GASCOYNE REGIONAL TOURISM STRATEGY

15 October 2014
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**ACRONYMS**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tr>
<td>AVG</td>
<td>Aviation Working Group</td>
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<tr>
<td>ACC</td>
<td>Australia’s Coral Coast (RTO)</td>
</tr>
<tr>
<td>ATDW</td>
<td>Australian Tourism Data Warehouse</td>
</tr>
<tr>
<td>AGO</td>
<td>Australia’s Golden Outback (AGO)</td>
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<tr>
<td>BAC</td>
<td>Baiyungu Aboriginal Corporation</td>
</tr>
<tr>
<td>DoL</td>
<td>Department of Lands</td>
</tr>
<tr>
<td>DIT</td>
<td>Durack Institute of Technology</td>
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<td>GDC</td>
<td>Gascoyne Development Commission</td>
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<td>GTB</td>
<td>Gascoyne Tourism Board</td>
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<tr>
<td>LGAs</td>
<td>Local Government Authorities (Shires of Exmouth, Carnarvon, Shark Bay and Upper Gascoyne)</td>
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<tr>
<td>NL</td>
<td>National Landscapes Committee/Program</td>
</tr>
<tr>
<td>RTO</td>
<td>Regional Tourism Organisation</td>
</tr>
<tr>
<td>TDO</td>
<td>Regional Tourism Development Officer</td>
</tr>
<tr>
<td>TWA</td>
<td>Tourism Western Australia</td>
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<tr>
<td>VCs</td>
<td>Visitor Centres</td>
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<td>WAPC</td>
<td>WA Planning Commission</td>
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Funding for this Strategy was provided by Tourism Western Australia, Department of Planning and Royalties for Regions, a Western Australian State Government program.
EXECUTIVE SUMMARY

The Gascoyne Tourism Strategy is designed to build capacity, increase regional collaboration and increase the value of tourism by focusing on laying solid foundations for the tourism industry at a local and regional scale.

The development of this Strategy involved significant input from all levels of the industry, from operators through to Shires, Regional Tourism Organisations and State Government agencies.

The initial steps for this project involved a thorough desktop review, including existing Gascoyne reports, plans and analysis, industry data, and also a review of international best practice tourism structures and initiatives. Following a series of face to face and telephone interviews with tourism industry stakeholders across the region, key issues covering local and regional opportunities, current gaps, future needs, target markets and regional trends were collated from the consultation. These issues were then explored further via a regional tourism expert “Delphi” panel, and a key findings summary was provided to stakeholders.

As a final step in the preparation of this draft Regional Tourism Strategy, a series of consultation workshops in the region were held in Exmouth, Coral Bay, Carnarvon and Shark Bay to provide opportunity for input and feedback on issues to be addressed in the Strategy.

There are three key focus areas for the strategy:

• Visitor Experience – optimising the visitor’s experience to encourage visitors to stay longer, travel more widely, and spend more. This brings into focus the need to share information, increase product knowledge across the region and encourage cross-promotion and packaging of products from one end to the other.

• Growing the Industry – by building industry cohesion, collaboration and advocacy across the region; demonstrating and acknowledging the ‘Value of Tourism’; putting structures and resources in place to promote investment in new infrastructure and new product; improve regional access; and more effectively target higher yielding markets.

• Developing Products and Services - to improve the scope and alignment of the region’s product offering to the needs and expectations of higher yielding visitors.
To deliver on its vision that tourism across the Gascoyne is prosperous and resilient, the region will need to work together to create a strong industry voice, will need to build the capacity of individuals and organisations, and will need to focus collective efforts toward achieving an increase in the value of tourism across the region.

The three themes of Connect and Collaborate, Capacity Build and Contribute Value have been used as an intertwining part of the framework for this strategy.

Ultimately, there are three key strategic objectives that address visitor experience, growing the industry and developing products and services:

1. Improve the rates of visitor satisfaction by 20% from baseline (2015) over three years, across all levels of the industry through leading the implementation of collaborative regional initiatives.

2. Grow the regional value of the tourism industry by $20m over 5 years by targeting industry cohesiveness, access, infrastructure and higher yielding markets.

3. Increase the number of accredited tourism products and services available in the region by 20% and commence 15 new tourism products over the next five years by providing support to industry operators to build their individual and collective capacity.

There is no ‘silver bullet’ that will address current gaps in the Gascoyne tourism industry. Actions designed to achieve the above strategies are planned to be implemented over the next five years using a ‘small steps’ approach that addresses fundamental industry issues first, before realising and consolidating the growth, quality and capacity gains of this effort after the five year implementation timeframe.

The most imperative and fundamental aspect of this strategy is to generate industry collaboration, cohesiveness and partnerships across the region. Initial focus for industry engagement should be at a ‘grass roots level’, starting with a program to demonstrate the ‘value of tourism’ and its importance in the region’s economy to industry operators, stakeholders, small business sector and the resident population.

Strategic priorities will also work to help the National Landscapes Experience Development Strategy come to life through the focus on fundamental regional issues that act as barriers to growth, innovation and alignment with conservation and environmental objectives. Strategic priorities align closely to the National Landscapes themes and hero experiences, particularly in relation to adopting key themes used in the region.
Strategic Priorities are categorised under three themes of connect and collaborate, capacity build, contribute value.

<table>
<thead>
<tr>
<th>CONNECT &amp; COLLABORATE</th>
<th>CAPACITY BUILD</th>
<th>CONTRIBUTE VALUE</th>
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<tr>
<td>• Develop and improve the standard and quality of visitor interpretation (themes, materials, signage, content) across all levels of the industry.</td>
<td>• Improved regional sharing and service standards within the Gascoyne Visitor Centres.</td>
<td>• Support the industry to align its offering to meet and exceed the expectations of a higher yielding market.</td>
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<td>• Develop scope, scale, diversity and interpretation of Aboriginal culture and cultural product across the region.</td>
<td>• Raise community awareness about the Value of Tourism.</td>
<td>• Renewal and reinvention of products and visitor experiences to assist in growing existing markets and attract higher yielding markets.</td>
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<td>• Increase the quality, consistency, depth, coverage and management of regional online information services.</td>
<td>• Significantly improve industry and stakeholder knowledge about visitor needs, expectations and experiences in the region.</td>
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Optimising Visitor Experience

- Build industry cohesion, collaboration and advocacy across the region through a Regional Tourism Board.
- Improve access to, through and within the region.
- Development of strong and productive investor relations that encourages, facilitates and supports new investment in the Gascoyne tourism Industry.

Grow the Industry

- Introduce a new regional role that focuses on supporting the industry and product development across the region.
- Grow existing regional events and develop new, innovative events that are unique to the Gascoyne region.

Increase the Diversity of Products & Services

- Develop priority tourism infrastructure to support the industry to attract new investment, and meet the needs of both higher yielding markets and enhance the offering to existing markets.
- Encourage and facilitate new entrants to the Gascoyne tourism Industry.

- Maximise the economic returns from cruise ship markets.
- Maintain a regional focus on key target markets and empower the region’s tourism industry to meet their needs and expectations.

- Provide the industry with resources, tools and impetus to optimise the standards of product and services delivery.
In order to implement these strategic priorities, an industry-led model for the Gascoyne tourism industry has been developed. Formation of a Gascoyne Tourism Board consisting of limited numbers to oversee, lead strategy implementation is recommended. It is also suggested a number of sub-committees and working groups are generated by the Board to address strategic priorities.

The Working Groups will bring in appropriate stakeholders and expertise as required to progress issues. They will also use the leveraging and influencing powers of key agencies and bodies to promote, advocate and stimulate investment and funding for initiatives. The Working Groups that could be formed at the discretion of the proposed Gascoyne Tourism Board may include:

1. Cruise Ship Committee
2. Marketing and Events Working Group
3. Tourism Excellence Working Group
4. Cultural Connections Working Group
5. Inland Pathways Working Group

The recruitment of a role (a Tourism Development Officer) that supports regional tourism development is recommended to build relationships and facilitate, coordinate and help implement actions of the Board and Working Groups.

This Strategy highlights a wide range of projects and initiatives aimed at growing and developing the industry into the future. Not all these projects and initiatives can be achieved at once. Key projects considered to be ‘quick wins’ include:

‘Quick Wins’

1. Establish Gascoyne Tourism Board and Regional Development Role
2. Regional ‘Value of Tourism / Advocacy for Tourism Campaign to build business and community sentiment towards tourism
3. Establish suitable berthing facilities for cruise ships in Exmouth

A key objective in developing this strategy was the identification of priority ‘flagship’ projects that would add significant value to the region’s tourism industry.

Priority ‘Flagship’ Tourism Projects

Short Term
- Establish Gascoyne Tourism Board and Regional Tourism Development Role
- Regional Value of Tourism/Advocacy for Tourism Campaign
- Regional marketing opportunities and positioning, supported by reliable data
- Establish suitable berthing facilities for cruise ships in Exmouth
- Grow existing markets and develop higher yield market segments
- Enhancement of caravan and camping infrastructure across the region
- Improve air access to and across the region
- Develop Mt Augustus Tourist Park
• Develop Regional Heritage and Cultural Trails

• Develop new and innovative events and continue to grow and build the capacity of existing events that are unique to the Gascoyne region.

**Medium Term**

• Develop and improve visitor interpretive quality and standards

• Develop a suite of cross-regional packages and visitor experiences

• Renew and rejuvenate products and experiences across the region.

**Long Term**

• Ningaloo Coast Road and Gascoyne Junction to Paraburdoo road infrastructure

• Land assembly of Ningaloo coastal tourism nodes for eco retreat developments

In addition there are a range of initiatives linked to regional training, packaging of products at a regional level, sharing of information and data, and support for Aboriginal tourism products. These and other innovative themes will be used to build the scale, scope, diversity and coherence of the regional tourism industry.

Projects considered to be local priorities for each of the main towns / settlements have been also identified and are summarised in Appendix II.

Future tourism development, particularly in terms of new infrastructure or opening up access within the region, must be appropriately managed to preserve the strong tourism, environmental and cultural values of the region.

The Gascoyne tourism industry has a host of unique natural tourism assets; emerging new / upgraded infrastructure, two World Heritage listed areas, and broad acknowledgement that tourism is the key economic driver for the region. These factors all contribute to the region having exciting potential for further tourism development.

The successful implementation of strategies detailed in this Plan will ultimately lead to growth in industry value, product diversity and improved visitor experiences.
THE GASCOYNE REGION – KEY FACTS

The remote nature and spectacular beauty of the Gascoyne region sets it apart from its neighbours.


**Gascoyne Tourism Industry Vision**

Our vision is based on creating an industry that withstands and responds proactively to the fluctuations and ever changing nature of global tourism. We have a solid foundation that will allow us to grow the value of the industry and to continuously focus on creating outstanding visitor experiences.

“Tourism across the Gascoyne is prosperous and resilient”

**Strategic Objectives**

How will we achieve the vision? We have set ambitious objectives based around three fundamental aspects of a destination’s maturity; growth, product development and visitor experience.

1. Improve rates of visitor satisfaction across all levels of the industry.
2. Grow the Industry by $20m over 5 years.
3. Increase the diversity and improve the standard of products and services.

