Adams, Managing Director of Executive Compass will be leading an informal discussion and would like your input.



This is your chance to share your opinions on current and potential tourism for the Francois Peron Heritage Precinct.

Places are limited but free and include snacks and refreshments.

### Details:

Workshop will be held on:

**Thursday, 17 June 2021**  
6pm – 7.30pm

Workshop will take place at:

**Shark Bay Recreation Centre**  
**Meeting Room**  
**30 Francis Street, Denham**

To register, email Kate Anderson at [info@economictransitions.com.au](mailto:info@economictransitions.com.au)

For more information, please contact

Kim Hewson on **0412 884 427** or Mark Adams on **0412 397 909**



#### Appendix 4. Business Offerings in the Shire of Shark Bay

Business Name	Location	Business Type
Bay Lodge	Denham	Accommodation
Blue Dolphin Caravan Park	Denham	Accommodation
Blue Lagoon Pearls	Denham	Retail
Boughshed Restaurant	Monkey Mia	Food
Cellarbrations	Denham	Retail
Denham IGA X-Press	Denham	Retail
Denham Meats	Denham	Retail
Denham Seaside Caravan Park	Denham	Accommodation
Hamelin Pool Caravan Park	Hamelin Pool	Accommodation
Hamelin Pool Station	Hamelin Pool	Accommodation
Heritage Pearls	Denham	Retail
Heritage Resort Shark Bay	Denham	Accommodation
Monkey Mia Boat Hire	Monkey Mia	Boat Hire
Monkey Mia Wildsights	Monkey Mia	Tourism
Nanga Bay Resort & Caravan Park	Nanga	Accommodation
Naturetime Tours	Denham	Tourism
Ocean Park Aquarium	Denham	Tourism
Oceanside Village	Denham	Accommodation
Old Pearler Restaurant	Denham	Food
Perfect Nature Cruises	Monkey Mia	Tourism
RAC Monkey Mia Dolphin Resort	Monkey Mia	Accommodation
Shark Bay Aviation	Denham	Aviation
Shark Bay B&B	Denham	Accommodation
Shark Bay Bakery	Denham	Food
Shark Bay Boat Hire	Denham	Boat Hire
Shark Bay Café	Denham	Food
Shark Bay Car Hire	Denham	Car Hire

Shark Bay Caravan Park	Denham	Accommodation
Shark Bay Coaches	Denham	Transportation
Shark Bay Coastal Tours	Denham	Tourism
Shark Bay Discovery Centre	Denham	Tourism
Shark Bay Fish Factory	Denham	Retail
Shark Bay Holiday Cottages	Denham	Accommodation
Shark Bay Hotel	Denham	Accommodation
Shark Bay Kitesurfing	Denham	Tourism
Shark Bay News & Gifts	Denham	Retail
Shark Bay Pizza	Denham	Food
Shark Bay Quad Bikes	Denham	Tourism
Shark Bay Seafront Apartments	Denham	Accommodation
Shark Bay Supermarket	Denham	Retail
Surf N Dolphin	Denham	Retail
Wildsights Villas	Denham	Accommodation
Wula Gura Nyinda Eco Adventures	Denham	Tourism
Yadgalah Mini Golf	Denham	Sports & Recreation