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**Strategy:** Improve rates of visitor satisfaction by 20% from baseline (2015) over three years across all levels of the industry by leading the implementation of collaborative regional initiatives focused on customer service and quality products and interpretation.

**Strategy:** Target industry cohesiveness, access, infrastructure and targeted higher yielding markets.

**Strategy:** Increase the number of accredited tourism products and services available in the region by 20% and commence 15 new tourism products over the next five years by providing support to industry operators to build their individual and collective capacity.
Tourism is the largest revenue earner of all industry sectors in the Gascoyne region, attracting an average turnover of $208 million annually over the years 2011–2013.

Remote wilderness experience and exceptional climate are the main attributes that draw visitors to the Gascoyne. While the visitor’s desire to “get away from it all” and “escape the cold” are key motivators, it is the unique natural attractions of the region that are the undeniable drawcard. The Gascoyne’s natural attractions are world class and include the Shark Bay World Heritage Area, which has an abundance of marine mega fauna and includes the Monkey Mia dolphin experience, and the Ningaloo Coast World Heritage Area, which runs from Red Bluff in the south to Exmouth in the north and offers the pristine turquoise beaches of Gnaraloo Bay, Coral Bay and Exmouth, and the Ningaloo Reef whale shark experience. Inland and to the east are the ancient landforms of the Kennedy Range and Mt Augustus, the world’s largest monocline rock.

The Ningaloo Reef is one of the world’s largest fringing coral reefs and is home to thousands of species of marine life and megafauna including migrating whale sharks, manta rays, turtles and humpback whales. Visitors can experience much of this marine life directly from the beach, making the Ningaloo experience unique in Australia.

The Shark Bay World Heritage Area is one of the few areas around the globe that meets all four natural criteria for World Heritage Listing; natural beauty, biological diversity, natural processes and earth’s history. The amazing beauty of this unique area should be witnessed from land, sea and air. Monkey Mia, in the eastern gulf of Shark Bay, was one of the first places in the world where wild dolphin interaction became possible.

The Gascoyne region also boasts two world class cultural attractions in the Shark Bay World Heritage Discovery Centre in Denham and Gwoonwardu Mia, the Gascoyne Aboriginal Heritage and Culture Centre in Carnarvon.

Source: Gascoyne Development Commission 2014
**Small Steps to Large Leaps**

The Gascoyne Tourism Strategy is designed to build capacity, increase regional collaboration and increase the value of tourism by focusing on setting solid foundations for the tourism industry at a local and regional scale. We need to get the fundamentals right before we can really start to move ahead in leaps and bounds.

Over the next 5 years, lay the foundations with **small steps ...**

Regional engagement, industry collaboration, capacity building of operators and stakeholders, and contributing value to the industry through targeted strategies and actions.

Reap rewards from 2019 onwards with **big leaps forward...**

A sustainable and resilient tourism industry achieving higher yields through industry growth, diversified product and improved visitor experiences.

It is worth noting that the latest growth forecast for tourism in Australia is for annual growth of 2% over the next 5 years (IBIS World, 2014). Our target of $20m total growth between 2014 and 2019 is considered ambitious but achievable considering localities in the Gascoyne are largely positioned in the development phase on the destination lifecycle¹, and the foundation building that we will be undertaking over the next five years.

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¹ Refer Appendix IV
DEVELOPING THE STRATEGY

The development of the Gascoyne Tourism Strategy has been driven by a stakeholder group coordinated by the Gascoyne Development Commission. Many people across the region have contributed to its development, and detailed methodology (Appendix III) and stakeholder consultation lists (Appendix I) are provided for this strategy document.

Methods used in determining the current state of the industry, its strengths and weaknesses and its opportunities going forward included:

- Desktop research and literature review.
- Face to face consultation with industry operators, Shires, Aboriginal stakeholders and tourism and destination marketing agencies.
- An online survey as part of an expert panel of industry representatives (refer Appendix IV).
- Follow-up workshops around the region.
- Discussions with consultants preparing the Ningaloo Shark Bay National Landscape Experience Development Strategy.

THE FRAMEWORK OF THE STRATEGY

Improving what we do as a tourism region is not easy - there is a complex and diverse range of needs and priorities held by communities, individuals, operators, local governments, State government agencies, Federal government agencies and tourism bodies.

The Gascoyne Tourism Strategy strips these priorities back to the fundamentals of tourism. In order to achieve our Vision we see three key themes of **Collaborate and Connect, Contribute Value, and Capacity Build** intertwining across three strategic programs. These are driving forces of change - as improving one leads to improvements in the others. The framework is depicted below:
**Optimising Visitor Experiences** provides actions and activities to build visitor satisfaction with the destination. The section is built upon the understanding that visitor experience encompasses the destination attractions, value, visitor acceptance by locals, accommodation standards, amenities and so on. Visitor experiences are taking on a new dimension in that historically, if a visitor had a bad experience at a destination, he/she would tell 20 people. Now, these comments are told online through sites such as Booking.com, TripAdvisor etc. and comments exposed to potentially hundreds of thousands of people rather than a few. The focus on visitor experience as a fundamental driver of tourism includes building awareness that:

- There are a plethora of governments, organisations, associations, councils, individual operators vying for the attention of prospective visitors.
- The decision making process used by visitors is changing.
- The nature of servicing visitors at a destination is changing.
- (Others’) experiences have become a key variable in the decision making process.

The current model is marketing driven and focuses on servicing at the destination. The visitor experience is based on services at the destination and the experience of the 5 A’s of tourism (access, accommodation, attractions, amenities and activities).

The emerging model recognises that visitor servicing is required before the visitor gets to a destination, once they’re there and after they’ve left. Prospective visitors will hear and read about the 5As via internet sites, social media etc. and their experience will then be shared once they return home. The focus will therefore shift from destination marketing to visitor experience.
Grow the Industry is a broad strategic objective covering a range of key areas that in combination can improve the investment outlook, increase the amount of access to the region through better airline servicing and better road connectivity. Growing the industry is also about pushing forward with developments that are well planned and fit the region’s need for environmental sensitivity and a higher yield from its visitors. Growing the industry is not necessarily about trying to increase volumes of people visiting the region but rather, maintaining visitation levels while building the value each visitor contributes to the industry in terms of their spend on tourism product. Grow the Industry focuses on the importance of encouraging further investment in the industry by being cohesive as a region and having strong investor networks and relations. In supporting higher end market needs, the need for renewal and reinvention is highlighted, along with marketing efforts that combine to create greater impact with these higher end markets.

Some of the goals of growing the industry include:

- Generate more yield
- Increased length of stay of visitors, and therefore increased spend
- Increased visitation of higher yielding visitors
- Greater levels of investment in the Gascoyne tourism industry
- New and improved infrastructure
- Maturity of the industry and increased collective leveraging capacity

The aim is for planned and controlled actions that will result in a prosperous and resilient industry over the medium - long term.

Underpinning efforts to ‘Grow the Industry’ is the need to highlight and demonstrate the ‘value of tourism’ to the Gascoyne region as a whole. This places emphasis on directing efforts at the ‘grass roots level’ in the first instance to convey a clear message to the resident population and business sector in terms of the contribution tourism makes towards; local employment; small business sustainability; regional and localised infrastructure etc. A clear overarching objective is to engender acknowledgement and recognition that ‘We work in Tourism’ and “We embrace Tourism’ as a region, which in turn will lay the foundations for the overall growth of the industry.

Develop Product and Services highlights the importance of product diversity and the need for a Role to be funded that focuses on supporting industry and product development to meet the requirements of current and future markets. It explains that events are a key tool to drive visitation and can also be used to foster regional collaboration. It addresses issues such as berthing infrastructure and transport which are critical limitations to attracting the cruise ship market into the future.
**Outcomes of this Strategy**

To assist in addressing the fundamentals of tourism success including industry growth, diversity and quality of products and services, and visitor satisfaction over the next five years, strategies have been developed to achieve the following outcomes for the Gascoyne:

<table>
<thead>
<tr>
<th>Strategic Focus</th>
<th>What we hope to achieve</th>
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| **Optimise Visitor Experience**     | • Visitors encountering experiences that offer quality interpretation and opportunities to learn and engage, promoting the Gascoyne’s cultural, environmental, and social values including the region’s Aboriginal culture, natural landscapes, and explorer heritage.  
• People choosing the destination and spending more while they are here based on the excellent information on offer, and the fantastic feedback of satisfied visitors.  
• Gascoyne towns are vibrant, attractive and tourism friendly with regional and community cohesion.  
• Improve industry and stakeholder capacity and knowledge about visitor needs, expectations and experiences in the region. |
| **Grow the Industry**               | • Buy-in, engagement and collaboration across the Gascoyne tourism industry and recognition that ‘We are a tourism Destination’.  
• Understand the true value of tourism and collate useful regional industry data to support investment and monitor progress of the industry.  
• Visitor airline access to the region is price competitive, connected, convenient and easy to book (including global distribution system).  
• Investment in new tourism properties, products and infrastructure is growing based on sound data, strong visitor demand and a unified strong regional industry voice.  
• Increased operator and industry profitability allowing for product reinvention, renewal and innovation.  
• Success as a National Landscapes program, with growing International exposure and marketing support delivered through Tourism Australia. |
| **Develop Products & Services**     | • Consistent, high quality experiences that are perceived to be providing value for money.  
• Increased visitor length of stay and higher yields across the region.  
• Demonstrate and foster visitor’s respect and care for our environment. |
LEADERSHIP

There is no question that strong leadership within the tourism industry is paramount to the success of this strategy. The regional model for implementation will need to draw on the Gascoyne’s best leaders to drive change and win support at all levels.

Generating Momentum within: Industry leaders must recognise the strength and value in regional collaboration, and be willing to work from grassroots up to gain support from communities, individuals and key stakeholders. Leaders must strive to inspire tourism operators to be engaged with this strategy, and to implement improvements to their products and service standards and to work together as a region rather than seeing each other as competitors.

Looking in from outside: From an outsider’s perspective the region must be seen to be cohesive, presenting a united and articulate voice that gives confidence and direction to funding bodies, airlines, and investors.

REGIONAL DELIVERY MODEL

The success of this Strategy relies on its delivery. Participation and support for implementation activities is required from all levels of the industry- from those operating tours and managing visitor centres through to State and Federal government agencies.

The regional delivery model we seek to establish is industry driven and involves two new ‘roles’ within the Gascoyne tourism industry:

1. Gascoyne Tourism Board the regional peak leadership group that is industry led, and has membership held by industry representatives. Board size is important and should be limited in numbers for effectiveness.

2. A senior Tourism Development Officer position that reports to the Gascoyne Tourism Board and has responsibility for coordination and communication relating to Tourism Strategy programs, sub-committees, links to National Landscapes initiatives, relationship and partnership management with all stakeholders.

Formation of the Tourism Board would initially be coordinated by the Gascoyne Development Commission. The main funding source identified for this initiative is the Royalties for Regions program.

The delivery model is presented on the next page:
The Board provides overall governance, strategic direction and impetus for action.

It is proposed that working groups and sub-committees of the Board drive the implementation of many (but not all) strategic priorities. They will draw on industry expertise in particular areas and bring in other strategic partners who are critical to the successful implementation of actions. The role of the working groups and committees will be to firstly define and map actions that need to be achieved and then source the financial and technical resources (with support as required from the “Leverages and Influencers” group) to drive the implementation of the strategy. The formation of working groups and / or sub-committees is something that is anticipated to evolve as the strategy is implemented with the specific nature of these groups being determined at a local level as required.
As an example, the Committees and Working Groups that may be formed with the following key partnerships include:

Additional working groups may need to be formed over the five year roll out of the strategy.

These working groups may include, for example:

1. **Cultural connections** working group focussed on Aboriginal product development and interpretation.

2. **Inland Pathways** working group that is tasked with developing connections from coastal communities to Gascoyne Junction / Mt Augustus and into the Pilbara.

Some working groups will continue to roll out new initiatives and will bring in additional skills and expertise as required to deal with the range of actions to be addressed and to keep the group energised and focussed.
Optimise Visitor Experience

The Gascoyne needs to encourage visitors to stay longer, travel more widely, and spend more. To achieve this, optimising the visitor’s experience is imperative.

Optimising the experience and satisfaction of visitors will ultimately increase the value that they contribute to the region. Consistently providing quality visitor experiences across the Gascoyne can directly retain and grow market share, encourage repeat visits and ensure positive word of mouth promotion.

The ‘visitor experience’ consists of many layers including the destination’s attractions, visitor friendliness, perceived value, the level of immersion of the individual and quality of the activities and interpretation, the suitability of the amenities and accommodation, and the sense of place and memories generated by the visit.

Visitor experience needs to be managed as an ‘end to end’ concept, i.e. pre-visit, during the visit and post-visit. By focusing on generating positive experiences and overall visitor satisfaction for both domestic and international visitors the Gascoyne tourism industry can effectively convert “tourists to ambassadors”. The advantage of focusing on visitor experiences as a fundamental driver of the industry is that it is generally within the region’s control.

Global tourism trends further support the case for improving visitor satisfaction/visitor experiences in order to grow the value of tourism in the region and these include:

- A growing trend for shorter holidays (IBIS World, 2013), requiring more focus on achieving growth in expenditure from higher value visitors who stay for shorter periods but spend more, and possibly have higher expectations for quality and service.

- Changing composition and increased diversity of tourism markets. This includes a general trend slowly declining number of grey explorers (Roy Morgan Research, 2012), and increased focus on International and domestic adventure ‘experience’ seekers through the National Landscapes program.

- Emerging trend of family caravan and campers highlights the need to enhance caravan and camping facilities across the region as a priority.

- Increasing use of social media and traveller feedback webpages that have become key drivers of decision making regarding a destination and what to do at the destination.

- Increasingly widespread expectation from all types of visitors for free or low cost WIFI and internet hotspots.
Issues relevant to the Gascoyne that have the potential to taint or detract from positive visitor experiences may include:

1. Poorly trained service sector staff
2. Product development – lack of offering of new products and activities that are needed to match the cyclical nature of the industry
3. Service standards – increasing competition from destinations has increased visitor expectation for quality service
4. Support from resident populations – anecdotally, some areas of regional WA seem to resent the local impacts that tourism generates (e.g. traffic, queues, waste, overcrowding of recreational spots)
5. Lack of WIFI hotspots and free or low cost internet services for visitors
6. Access to and within the region, in particular air services
7. Aging infrastructure

Aiming high to match its two World Heritage areas, the Gascoyne should seek to create a world class experience for visitors and this will support the growth of higher yielding markets:

- Outstanding customer service
- Immersive- allows exploration and participation
- Unique, authentic and has depth/meaning
- Offers value for money
- Provides high quality interpretation of culture, heritage and the environment
- Manages visitor expectations
- Is safe
- Is easy to plan and coordinate / access
CONNECT & COLLABORATE – STRATEGIC PRIORITIES

- Develop and improve visitor interpretation quality and standards across all levels of the industry.
- Develop scope, scale, diversity and interpretation of Aboriginal culture and cultural product across the region
- Increase quality, consistency, depth, coverage and management of regional online information sources.

INTERPRETATION

Interpretation focuses on providing information that engages people and shapes the perception and relationship between the visitor and the local place; it is an integral part of the visitor experience. It is obvious that visitor services and front line staff, tour guides, and customer services personnel can make a significant difference to the visitor experience. Interpretation via face to face interaction is considered the most effective approach to create impact, although it is vital to understand that every type of contact with visitors (including face to face, web, brochures) is an opportunity to make a positive impression.

Building on this understanding, the use of thematic interpretation (i.e. information, communications and product that links or makes use of relevant local or regional themes) offers a powerful means of improving the quality of interpretation and engagement of visitors across the region. Themes to be used should enable the needs of the target market to be met, and also accurately reflect the offer of the destination or tourism product.

In the Gascoyne, there is an opportunity to strengthen and expand the focus on themes that can be used consistently throughout the region. A framework for this is provided through the National Landscapes program, where the positioning of the region is described as Uninhibited Freedom and this follows onto three broad themes and nine hero experiences that could be adopted at the local operator level, town/locality level and regional level:

- Unexpected encounters
- Outback and ocean discovery
- Conservation through participation

Existing Ningaloo-Shark Bay Brands and their definitions and values as mapped out in the area’s National Landscapes Experience Development Strategy should provide direction to all interpretation aspects across the region. A focus on building these market positioning aspects and core themes into new product, review of existing product, regional and local signage, marketing materials, visitor information guides etc. will, over time, build a strong brand and support market positioning in addition to adding to the visitor’s experience.

It is not an easy process to undertake, and it is foreseeable that regional coordination and promotion of the need for better interpretation is required. Training and awareness around interpretation and the integration of themes into all
forms of tourism communication will be required as an ongoing tourism foundations program in the region. As an example of how industry and stakeholders can be supported to improve aspects of their visitor experience and interpretation, Tourism Tasmania provides ‘how to’ resources on visitor experiences and interpretation for its industry operators (www.tourismtasmania.com.au/industry/experiences); they promote the use of better interpretation as an opportunity to renew and revitalise product offerings of individual operators.

**STRATEGIC ACTIONS**

- Encourage and provide training and support to tourism industry stakeholders to adopt consistent use of thematic interpretation across the region.

Communication mediums to be improved with better interpretation include personal (face to face) communication, marketing materials, tour product content, signage, digital media etc.

**Cultural Connections**

Aboriginal tourism provides an important opportunity to contribute significantly to the visitor experience through creating a spiritual, cultural, and emotional connection to the landscape and its people.

The five Aboriginal language groups of the Gascoyne region are Yinggarda, Baiyungu, Malgana, Thadgari and Thalanyji. They form part of a broader cultural grouping that covers the Mid-West and Gascoyne known as Yamitji.


**STRATEGIC ACTIONS**

- Support Aboriginal tourism product development and provide ongoing mentoring support through current four-year Aboriginal Tourism Development Program.

There are only a few Gascoyne based Aboriginal tourism operators, and these are operating from the Shark Bay area. These are held in high regard across the Industry, and the need for further development of Aboriginal product was consistently prioritised by Gascoyne tourism industry operators during consultation phases of this project.
Gwoonwardu Mia

Gwoonwardu Mia Gascoyne Aboriginal Heritage and Cultural Centre is an impressive and relatively new facility located in Carnarvon and represents the culture, art, history and stories of Aboriginal people from all five language groups.

The Centre has exhibitions, performing areas, arts and crafts display, a café and meeting rooms. It is positioned on the main road into Carnarvon. The facility is an asset that appears to have significant scope to increase its impact on tourism in the Gascoyne. This could be achieved through building on its current activities and through supporting and developing Aboriginal owned tourism micro enterprises, expanding its own Aboriginal tourism products and services, and becoming a central interpretative feature within the entire region for Aboriginal tourism. It can also continue to support training and development of Aboriginal people into hospitality employment through its café operations and links with the regional Institute of Technology.

Gwoonwardu Mia won the 2012 MAGNA National Award for its interpretative exhibition.

Baiyungu Track

This project is identified as a ‘hero project’ of the Ningaloo Shark Bay National Landscape Experience Development Strategy. Baiyungu Aboriginal Corporation is the proponent of a proposed 320km trail that will extend from Point Quobba to Exmouth. Sections for walking, mountain biking and sea-kayaking will feature on the trail, along with basic overnight camps and options for off-trail accommodation. The project is currently in the planning/feasibility stage and is looking at funding options. The track offers an excellent opportunity to strengthen and showcase local Aboriginal culture to visitors, and is considered a catalyst for inspiring and encouraging further Aboriginal product development.

STRATEGIC ACTIONS

- Continue to prioritise the development of the Baiyungu Track as a catalyst project identified through the National Landscapes program, and for the development of a Regional Cultural Trail.

Regional Cultural Trail

Building on the need for better visitor interpretation across the region, there is an opportunity for the Gascoyne to create a regional cultural ‘trail’, centred around the Gwoonwardu Mia Cultural Centre. This ‘trail’ can be used in the context of a route for visitors to follow or an area to pass through but mainly as an information and interpretative package (book/brochure, signage, interpretive information and features in each locality) that highlights the key histories, art, culture, music and people of each of the five language groups. Local focus could be placed on Aboriginal elements in each language group area and include the localities Exmouth,
Coral Bay, Carnarvon, Upper Gascoyne and Shark Bay. An example of this in practice is the Kimberley Cultural Trail (Kadar, 2005).

**STRATEGIC ACTIONS**

- Develop a regional cultural trail (long term) as a follow on from the development of the Baiyungu Track.

  *Aligned with work on improving interpretive themes across the region, the cultural trail would consist of interpretive material, a digital app, product and content linked to the Gwoonwardu Mia Cultural Centre as the centrepiece of the cultural trail.*

**Baiyungu Coral Bay Development**

The Baiyungu Aboriginal Corporation holds Lot 500 in Coral Bay, which is a 10 hectare site with tourism zoning. This property offers the Corporation a unique opportunity to develop (in joint venture or on its own), a tourism accommodation property catering specifically for the needs of the self-driving “Dedicated Discoverer” who are currently not well catered for within the Settlement. It is considered that a quality four star property would be ideal on the site.

**STRATEGIC ACTIONS**

- Support and encouragement for Baiyungu Aboriginal Corporation to develop a four star accommodation property on the 10 hectare site of Lot 500 in Coral Bay.

**Online Presence**

An online presence extends to providing comprehensive and consistent information, a means of booking accommodation and product securely and easily, and an active role in monitoring visitor feedback. It includes information portals, accommodation booking sites, social media platforms such as Trip Advisor, and Apps for I-Pad and other tablet computers and phones.

In addition, there needs to be some move made by the tourism industry toward more ‘connectivity’ in terms of providing free WIFI services and internet hotspots.