## Appendix 5. Francois Peron Heritage Precinct Masterplan Concept – Estimated Construction Costs

CONSTRUCTION ESTIMATE				Stage 1/Yr 1	Stage 2/Yr 2	Stage 3/Yr 3
<b>Preliminaries &amp; Headworks</b>						
Insurances						
Security/Bank Guarentees						
Statutory Fees - DA						
Fees/Levies/BCITF						
Survey						
Accommodation Costs						
Flights						
Head Works - Water						
Head works - Sewer						
Mobilisationb/Demobilisation						
Site Setup						
PM and Facilities						
WHS						
<b>Sub Total</b>				<b>\$ 200,000</b>	<b>\$ 50,000</b>	<b>\$ 50,000</b>
<b>Forward Works</b>						
Asbestos Demolition/Removal						
Remove Trees and stumps						
Fencing - Temporary						
Demolition and Removal						
Demolition services PS						
Clearing						
Waste						
Site Clean up						
<b>Sub Total</b>				<b>\$ 30,000</b>	<b>\$ 10,000</b>	<b>\$ 10,000</b>
<b>Infrastructure, Civil &amp; Services</b>						
Common Infrastructure External Services provision - stormwater, Sewer, water, gas, electrical, communications,				\$ 1,500,000		
Civil & Services distribution				\$ 1,000,000		
<b>Sub Total</b>				<b>\$ 2,500,000</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Buildings</b>						
Common Buildings						
Central Hub (Admin, VC, Café+)	\$ 600	\$ 2,800		\$ 1,680,000		
Maintenance Shed	\$ 300	\$ 750		\$ 225,000		
Camp Kitchen	\$ 1	\$ 250,000		\$ 250,000	\$ 250,000	
Ablutions	\$ 3	\$ 200,000		\$ 400,000	\$ 200,000	
Managers Quarters 4 x 2	\$ 1	\$ 350,000		\$ 350,000		
Staff Quarters	\$ 12	\$ 16,250		\$ 195,000		
<b>Sub Total</b>				<b>\$ 3,100,000</b>	<b>\$ 450,000</b>	<b>\$ -</b>
<b>Accommodation Buildings</b>						
Shearers Dormitories 18mx 13m	\$ 250	\$ 2,000			\$ 500,000	
Sherers Quarters Ensuits	\$ 6	\$ 30,000			\$ 180,000	
Shearers Quarters Kitchen 10m x 10m	\$ 100	\$ 1,250			\$ 125,000	
Glamping Sites	\$ 20	\$ 70,000			\$ 1,400,000	
Disabled Site(s)						
Self Contained Chalets 3x2	\$ 10	\$ 220,000				\$ 2,200,000
<b>Sub Total</b>				<b>\$ -</b>	<b>\$ 2,205,000</b>	<b>\$ 2,200,000</b>
<b>Landscaping</b>						
Entry Statement main road				\$ 50,000		
Hardscpaing				\$ 100,000		
Carpark	\$ 80	\$ 1,000		\$ 80,000		
Car Bays x 120	\$ 120	\$ 1,000		\$ 60,000	\$ 60,000	
Paved public areas pathways	\$ 500	\$ 120		\$ 60,000		
Fencing @ Entrance & Gateworks @ \$250	\$ 100	\$ 250		\$ 25,000		
External & Safety Lighting - provision				\$ 25,000		
Landscape Furniture, Bins, Bollards etc - provision				\$ 50,000		
Soft Scaping				\$ 75,000		



## Appendix 5. Francois Peron Heritage Precinct Masterplan Concept – Estimated Construction Costs (cont.)

Signage, wayfinding allowance				\$ 80,000		
Hot Tub Large	\$ 1	\$ 50,000		\$ 50,000		
Hot Tub Small	\$ 6	\$ 30,000		\$ 180,000		
BBQ's, Installation, Paving, delivery, Electrical	\$ 2	\$ 15,000		\$ 30,000		
Shelters	\$ 2	\$ 15,000		\$ 30,000		
Retic	\$ 1	\$ 20,000		\$ 20,000		
Animal Enclosure Infrastructure & buildings	\$ 2	\$ 50,000		\$ 100,000		
Animal Enclosure 4 hectare fencing	\$ 1,600	\$ 270		\$ 432,000		
<b>Sub Total</b>				<b>\$ 1,447,000</b>	<b>\$ 60,000</b>	<b>\$ -</b>
<b>ICT</b>						
Boom Gates						
Head-End, Fibre, WIFI						
CarrierLead In						
Phones						
CCTV						
<b>Sub Total</b>				<b>\$ 20,000</b>		
<b>FF&amp;E</b>						
FF&E Central Hub (inc P&E for café)	\$ 1	\$ 300,000		\$ 300,000	Share 15% Caf	
Maintenance Shed	\$ 1	\$ -		\$ -	Refer Plant & Equipment	
Camp Kitchen	\$ 1	\$ 30,000		\$ 30,000		
Ablutions	\$ 3	\$ -		\$ -		
Managers Quarters 4x2	\$ 1	\$ 25,000		\$ 25,000		
Staff Quarters	\$ 12	\$ 2,500		\$ 30,000		
Shearers Dormitories 18mx 13m	\$ 6	\$ 4,000		\$ 24,000		
Shearers Quarters Kitchen 10m x 10m	\$ 1	\$ 30,000		\$ 30,000		
Glamping Sites	\$ 20	\$ 5,000		\$ 100,000		
Self Contained Chalets 3x2	\$ 10	\$ 20,000		\$ 200,000		
Disabled Cabin					inc above	
<b>Sub Total</b>				<b>\$ 739,000</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Plant &amp; Equipment</b>						
Maintenance Shed	1	\$ 50,000		\$ 50,000		
Fire Units, vehicles	2	\$ 70,000		\$ 140,000		
Laundry, machines, dryers	1	\$ 20,000		\$ 20,000		
F&B / Kitchen	1	\$ 150,000		\$ 150,000		
<b>Sub Total</b>				<b>\$ 360,000</b>	<b>\$ -</b>	<b>\$ -</b>
<b>TOTAL STAGED PROJECTS</b>				<b>\$ 8,396,000</b>	<b>\$ 2,775,000</b>	<b>\$ 2,260,000</b>
Consultants			12%	\$ 1,007,520	\$ 333,000	\$ 271,200
<b>Sub Total</b>				<b>\$ 9,403,520</b>	<b>\$ 3,108,000</b>	<b>\$ 2,531,200</b>
Contingency			15%	\$ 1,410,528	\$ 466,200	\$ 379,680
<b>TOTAL PROJECT</b>				<b>\$ 10,814,048</b>	<b>\$ 3,574,200</b>	<b>\$ 2,910,880</b>
Add	\$ 1,050,000					
Roadway	7,000	\$ 714		\$ 5,000,000		
Bore				\$ 600,000		
<b>GRAND TOTAL</b>				<b>\$ 16,414,048</b>	<b>\$ 3,574,200</b>	<b>\$ 2,910,880</b>