**End to End Process**

Visitor experiences need to be considered from end to end, that is from before the booking is made through to returning home. Prior to selecting and booking a preferred destination, the growing tendency is for people to explore and learn from the experiences of others who have been there through social media and digital travel platforms such as Trip Advisor.
Experience is important from the very beginning— including the ease of obtaining information about a destination prior to booking, to the seamlessness of the planning, booking and travel process; the actual destination and the quality of its activities, amenities and attractions including the natural and built environment, the immersion in the culture and level of interpretation. The ‘experience’ extends to the end of the visit, and includes the visitor’s ability to share their personal experience with others and provide well-received feedback about their visit.

Enhancing Information Portals
Maintaining a comprehensive, unified, connected, resourced and up to date online source of destination information for the region is becoming an increasingly important component of visitor servicing. Worldwide and even within WA, there are a plethora of governments, organisations, associations, councils, individual operators vying for the attention of prospective visitors.

It is important to acknowledge that the decision making process used by visitors is changing, and that the destination, from the outsider’s perspective, needs to have easy access to comprehensive information at a local level, be easy to book online and look and feel professionally developed.

Given the resources required to create a standalone online portal for the Gascoyne region and the number of sites already with content ‘crossover’, it is considered more practical (at least within the five year timeframe of this Strategy) to further develop, link and make consistent the various existing sites. With a focus on enhancing and expanding existing sites, the following is suggested:

- Create richer product content on existing sites including getting more operators onto the Australian Tourism Data Warehouse (ATDW);
- In the short term, working with Regional Tourism Organisations (ACC & AGO) to enrich content on their websites including drive itineraries and events;
- Dedicating some resources to managing the destination’s profile on Trip Advisor and other forums; this role would include addressing negative critiques, posting daily “what is happening today” images of people engaged in activities; and
- Communicating with target audiences via TWA and the RTOs customer bases, including the creation of newsletters and blogs about experiences in the region.
- A longer term aim could include the development of a dedicated regional tourism portal.
STRATEGIC ACTIONS

- Improved content and linkages between Gascoyne destination webpages and information portals, including resourcing a part time role to manage negative destination feedback and provide regular updates on TripAdvisor etc. in addition to developing communications for customer bases of TWA and RTOs.

Design content improvements around the “interpretive experience” themes from the National Landscapes program that also serves as a comprehensive regional information source.

USE OF DIGITAL/SOCIAL MEDIA PLATFORMS

Visitor experiences are taking on a new dimension in that historically, if a visitor had bad experiences at a destination, he/she may tell 20 people. Now, these comments are told online through sites such as Booking.com, TripAdvisor etc. and comments exposed to potentially hundreds of thousands of people rather than a few. The experiences of others have become a key variable in the decision making process. There is undoubtedly a need for all industry operators to be across the latest use of the web for trip planning and feedback. Training and support in this area is required across the region.

STRATEGIC ACTIONS

- Undertake a regional Value of Tourism training program and provide tools for the local industry to implement social media campaigns; contribute to feedback forums and deal with issues arising and evolving from such platforms.
CAPACITY BUILD – STRATEGIC PRIORITIES

- Improved regional focus on service standards within Gascoyne Visitor Centres.
- Raise awareness about the ‘value of tourism’ and the importance of positive visitor experiences.
- Significantly improve industry and stakeholder knowledge about visitor needs, expectations and experiences in the region.

VISITOR SERVICING SKILLS & ATTITUDES

Visitor servicing is all about creating a positive and satisfying experience for visitors. Some of the major determinants of a destination that can add to visitor satisfaction include:

- the friendliness and welcoming nature of the community;
- the quality and attitude of tour operators;

A culture of customer service across the tourism, retail and hospitality sectors is a vital requirement for any destination; such a culture can be difficult to maintain in places like the Gascoyne where staff turnover is often high due to the use of temporary international workers who are on a working holiday.

In creating a service culture where visitors are made to feel welcome and valued, the community as a whole must understand the benefits of tourism to their local economy and its role in providing social benefits in addition to economic benefits. Sometimes community residents only recognise the drawbacks of having their town overrun by visitors and see the benefits going only to direct businesses.

Benefits are far more wide reaching as, for example, tourism is a labour-intensive industry that stimulates employment in the region; many tourism operators are micro to small business operators and the effects of visitor spend are felt quickly and directly in the community as a whole. The value of tourism in the Gascoyne has been estimated at around $208M and is the region’s bigger economic contributor and employer\(^2\), placing even more emphasis on the need for its importance to be acknowledged within the general community.

The Tourism Council of WA (TCWA) delivers Customer Service Training on a statewide basis under its funding agreement with Tourism WA. TCWA has advised that it would be willing to deliver more frequent workshops if their travel expenses were met by local destinations and they would provide the staff to deliver the training. TCWA does a number of different workshops from customer servicing, Asia Ready, social media, entry and advanced tourism workshops.

\(^2\) Tourism WA, Gascoyne Visitor Fact Sheet, Gascoyne Development Commission Area, Year ending September 2013.
STRATEGIC ACTIONS

- Undertake a regional campaign to raise the awareness of the value of tourism amongst the general community.

Visitor servicing is an ‘end to end’ process; destination marketing and attraction of visitors to the region is just the front end of the visitor experience. Failure to deliver on promises made through marketing and failure to deliver good customer service will severely impact satisfaction with the destination. This can result in declining levels of repeat visitation (a particularly important component of the caravan and camping sector) and it is much harder to attract a new visitor than it is to retain an existing one.

Poor customer service can also generate significant negative publicity on sites such as Trip Advisor which are increasing prominence as destination decision making tools for discerning visitors. Tourism operators must be willing to continually review and improve on their visitor servicing efforts. It is acknowledged that training is likely to be seen as a low priority for business owners who have other pressing needs taking up their time. However, innovative and practical means of delivering visitor servicing training support should be developed as a flagship program supporting a culture of outstanding visitor servicing within the region.

STRATEGIC ACTIONS

- Coordinate a regional program of customer service training for tourism operators, staff, and service sector staff.

*Training programs may be packaged into a “Tourism Excellence Program” supported by local chambers of commerce. Funding through Government sources may be required in order to encourage participation through low/no cost to participants.*

Visitor servicing in the region currently focuses primarily on visitor centres to provide information and sell accommodation and tour products. However, this role is changing as direct competition (principally through online activities) is more aggressively being undertaken by accommodation providers and tour operators. There is also a growing reliance by visitors to use web based portals to access information and get the best price. This trend is addressed previously in the “Online Presence” topic (page 26).

A number of other means of providing quality visitor information can be implemented across the region, and offer opportunities for collaboration amongst the industry, regional shires and other tourism stakeholders. These may include:
- Roadside information bays
- Visitor radio services
- Interpretative signage including thematic approaches (e.g. cultural connections, wildlife)
- Electronic kiosks
- Apps and smartphone enabled websites

The Shires of Shark Bay, Carnarvon, Exmouth and Gascoyne Junction can also play a large role in enhancing visitor servicing through their responsibility for development and maintenance of public amenities, town beautification and of course through their support of visitor information centres. Of particular interest to Carnarvon which sees a lot of travellers ‘passing by’, streetscapes and ‘entry statements’ involving beautification of access roads into main towns can also influence the propensity of visitors to take the time to call in and spend money in the town.

**Visitor Centres**

There is no question that Visitor Centres offer excellent local knowledge and are a key factor in adding to the visitor experience by providing relevant interpretative and general information. A skilled and well managed visitor centre can increase a visitor’s length of stay and result in increased expenditure on accommodation, tour product and general spending. For the Gascoyne they are a primary local source of face to face interaction between the visitor and the community.

A current opportunity exists to improve the level of interaction between visitor centres across the region. A lack of interaction means the Centres tend to operate in ‘silos’, and don’t maximise the opportunity to increase overall length of stay or uptake of tour product in the Gascoyne region through cross promotion of neighbouring areas. By visitor centres being able to learn and inform visitors of what products, attractions and facilities neighbouring localities have on offer, visitors will receive better information and possibly a better overall visitor experience.

In time, under a mature collaborative model, an opportunity could also evolve to provide cost savings for local shires, with visitor centres potentially being capable of sharing administrative responsibilities and costs across the region.

With the Visitor Servicing review completed recently by the State Government, Tourism WA is currently progressing a request for funding of various matters relating to visitor centres; professional development training may well be addressed through this and the Gascoyne’s Visitor Centres should keep a watching brief on this Tourism WA initiative.

**STRATEGIC ACTIONS**

- Develop an annual visitor centre professional development program for the Gascoyne or subject to TWA’s request for funding for Visitor Centre issues, coordinate local utilisation of any new Statewide initiatives for visitor centre training and development.

  A focus on collaboration and capacity building and incorporate staff exchanges, regional Visitor Centre forums and possibly an intranet for sharing of information.
A Tourism Excellence Approach

There is an opportunity to work towards achieving what other destinations have done successfully in creating a joint approach between the visitor centres in the region, the industry operators, RTOs, TWA and local governments to create a ‘virtual’ Gascoyne Centre of Tourism Excellence. This approach has been used successfully by the State Government in Victoria (www.tourismexcellence.com.au).

It is considered a practical way of tying together elements of visitor servicing training, community awareness building, and encouragement of collaborative region wide focus on optimising visitor experience. As stated by the Victorian model, “it is a deliberate attempt to integrate professionalism and an expectation for excellence across all facets of the tourism experience, from the perspective of the individual, the business, the destination, and industry networks, as well as those suppliers and agencies that influence tourism business outputs.” In essence, the visitor experience is targeted in order to create competitive advantage over other destinations.

STRATEGIC ACTIONS

- Review and learn from the Victorian Tourism Centre of Excellence and other best practice case studies in order to create a similar (albeit much smaller scale) approach to optimising visitor experiences with the Gascoyne.

Visitor Research

A fundamental question that needs to be asked in the region is “how do we know what our visitors need and want, and are we giving them the experience they seek?”

The current level of research data available through Tourism Research Australia does not have the regional focus, survey size, or depth through qualitative information available for use at the local level to determine what is needed to improve the visitor experience across the region.

In order to effectively focus on improving visitor experience, baseline market research around visitor perception/expectation and visitor experience needs to be implemented by tourism operators across the region. This is a reasonably easy undertaking so long as it is centrally coordinated; An annual operator-driven program would also help promote collaborative regional responses to survey data. Individually and collectively, data and insight gained from visitors can be used to inform and underpin key business decisions.

STRATEGIC ACTIONS

- Develop a coordinated approach to Visitor data collection.

  Implementation should consider an annual industry operator supported visitor survey, regional monitoring of online feedback sites and investigate the installation of a permanent electronic “feedback station” at airports and visitor centres.
Finding out how satisfied visitors are within the region through baseline research is the first step in understanding their needs for improvement, but this information needs to then be acted on by operators. Results of visitor satisfaction surveys may indicate a need for collective approaches to eliminate sources of dissatisfaction such as:

- Supporting local operators improve content or interpretation
- Supporting local operators meet or seek accreditation requirements
- Developing and Coordinating targeted training in customer service across the region
- Assisting in dispersal and communication of information to allow operators to better respond to market trends.
CONTRIBUTE VALUE – STRATEGIC PRIORITIES

- **Support the industry to align its offering to meet and exceed the expectations of a higher yielding market through focusing on industry adoption of accreditation and standards.**

ACCREDITATION & STANDARDS

The tourism industry in the Gascoyne has clearly stated intent to target a higher-yielding visitor into the future. As mentioned previously, visitor experience needs to align with visitor expectations, and higher yield visitors tend to have higher expectations of quality accommodation, quality servicing, and quality tour product.

There is considerable scope across the Gascoyne for improvements, and the use of a tourism accreditation program could provide the impetus and tools for operators to collectively improve their offering. In doing so, the Gascoyne tourism industry would effectively be “collaborating to compete” with other destinations. Tourism accreditation and standards, particularly in the eco-tourism market would also support the ongoing implementation of National Landscapes initiatives.

Accreditation programs look to add value to tourism businesses by creating a consistently high level of customer service and product delivery. Eco tourism accreditation programs such as Eco Tourism Australia have additional objectives to ensure protection of natural environments through low impact tourism.

The Australian Tourism Accreditation Program (ATAP) is a nationwide project, which aims to give tourism operators across Australia the ability to apply for 'Australian Tourism Accreditation' online. The ATAP aims to provide visitors with quality assurance about product and interpretation quality, value for money, and safety.

Accreditation assists operators in the development of professional management systems that are designed to lead to reliability, consistency and predictability in the operation of the business which in turn results in improved customer service and satisfaction.

The Tourism Council of WA is funded by Tourism WA to provide one on one support to businesses wishing to become accredited. This program could be better utilised in the Gascoyne and perhaps an initiative to incentivise the adoption of accreditation could be implemented by the region (e.g. all new accredited businesses get a discounted advertisement in the holiday planner, or a Visitor Centre display).

STRATEGIC ACTIONS

- Develop a regional incentive program to assist and encourage local tourism businesses to undertake formal accreditation programs in eco-tourism or the Australian Standards for Tourism through the Australian Tourism Accreditation Program. Seek support through the Tourism Council WA.
Innovative Packaging

The Ningaloo-Shark Bay National Landscapes Experience Development Strategy provides three priority themes that have nine ‘hero experiences’. This new focus on the region offers encouragement to the industry to create innovative packages linking and packaging products across the region, leveraging the diversity of experiences available to maximise appeal to a greater number of visitors.

Innovative packaging could involve leveraging opportunities linked to the above destination themes and hero experiences to create new packages and products, for example:

- a ‘Big 5’ marine adventure - encounters with dolphins, whales, dugongs, manta rays, and whalesharks where visitors can undertake a packaged itinerary starting with dolphins and dugongs in Monkey Mia and their way up the coast to Exmouth, ticking off their ‘Big 5’ animals as they head out on tours with different operators in Coral Bay and Exmouth.

- Sail-cruise along the Ningaloo Coast from Coral Bay/Exmouth/Carnarvon down to Shark Bay and over to Dirk Hartog Island eco-lodge stay, taking in the explorer history of the area.

Packaging and developing exciting itineraries that take in all the best parts of the region help to make the choice easy for visitors. Other aspects that can be worked into new and innovative packages / itineraries include heritage, history and cultural opportunities across the region (e.g. Shark Bay Discovery Centre, Gwoonwardu Mia, One Mile Jetty Heritage Precinct, Kormoran site (Quobba), Carnarvon Space and Technology Museum, Vlamingh Head Light House etc.) As previously mentioned, promotion of these innovative itineraries could be part of enriching regional information portals mentioned on page 27.
Local Area Upgrades & Improvements

With a focus on optimising visitor experiences, and understanding that infrastructure and amenities have an impact on this, there is an ongoing need to support the upgrading and beautification of the local towns/localities of Exmouth, Coral Bay, Gascoyne Junction, Carnarvon and Denham. These projects are in addition to Strategic Priority Projects designed to grow the industry, detailed on page 47.

Gascoyne Junction

Gascoyne Junction’s new hotel and campground is open for business. This initiative is applauded and now acts as a gateway for visitors to venture into the Kennedy Range and Mt Augustus. In terms of local area improvements it is recommended that focus to revitalise the town is sustained with regard to ongoing ‘greening’ and landscaping of the town precinct. Also, maintain and develop new infrastructure over time including signage, shade, information boards etc.

There is a need to ensure the road access to Kennedy Range is maintained to the best possible standard.

Specific local projects identified in the Shire include:

- Kennedy Range Loop Road and visitor facilities
- Gascoyne River Crossing Upgrade
- Local Interpretation infrastructure, including:
  - Old Pub Site
  - Gascoyne Murchison Outback Pathways
  - Cultural Trails

Exmouth

Exmouth has a well-positioned visitor centre and reasonable town infrastructure. A new $30 million “Ningaloo Centre” project has recently been committed and this will further showcase the region as an ‘entry statement’ to town. The Centre will be the new home for the Exmouth Visitor Centre and will include exhibition and interpretive spaces telling stories from “Reef to Range”; education and research will have their space and contribute to providing valuable information about the Ningaloo World Heritage Area.

Infrastructure development include keeping a focus on maintaining quality standards of public infrastructure (toilets, information bays, signage etc.), and continuously working on the ‘beautification’ of the town centre to make it more appealing to visitors. Specific local projects identified in the Shire include:

- Black waste dump point
- Continue Exmouth town centre enhancement and attractiveness
- Continue improvements to Town Beach area, Exmouth Gulf Foreshore
- Encourage development of small scale tourism retail and offices and eateries/restaurant in the Marina development area
- Improve Tantabiddi Boat Ramp with a sand trap structure
Corral Bay

Coral Bay is in the process of having a new settlement plan endorsed by Cabinet. The settlement has some clear priorities for infrastructure development, including:

Major development:

1. Re-routing the main entrance road to the rear of the settlement, and making the current road for pedestrian access only.
2. New ablution block, information bay on the foreshore and continued beautification of foreshore area.

Other moderate scale projects identified include:

- Redevelopment of lookouts and access infrastructure
- Entry Statement and information bay at town entrance

Carnarvon

Carnarvon has improved its town centre in recent years, and a continued focus on creating a tourism precinct on the Fascine foreshore will further enhance the appeal of the town centre. Gwoonwardu Mia has the 2012 MAGNA national award-winning interpretative exhibition; the Museum at the One Mile Jetty (including café) was opened in July 2014; phase two of the Space Museum is in development together with the rejuvenation of the Gascoyne Food Trail/Plantation drive.

The Blowholes area is currently in the final stages of a review by Shire to implement a Reserves Management Plan. The Management Plan will provide a framework to guide the future development and management of recreation and tourism uses at the Blowholes, including camping and the removal and replacement of existing shacks. Implementation of the Management Plan will ensure that visitors can continue to enjoy the area’s natural attractions and landscapes in a more sustainable manner that better aligns the reserve with environmental protection and low impact principles being conveyed in neighbouring coastal areas on the Ningaloo coast and in Shark Bay.

Specific upgrade/enhancement projects identified in the area include:

- Airport redevelopment.
- Enhancement of tourism signage, including Welcome Statement.
- Investigate RV Friendly options.
- Upgrade of public facilities.
- Redevelopment of Carnarvon Yacht Club Marina.
- Ongoing Enhancement and Development of the Carnarvon Fascine.
- Ongoing enhancement of the Main Street.
- Signage at the southern end of the Ningaloo reef.
- Renew and rejuvenate activity parks for children.
Denham

Denham’s foreshore area has been upgraded with park facilities in recent years, which are heavily utilised by residents and visitors. It is noted that the town has funding allocated for foreshore redevelopment through the Gascoyne Revitalisation Plan to be completed by 2016.

Specific local projects identified in the area include:

- New recreational jetty in Denham.
- Enhanced and additional tourist signage.
- Upgrade and revitalisation of Charlie Sappi Park on Knight Terrace with interpretive signage and tourism facilities.
Grow the Industry

Grow the Industry is a broad strategic objective covering a range of key areas that in combination will contribute towards the strategic vision for the tourism industry in the Gascoyne region. The key inputs to growth can be summarised as:

- Increased visitation
- Increased length of stay of visitors, and therefore increased spend
- Greater levels of investment and employment in the Gascoyne tourism industry
- New / improved infrastructure
- Maturity of the industry and increased collective leveraging capacity

The aim is for planned and controlled actions that will result in a prosperous and resilient industry over the medium - long term.
**CONNECT & COLLABORATE – STRATEGIC PRIORITIES**

- *To build industry cohesion, collaboration and advocacy across the Gascoyne region.*
- *To improve access to, through and within the region.*
- *Development of strong and fruitful investor relations that encourages, facilitates and supports new investment in the Gascoyne tourism industry.*

**INDUSTRY COHESION & COLLABORATION**

Tourism operators and stakeholders in the Gascoyne region have a strong passion for the industry and the region’s unique natural assets that underpin the key attractions for visitors.

However, the tourism industry is disconnected. The lack of a regional outlook was evident from the results of the Delphi Panel where participants focused on their local area rather than regional priorities. Results demonstrate that more focus needs to be placed on:

- Development of a collective push for regional growth
- Development of agreed regional tourism priorities
- Building the capacity of the regional tourism industry in order to leverage greater / increased stakeholder support

Put simply, the tourism industry will have far greater prospects of leveraging funding and stakeholder support for tourism projects and initiatives in the region by demonstrating that they ‘speak as a united industry’.

Although the tourism industry is widely acknowledged as the key economic driver for the Gascoyne region there is a need to continue to promote the importance and value of the industry, and its contribution to growth of the regional economy (i.e. employment creation, supporting infrastructure, public facilities & amenities).

The need for greater industry cohesion and collaboration is a recognised industry-wide issue but many regional tourism industries have struggled to identify the most effective implementation model, as there is reluctance to add more layers to regional tourism structures.

The process of developing and facilitating greater industry collaboration requires strong leadership. It must also be industry led and driven. Best practice models indicate that this can be effectively achieved through the creation of a regional Tourism Board (formal or informal). This Board would function as the key reference group in relation to providing direction around strategies and priorities that will contribute to industry growth. Success of a Regional Tourism Board is dependent on its members and must take account of broad geographical representation; specific skills; tourism knowledge and experience; understanding of regional issues and priorities; and ability to commit necessary time and effort. Therefore, selection
to the Board should be based on predetermined criteria and skills requirement’. However, the precise nature of a proposed Regional Tourism Board is best determined from within the region.

A model based on creating a Regional Tourism Board also needs to be resourced by way of a Regional Tourism Development Officer (TDO), or similar position. This role would focus on implementing agreed strategies, none more important than building the level of collaboration and cohesion across the tourism industry in the Gascoyne region whilst providing a central point of contact.

The Regional Tourism Board may choose to Incorporate if it wishes to receive funding and employ the Tourism Development Officer, or alternatively it could seek to act solely as a reference group that provides input to the role and direction of a tourism development position within the Gascoyne Development Commission (for example).

Efforts to develop industry leadership and advocacy at a regional level will be further enhanced from support of the broader business community and resident population. Put simply, the aim is to have the entire region championing the value and importance of tourism in the Gascoyne region.

**STRATEGIC ACTIONS**

- Create a Regional Tourism Board that is industry led and driven.
- Develop and implement a regional “Value of Tourism” campaign to increase advocacy for the tourism industry.