## Appendix 6. Francois Peron Heritage Precinct Masterplan Concept – Estimated Revenue

REVENUE LINES	#	CAPACITY	OCC %	VISITATION	DENSITY	PAX	Av \$Spend	TOTAL	STAGE 1/ Yr. 1	STAGE 2/ Yr2	STAGE 3/ Yr3	TOTAL
Precinct Access by car		50	100%	15,208	2.5	38,021	\$10	\$380,208	\$380,208	\$408,724	\$395,417	
4WD Park Access cars		45	100%	13,688	2.75	37,641	\$10	\$376,406	\$376,406	\$404,637	\$420,822	
Camping x 40 sites	40	12,167	60%	7,300	2.25	16,425	\$45	\$328,500	\$328,500	\$353,138	\$367,263	
Glamping x 20 sites	20	6,083	60%	3,650	2.75	10,038	\$200	\$730,000		\$730,000	\$759,200	
Groups Dorm	80	24,333	40%	9,733	1	9,733	\$38	\$369,867		\$369,867	\$384,661	
Chalets 3 B/room	6	1,825	80%	1,460	5	7,300	\$375	\$547,500		\$0	\$547,500	
Dorm Catering							\$40	\$194,667		\$194,667	\$202,453	
1 x Public Hot Tub @ 6pax x 8/day	48	14,600	25%	3,650	1	3,650	\$8	\$27,375	\$27,375	\$29,428	\$30,605	
6 x Private Hot Tubs @ 6 pax x 4/day	144	262,800	20%	52,560	1	52,560	\$12	\$630,720	\$630,720	\$678,024	\$705,145	
Nature Experience - Star Gaze	30	9,125	30%	2,738	1	2,737.50	\$15	\$41,063	\$41,063	\$44,142	\$45,908	
Nature Experience - Ranger Guided Walk	30	9,125	40%	3,650	1	3,650.00	\$15	\$54,750	\$0	\$54,750	\$56,940	
Visitor Merchandise						147,262	\$10	\$1,398,992	\$874,821	\$1,062,644	\$1,131,994	
Lite Retail Refreshments						147,262	\$8	\$1,104,467	\$690,648	\$838,930	\$893,680	
Restaurant / Café						21,368	\$40	\$854,708	\$0	\$854,708	\$888,897	
TOTAL						147,262		\$7,039,223	\$3,349,742	\$6,023,658	\$6,830,485	
Deduct DBCA Access Fee									(\$756,615)	(\$813,361)	(\$816,239)	
NET REVENUE									\$2,593,127	\$5,210,297	\$6,014,246	
# Visitation PAX DBCA Park									75,661	81,336	81,624	
# Accommodation PAX									7,300	21,231	23,540	
# Public Day/ Hospo/ Tubs PAX									28,105	30,213	31,421	

[illegible]

GROSS OPERATING PROFIT									468,034	850,297	1,091,537	
									18%	16%	18%	
FIXED CHARGES												
LEASE RENT		1.0%							0	0	60,142	
RATES & TAXES		0.0%							0	0	0	
INSURANCE		1.5%							38,897	78,154	90,214	
RESERVE ALLOCATION/ SINKING FUND												
OPERATOR FEES												
DEPRECIATION												
OTHER EXPENSES		1.0%							25,931	52,103	60,142	
TOTAL FIXED CHARGES									64,828	130,257	210,499	
NET OPERATING INCOME									403,206	720,039	881,038	
									16%	14%	15%	