The Regional Tourism Board represents a collective voice for the industry, assumes a large part of the responsibility to advocate and lobby on behalf of the regional tourism industry, and uses a collective voice to leverage support for priority industry projects and initiatives.

**Access**

Consultation undertaken with industry operators and stakeholders highlighted a number of key issues and concerns regarding access to, and within the region. These issues include land, sea and air access.

**Air Access**

The level of air access varies considerably across the Gascoyne region. Exmouth is currently serviced by domestic mainline carriers Qantas Airways and Virgin Australia; however, on 12 July 2014 Virgin Australia announced that as of 13 October 2014 they will no longer be servicing Exmouth. The towns of Carnarvon and Denham are serviced by Skipper’s Aviation; while Coral Bay and Gascoyne Junction have no Regular Public Transport (RPT) service.

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3 It is assumed that most key tourism locations would have knowledge of potential candidates.
Airlines servicing the region operate on what are generally considered marginal routes outside of peak tourism season periods. As a result airfares can be prohibitive to promoting leisure travel as airlines strive to maximise yields.

Skipper’s Aviation does not have a dedicated wholesale arm as part of its overall operations (unlike Qantas and Virgin Australia), instead using Discover Australia to develop and promote leisure packages. They therefore do not have a comparable global tourism brand and global distribution system. This is a critical issue for Carnarvon and Monkey Mia.

With the withdrawal of Virgin Australia, it leaves one mainstream carrier operating in Exmouth and may not be in the interests of the industry due to lack of competition; However, it may present greater opportunities for connectivity within the region through improved use of Qantas’ wholesale arm which has global consumer awareness and reach, and a network fleet that enables more flexibility in terms of scheduling and seat capacity.

In order to improve air access to and within the Gascoyne region, the focus needs to change to positive engagement with airlines. Of equal importance is the need for the tourism sector to collaborate with other industries (e.g. Oil & Gas) to negotiate mutually beneficial outcomes in this field. Efforts to improve air access to the Gascoyne region for the leisure market should also include exploring charters (packaged product) on a seasonal basis. A Regional Aviation Working Group is recommended to implement these efforts; it is proposed that the group be a small, informal working group of the Gascoyne Tourism Board. Importantly, the make-up of this group should be based on skills, knowledge and ability to influence outcomes. Keeping this group to a limited number with a specific charter will help to ensure efforts remain focussed on improving aviation access.

STRATEGIC ACTIONS

- Establish a Regional Aviation Working Group.

  Working Group to develop a business case (solution-based approach) to optimise air access to and within the Gascoyne region – i.e. consider aircraft types, schedules, seasonality, provision of global distribution system etc.

ROAD ACCESS

Road access to the Gascoyne region is facilitated through major highway networks and existing pathways such as Warlu Way and the Gascoyne - Murchison Outback Pathways as important linkages that are cross regional and provide adequate access for the predominant self-drive visitor.

A key problem for self-drive visitors is the likelihood of ‘backtracking’ during their journey through the region. While this is largely unavoidable due to the geographic location of the town centres like Denham and Exmouth, industry consultation
highlighted the fact that one-way car hire fees are not conducive to encouraging visitors to explore more of the region due to excessive costs.

The need for visitors to ‘backtrack’ was also brought to light with regard to the coastal region north of Carnarvon i.e. Blow Holes, Quobba, Red Bluff and Gnaraloo. Access to these areas is essentially by the same route; however road access between Gnaraloo and Warroora is restricted to a rough, unsealed track that is not recommended for travellers unless fully equipped. Therefore, visitors that may be considering venturing further north than Gnaraloo need to backtrack to Carnarvon to access Coral Bay, Exmouth and Cape Range National Park / broader Ningaloo Coast. This issue is coming into increasing focus due to the “Ningaloo Coastal Exclusion” process which proposes the excision of a coastal strip from the bottom of the Cape Range National Park to the Blowholes in the Shire of Carnarvon.

The Gascoyne region is characterised by a strong self-drive visitor market which is in common with the Pilbara region.

Efforts to grow tourism from a regional perspective should not necessarily be based solely on increasing visitor numbers: Lengthening visitor stays will also contribute to industry growth. This could be achieved by improving access and making it easier for visitors to explore other parts of the region. Facilitating better access for this market through the inland Gascoyne across to Paraburdoo provides an opportunity to link the Gascoyne’s coast with Karijini National Park thereby stimulating greater visitor movements through inland areas, and the potential for new / improved self-drive itineraries. The ability to link a series of tourism drawcards such as Karijini National Park, Mt Augustus National Park, Kennedy Range National Park and the Ningaloo Coast is hindered by limited access through the inland areas of the Gascoyne and adjoining regions. Existing unsealed roads are used by visitors, however they are only suited to visitors who are suitably equipped in terms of vehicle types and / or caravan, camper trailer etc. For a large majority of the self-drive market to the region the road is a disincentive to explore further inland.

In the context of any potential new or improved road routes in the Gascoyne region it is vitally important to ensure that consideration is given to resources required to manage the increased visitation through these areas, as well as managed and ranges of visitor accommodation, day use and recreation areas and access points along the coast. With this in mind it is recommended that close collaboration between tourism stakeholders and State agencies such as DPaW takes place.

**STRATEGIC ACTIONS**

- Target specific initiatives that will enhance “visitor flows” to and within the region via road links.

*Priority projects include a link road between Gnaraloo/Warroora to Coral Bay, and links inland between Gascoyne Junction and Karijini National Park in the Pilbara.*
**Marine Access**

The level of marine access varies across the Gascoyne region although there appears to be a reasonable level of industry satisfaction in terms of general boating facilities, with the exception of Shark Bay where many stakeholders expressed support for a marina in the town. In Shark Bay, facilities are not considered conducive to encouraging the development of new marine tourism products, or attraction of visitors who may seek to use their own vessels as part of holidaying in the area.

Cruise ship access to Exmouth is limited due to a lack of berthing facilities, and transport for visitors whilst on shore. Exmouth is becoming increasingly attractive as a stopover port for cruise ships originating from South East Asia, however at some times of the year vessels are curtailed by strong winds, making a stop in Exmouth impossible. These issues are addressed in the Cruise Ship Market Expansion topic (pg. 48)

**Investor Relations**

The Gascoyne region is generally considered to be in the ‘Development Phase’ of the Tourism Life Cycle (refer Appendix V). A range of tourism development opportunities have been identified such as; Coastal tourism nodes (WA Planning Commission Land Use Study), Whitlock Island and Mt Augustus Tourist Park (as part of Gascoyne Regional Blueprint) and others.

The process of realising these opportunities is dependent on creating the right investment conditions and encouraging investors / developers to ‘do business in the region’. Importantly, this aspect should not be viewed in isolation of other factors. For example, a cohesive and collaborative tourism industry is integral to creating attractive investment conditions and providing investment confidence.

Views put forward by some industry operators indicate a reluctance to encourage the attraction of external investment as this is perceived as inviting more competition within the regional tourism industry. Conversely, the majority of industry stakeholders believe external investment in the region’s tourism industry should be strongly pursued as it represents a key avenue through which industry growth can be achieved.

A key gap for the industry at present is a sense of disconnection with key tourism brands and investment groups. The attraction of major tourism ‘brands’ into the Gascoyne region should be a focus and openly encouraged. The region has two World Heritage listed areas and therefore global awareness, however this is not

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4. It is acknowledged that some key tourism brands currently exist however more could be attracted.
matched by the scale of tourism investment, presence of global brands or facilities matched to a world-class natural environment.

It is considered likely to be up to the Local Government Authorities, Gascoyne Development Commission and Tourism WA to continue to drive investment attraction. However the Industry needs to play a role in encouraging these agencies to continually push for tourism investment attraction in the Gascoyne. Key stakeholders in the region should place priority on supporting GDC and Tourism WA in getting key development sites ‘investor ready’ (e.g. address issues such as heritage, environmental clearances and other site development approvals in readiness for investment).

In some cases tourism investment might focus on a particular town or location. However this should not be perceived as favouring one location over another as it could result in broader, indirect benefits for the Gascoyne region (i.e. encourage extended visitation / itineraries, increased visitor spend and so on).

STRATEGIC ACTIONS

- Support initiatives by Tourism WA and Gascoyne Development Commission to quantify and promote investment opportunities at all levels of the industry.

  *Implementation of this strategic action is based on the development of a Regional Tourism Investment Prospectus to clearly state that the tourism industry in the Gascoyne region is ‘open for business’ and encourages new entrants / industry partners.*
CAPACITY BUILD – STRATEGIC PRIORITIES

- Develop priority tourism infrastructure to support the industry to attract new investment, meet the needs of higher yielding visitors and to meet current market demand.
- Encourage new entrants to the Gascoyne tourism industry.

TOURISM NODES

Consultation suggests that there is strong support from the tourism industry to attract higher-yielding visitors. Whilst the caravanners, campers and grey nomads are important to tourism in the region, the majority of facilities and amenities along the Ningaloo Coast that cater to these lower-yield markets are not generally of a standard that can attract the higher yielding market segments to the region into the future.

The development of new / improved higher-end accommodation alternatives and facilities across the region are essential. However, it is paramount to maintaining the integrity of the region’s environmental and tourism values that tourism development along the Ningaloo Coast is appropriately managed.

The WA Planning Commission - Ningaloo Regional Strategy Carnarvon to Exmouth (WA Planning Commission, 2004) highlights a number of potential managed tourism development nodes. Three of these would be very suitable for eco-lodge/eco safari and wilderness retreat type developments and could be created as part of the proposed pastoral excisions in 2015. Example developments that could be established similarly on the nodes include Berkley River Resort (Kimberley), Saffires Freycinet (Tasmania), and Southern Ocean Lodge (Kangaroo Island, South Australia).

STRATEGIC ACTIONS

Support the development of three coastal EcoLodge Tourism Nodes as identified in the WA Planning Commission - Ningaloo Regional Strategy Carnarvon to Exmouth (WA Planning Commission, 2004).

In Western Australia, one of the key impediments to facilitating growth of the tourism industry is access to land, particularly where pastoral land is involved; The concept of excising parcels of land as part of the proposed 2015 excisions provides a unique opportunity to overcome this. The proposed excisions would be a major step forward in terms of addressing land assembly processes and getting sites to the point where they are investor ready.
**Tourism Infrastructure**

The ongoing development of tourism facilities and other supporting infrastructure is critical to the future growth of tourism in the Gascoyne region. The following strategic projects have been identified in the region as those that can directly grow the industry and are in addition to local level infrastructures projects designed to optimise visitor experiences (listed on page 36).

**Mt Augustus Tourism Infrastructure**

Mt Augustus is located 484km east of Carnarvon in the Shire of Upper Gascoyne. It is the world’s largest monocline rock formation, rising some 1106 metres above sea-level, and is about eight kilometres long. It is known as Burringurrah by the local Wadjari Aboriginal people and located within the Mt Augustus National Park.

There are no current camping facilities within the National Park however a 49km driving trail and adventure walk trail are permitted activities. Camping facilities are provided at Mt Augustus Tourist Park which is located on Mt Augustus Station on the edge of the National Park boundary.

In 2009, a pre-feasibility study into the construction of a “Mount Augustus Base Camp” was completed. This study was used to determine the broad feasibility of new tourism infrastructure within close proximity to Mt Augustus and clarify associated land assembly processes. Following on from this report, the Shire of Upper Gascoyne recently commissioned URS Australia Pty Ltd to develop a Business Case for tourist accommodation at Mt Augustus on the site identified in the 2009 pre-feasibility report. The accommodation proposal includes camping and caravan facilities, ensuite cabins, a restaurant and pool. The Business Case, released in May 2014, outlines key findings relating to the viability of the proposal:

1. Capital investment costs are critical to the viability of the project - The sensitivity analyses suggest an external grant of at least $4 million will be required to achieve an Internal Rate of Return of at least 10 per cent and to encourage a private co-investor to take on the project.

2. Viability requires ongoing growth in visitor numbers - The base results assume an annual growth rate, over the next 21 years, of four per cent per year in visitor numbers from historical levels achieved with the existing Mt Augustus Tourist Park business. Without this growth rate, the size of the proposed facility would not be justified. Growth would need to be supported by improving air access to the region, and improving road access to Paraburdoo.

The development stages required to progress the planned Mt Augustus proposal are addressed in the Business Case prepared by URS (2014):

- As it stands the project does not have a proponent or a co-investor to develop and manage the project. The current owners of the Mt Augustus pastoral lease and operators of the existing accommodation facility are no longer interested in becoming co-investors, or operators. Similarly the Shire of Upper Gascoyne does not appear willing to take on the management or co-ownership of the proposed facility. It seems therefore, that if the State Government is to support this project, it will need to be in partnership with a private operator.
- A set of guidelines and conditions for operation need to be developed prior to seeking a co-investor. These conditions may include Indigenous training and employment, DPaW involvement, design parameters to meet target market requirements, etc. to ensure regional development opportunities are maximised.
- Put the opportunity out to tender: It is suggested that the opportunity to co-invest and operate the proposed facility should be put to tender in an effort to contract a co-investor that will be the proponent.

**STRATEGIC ACTIONS**

- Gascoyne Tourism Board to review the URS Business case for Mt Augustus, and if it is supported as a viable project by the Board, encourage the State Government to commit to fund and lead the investment/development process.

**Kennedy Range**

In combination with Mt Augustus, the Kennedy Range represents the main natural visitor attractions for the Gascoyne Junction area. Kennedy Range National Park is managed by DPaW and has basic camping facilities.

A regional priority for DPaW is to establish a new campground at Kennedy Range National Park where demand often exceeds capacity during peak months at the existing Temple Gorge campground. It has also been reported that the Park has experienced increasing interest and visitation since the sealing of the road to Gascoyne Junction, and establishment of visitor facilities at Gascoyne Junction.

Complementing this outlook is the increased scope for future nature based recreation and tourism use on neighbouring pastoral leases that have been purchased by DPaW for conservation and are proposed to be added to these National Parks.

The infrastructure improvements and increasing access to Kennedy Range and areas such as Rocky Pool and Fishy Pool along the Gascoyne River would potentially encourage drive market visitors to stay longer and enhance the overall appeal of the Gascoyne Junction area.

**STRATEGIC ACTIONS**

- In partnership with DPaW, review management plans for the Kennedy Range National Park and explore opportunities to upgrade facilities / amenities and enhance the overall visitor appeal and increase access to key attractions such as Rocky Pool and Fishy Pool.
Cruise Ship Market Expansion

Exmouth is currently unable to fully take advantage of increasing interest of cruise ships stopping over due to the lack of suitable berthing facilities protected from the wind. It is recommended that efforts to address this issue focus on gaining access to the Navy Pier, as the cost and engineering required to build a new facility in the Exmouth Gulf is considered prohibitive.

The Western Australian Cruise Shipping Strategic Plan 2012-2020 (Tourism Western Australia, 2014) has the following stated mission:

To contribute significantly to the economic growth of tourism, and the State, by providing world-class cruise destinations, unique and extraordinary tourism experiences and delivering high value benefits for passengers and local communities.

One of the key areas this strategy focuses on is Port Infrastructure & Policy (Tourism Western Australia, 2014). Exmouth has been identified as an increasingly attractive destination for cruise ships originating ex-South East Asia. Gaining access to suitable existing infrastructure (e.g. Navy Pier) is critical to developing the capacity of Exmouth to service this market.

STRATEGIC ACTIONS

- Establish a suitable berthing facility for Cruise Ships in Exmouth by negotiating an agreement with Dept. of Defence to use the Navy Pier for visiting cruise ships.

Caravan Park Infrastructure

Previous reports and studies have highlighted the need to build the capacity of the region to meet the demands of the caravan and camping sector. Observations from field trips and stakeholder consultation highlighted issues relating to caravan parks across the region operating at full capacity for extended periods during peak season. Supply is largely impacted by long term visitors who are escaping the southern winter which in turn limits accommodation availability for shorter term visitors.

The WA Caravan & Camping Action Plan 2013-2018 highlights the need for new Caravan Park Developments in priority areas. The Action Plan has received funding support of $40.7 million for implementation including funding for the Parks for the People initiative. Parks for the People is also investing into Cape Range National Park and Francois Peron National Park. These are important initiatives that should be strongly supported by industry on the basis that camping and caravanning is having a significant environmental impact where it is not controlled or managed, such as Bush Bay and New Beach south of Carnarvon which have very high levels of use.

The need for new caravan parks in Exmouth, Carnarvon and Coral Bay was identified in the Strategic Approach to Caravan and Camping Tourism in Western Australia (Brighthouse, 2012) report for Tourism WA. Finalisation of the Coral Bay Settlement Plan may result in the release of land for an overflow caravan park for the area, although this is yet to be confirmed.
The Caravan & Camping sector is not necessarily aligned with the market segments identified in the Ningaloo Shark Bay National Landscapes Experience Development Strategy; however it is the cornerstone of tourism in the region. There is no value in duplicating work that is already in progress. It is therefore recommended that industry and stakeholders in the Gascoyne region engage directly with Tourism WA to support and encourage the development of new Caravan Parks in the region where appropriate.

**STRATEGIC ACTIONS**

- Investigate opportunities for the development of overflow, new and bush caravan and parking facilities across the region to cater for the demands of the caravan and camping sector.

  *There is a need to engage and collaborate with Tourism WA to develop 'investment ready' sites - refer WA Caravan & Camping Action Plan 2013-2018.*

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**CORAL BAY RESIDENTIAL HOUSING AND INFRASTRUCTURE**

Coral Bay is in many ways an end destination for many visitors, particularly families, and essentially enjoys year-round visitation. It is understood that the Coral Bay Settlement Plan outlines proposed upgrades to essential infrastructure and services in the settlement (e.g. permanent workers housing, road realignment etc.). Issues such as residential accommodation for tour operators and employees have the potential to hinder industry growth and deter new entrants to the tourism industry in Coral Bay.

Coral Bay is an active tourism destination all year round and is a vitally important part of the tourism appeal of the Gascoyne region. However the capacity of the industry to grow or expand is limited by the lack of suitable residential accommodation for operators and their employees.

The Coral Bay Settlement Plan has been submitted to Government for review. Its adoption and implementation in terms of new residential development, expanded local infrastructure and upgrading of services is integral to growth of the industry in this area and providing tourism operators with the confidence to reinvest in their operations.

**STRATEGIC ACTIONS**

- Facilitate the improvement of local infrastructure for Coral Bay residents.

  *This includes municipal servicing facilities, staff housing, foreshore re-development (and closing of road access to become pedestrian only access, and re-routing of main road to behind the settlement).*

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**WHITLOCK ISLAND**

Whitlock Island in Carnarvon has been suggested as a future site of a higher end tourism accommodation property and golf course within the town. The Island is considered a prime opportunity for revitalising and supporting longer length of stays.
within the town and increasing the standard of accommodation offering for business and leisure travellers. Such a facility could also be a convention facility for supporting and hosting larger regional events. Notwithstanding, the development of other higher standard of accommodation anywhere within Carnarvon town precinct should also be supported if a suitable alternative site is identified and an investment opportunity arises.

**STRATEGIC ACTIONS**

- Explore / investigate the potential to develop new products and experiences on Whitlock Island in Carnarvon.

  *First steps will include undertaking scoping study and quantify infrastructure needs to support delivery of tourism and associated sporting facilities.*

**NEW ENTRANTS**

The tourism industry in the Gascoyne region has seen limited new guided tour products in recent years. Some operators may feel threatened, while others see it as an opportunity to create greater diversity of product and experiences. This issue is also relevant to the National Landscapes program which focuses on the development of products and experiences targeting the International Experience Seeker.

Encouraging new entrants to the industry should be viewed as the opportunity for new partnerships and adding a point of difference to the appeal of the region.

There is currently no clear mechanism to encourage new entrants into the tourism industry in the Gascoyne. Any potential new entrant to the industry would have difficulty in knowing where to start, who to contact, source reliable data or gain an understanding of the scope and scale of opportunities.

Large and small operators should be encouraged to enter the market in the region. More Aboriginal tourism operators and product also would boost the ability to grow the industry, and fill current product and visitor experience gaps.

A cohesive and well-networked industry, that openly shares knowledge and ‘makes it easy’ for new entrants, will encourage new operators to the region. The lack of reliable industry data is a key issue to address at a regional level in an attempt to address basic informational needs of future new entrants.

An important measure of the Gascoyne Industry’s success in achieving the “Growing the Industry” is the expansion or introduction of new tourism operators (i.e. with metrics around employment creation, number of new businesses, and so on).

New entrants play an important role in preventing the current visitor experience appealing, and avoiding the industry becoming ‘stale’.
The concept of encouraging new entrants to the region’s tourism industry is closely aligned to the achievement of Ningaloo Shark Bay National Landscapes themes and hero experiences.

**STRATEGIC ACTIONS**

- Encourage new entrants into the Gascoyne Tourism Industry.

  *Relationships need to be developed with key agencies that can support new or emerging operators. Coupled with this is the need to share information, and collect and collate reliable industry data at a regional level so that sound decisions can be made to align product development with market needs and expectations and to ensure that new entrants are aware of broader strategies for the region, associated key markets, product opportunities and industry priorities (e.g. NSBNL).*
CONTRIBUTE VALUE - STRATEGIC PRIORITIES

- Target higher-yielding market segments by exploring and seeking to attract potential higher-yielding future markets.
- Coordinated and collaborative regional marketing activity through aligned tourism marketing efforts across the region.

HIGHER MARKET YIELDS

The overriding message from Gascoyne tourism industry operators is that the region needs to target higher-yielding visitors going forward. Targeting a higher-yielding market is considered a means through which the ‘value’ of the industry can be increased.

Another clear message obtained through the consultation phase of this project is that the industry is not necessarily seeking mass tourism to drive growth of the industry. Instead, they aspire to ‘value over volume’, targeting higher-yielding visitors that have less impact, thereby retaining and conserving the significant environmental values of the region.

The current profile of visitors to the Gascoyne region is largely self-drive and characterised by ‘Grey Explorers’ and families. On a smaller scale higher-yielding market segments exist through the form of ‘Dedicated Discoverers’ and ‘Experience Seekers’ who are represented by couples, working professionals and international visitors that have different motivations for travel and demographic profile. The ‘Grey Explorers’ remain the cornerstone of annual visitation and should be maintained, not ignored. Their presence each year underpins the regional tourism industry.

The definition of higher-yielding markets doesn’t necessarily include or exclude ‘top-end markets’. Broadly speaking higher-end markets comprise visitors who are likely to be time poor but have a higher household income and therefore greater level of discretionary spending.

Many current visitors are repeat visitors and are unlikely to take the same tour again; It is becoming increasingly challenging for tour operators to grow their businesses or develop new markets with the current composition of visitors. There is a strong will to target the higher-yielding visitor in an effort to attract new / first-time visitors who are more likely to participate in scheduled tours as part of their visit to the region. This emphasises the need to place even more attention on higher yielding ‘Dedicated Discoverer’ and / or ‘Experience Seeker’ markets.

Targeting higher-yielding visitors has implications from a regional marketing perspective, and marketing must also be matched by tailoring the product offering to meet higher-yielding markets. This may include packaging and promotion of products / experiences that are aligned with market needs and linked across the
region (cross regional packaging and promotion) in an attempt to value add. Value-adding needs to be used with more intent and discounting should be avoided.

In terms of the Upper Gascoyne area, efforts should be made to encourage more of the current Grey Explorer and Dedicated Discover markets to include a visit to the Kennedy Range and Mt Augustus attractions, particularly as new facilities very suited to this market are now available at Gascoyne Junction.

**STRATEGIC ACTIONS**

- Explore and identify potential higher-yielding future markets including the ‘Dedicated Discoverers’ and ‘Experience Seekers’ who have a propensity to spend more on tourism activities during their exploration of a region.

  *In order to attract this type of visitor it is imperative to ‘make it an easy choice for them’ by packaging products and experiences that are in common with their needs and expectations. This includes adding value and packaging products that link across the region as a means of providing a unique visitor experience and maximising yields. This approach is closely aligned to the broader objectives of the Ningaloo Shark Bay National Landscapes Experience Development Strategy.*

**RENEWAL & RE-INVENTION**

Feedback from tourism operators and stakeholders in combination with desktop research and observations indicates that a degree of ‘renewal and reinvention’ is required within the regional tourism industry.

Perhaps the most obvious example is Monkey Mia which has historically enjoyed a high profile as part of the State’s tourism visitor experiences. The experience at Monkey Mia has been based on dolphin interaction however this type of experience can now be enjoyed at a range of locations across the State such as the Dolphin Discovery Centre in Bunbury just 200kms from Perth, that includes swimming with the dolphins experiences which is not allowed in Monkey Mia due to the sensitivity of the local dolphin pod to such human impact.

There is no doubting the pristine, natural marine environment of Monkey Mia and the broader Shark Bay area is an attraction in its own right. Monkey Mia still holds somewhat of an iconic status in the State however the visitor experience on offer needs to be ‘changed-up’ and renewed in order to regain a competitive advantage.

Many industry operators and stakeholders believe Dirk Hartog Island is an ‘untapped’ opportunity and provides scope to grow the industry through the development of new / improved tourism and supporting infrastructure.

The visitor experiences available in the broader Shark Bay area also require some level of renewal and / or reinvention, particularly in light of the industry objective to target a higher-yielding visitor. The marine environment of Shark Bay provides
scope to develop products (e.g. Quality / Luxury live-aboard cruising experiences) that link iconic experiences. At present this type of product has not been fully explored.

Importantly, the renewal / reinvention of visitor experiences in Shark Bay needs to target higher-yielding markets on the basis that industry operators report that existing markets are dominated by grey nomads ‘who buy one newspaper and share it amongst a party of ten – they simply don’t spend!’

**Monkey Mia and Shark Bay**

Monkey Mia was one of the first places where human dolphin interaction was possible, and although still offering a unique experience to visitors, the emergence of similar experiences available at other locations in the State, many of which are closer to Perth or other centres of high population, Monkey Mia now has direct product competition.

Monkey Mia and the broader Shark Bay area needs to create additional reasons or motivations for target markets to visit the area. In terms of target markets there is a need to focus on a higher-yielding visitor as a means of encouraging new / unique visitors to the area and maximising yield thereby contributing value and growing the industry.

The ability to grow the tourism industry in the Shark Bay region will not be achieved through existing markets. New and innovative products that utilise the exceptional marine environment provide the greatest opportunity to introduce a renewed / revitalised visitor experience that has appeal to targeted higher-yielding visitors. The Monkey Mia ‘dolphin experience’ will remain a key element of the visitor experience however adding value through innovation and diversity of product offerings are at the heart of regaining a competitive advantage.

A Department of Parks and Wildlife Naturebank site at Francois Peron National Park approximately 10km north of Monkey Mia has apparently been open to Expressions of Interest from investors in the past with little interest. The future development of this site could assist in generating further renewal in the region.

**Dirk Hartog Island**

Dirk Hartog Island is steeped in European explorer history, together with a pristine marine environment and spectacular coastline. The Ningaloo Shark Bay National Landscapes Experience Development Strategy recommends the development of ‘fly-discover’ packages linked to voluntourism. This could be expanded to include the development of land-based experiences that capture the Aboriginal heritage, culture and history and surrounding marine environment, thereby diversifying the experiences available in the area.

It is acknowledged that development along these lines will require close consultation with the Department of Parks and Wildlife and the private operator on Dirk Hartog Island. The need for infrastructure to support improved marine access to the Island has been highlighted as an integral part of developing these experiences, and will enhance the capacity of the industry to extend the length of stay of visitors.
The reference to improved marine access to Dirk Hartog Island also links to Project 6 of the Ningaloo Shark Bay National Landscapes Strategy which focuses on the development of high-quality live-aboard marine experiences, between Exmouth & Shark Bay. These types of product development initiatives can be clearly aligned to a higher-yielding visitor.

**STRATEGIC ACTIONS**

- Renewal and reinvention of products and visitor experiences in Monkey Mia and Shark Bay to reinvigorate the destination as a ‘must see’.
- Explore the potential to develop new products and experiences on Dirk Hartog Island, particularly opportunities to link luxury cruising activities to land based eco and historical adventures.

**TOURISM MARKETING**

There is broad consensus for the need to better co-ordinate tourism marketing efforts in the Gascoyne region. The marketing bodies and associated brands within the region is a complex mix, and include:

- Australia’s Coral Coast (Regional Tourism Organisation)
- Australia’s Golden Outback (Regional Tourism Organisation)
- Tourism Western Australia (State Tourism body)
- Tourism Australia (National Tourism body)
- Visitor Centres (located in Exmouth, Carnarvon and Shark Bay)
- WAITOC (Peak Indigenous tourism body in WA)

There are also individual operators who are marketing their product and trying to draw attention to iconic attractions in the region. Wholesalers are also marketing products and services under their own brands. Adding to this mix is the proposed brand positioning for the Ningaloo – Shark Bay National Landscape project, which also includes the Gascoyne Junction area.

This means there is a series of different messages being conveyed to the visitor and locals who may become confused about exactly what to expect. A key measure of tourism branding and marketing effectiveness is the degree to which campaigns and programs trigger the cognitive senses of the target market. In essence, the aim is to have the target audience imagining themselves at the destination and a clear expectation of what they will see and experience. Achieving effectiveness in this context is difficult without a cohesive marketing effort that is based on consistency of message and brand values.

There is merit in developing agreed, collaborative marketing programs so that market reach and penetration is maximised and the region gains an identity through a set of agreed core brand values.

Across the Gascoyne there is a lack of cooperative marketing campaigns and activities. Feedback from peak tourism marketing bodies indicates that leveraging limited marketing dollars through operator participation in mainstream programs
has been challenging. Marketing funds are being spent separately by all parties instead of pooling of funds for an agreed strategic & tactical marketing program and leveraging the total spend through industry partners (e.g. airlines, wholesalers etc). This situation also limits the ability for the industry to be active within mainstream tourism marketing distribution channels.

The alignment of marketing efforts is entirely focused on maximising the effectiveness of collective marketing activities undertaken across the region, not to mention stretching limited marketing funds as far as possible.

There is no suggestion that a new brand should be developed for the Gascoyne. Specifically, the region needs to leverage strong existing brands that convey and mirror the desired common marketing message. This can be challenging but is achievable.

The key tourism brand that most closely aligns to the attributes and visitor experiences in the Gascoyne region is that of Tourism WA – ‘Experience Extraordinary’. A coordinated effort across the region needs to be made to leverage off the ‘Experience Extraordinary’ brand in terms of its market awareness, market presence, underlying values and core messages. The brand positioning for the Ningaloo Shark Bay National Landscape should also be integrated for the region, providing a more coordinated approach to tourism marketing.

The notion of developing and delivering a series of ‘marketing forums’ across the region is in many ways an educational process that focuses on; how industry can leverage from TWA, RTO and VC initiatives; better understand ‘mainstream’ tourism distribution channels and networks; optimise marketing spend; expand the market reach and penetration for individual operators etc.

This initiative was included as a strategic action because there is very little in the way of Co-operative marketing campaigns across the region.

STRATEGIC ACTIONS

- Align tourism marketing efforts across the region.

*Better coordination of marketing efforts across the region will contribute greater value to the tourism industry. There are many examples of marketing strategies that have achieved success largely by virtue of the fact that they were founded on agreed objectives, brand values and implemented with a collaborative approach. There is strength in numbers!*
Developing Products & Services

Developing Product and Services centres on the importance of product diversity; it also highlights the need for a funded position/role to assist with and support new product development. It recognises that regional scale events are a key tool to drive visitation and issues such as inadequate berthing infrastructure and transport are limitations to attracting the cruise ship market into the future. Developing ongoing product diversity is the key to the Gascoyne region having a continued appeal to core visitor markets, particularly in an increasingly competitive industry environment.

The Gascoyne region has a range of world-class natural tourism assets. The tourism industry in the region has gained recognition through iconic attractions and experiences such as the Ningaloo Coast, Mt Augustus, Kennedy Range, whale sharks, dolphins and other marine-based activities in a relatively remote and pristine natural environment.

The natural tourism assets of the region provide the greatest opportunity to leverage a competitive advantage for the region. Current limitations for the region’s tourism industry relate to:

- Lack of a ‘key driver’ for the development of products, services and events
- Unreliable industry data upon which to make well informed decisions and align new products and services to visitor needs
- A lack of market focus – trying to be all things to all people
- Disparate levels of product quality and delivery

There is a high level of interdependency between this aspect and other strategic areas of focus detailed in this document.
Regional Tourism Development Role

Like many regions across the State the Gascoyne lacks a dedicated regional tourism development role (a Tourism Development Officer, or TDO) that focuses on:

- Establishing a central point of contact for the tourism industry across the region
- Supporting / facilitating industry development, lobbying and representing the region and promoting industry opportunities based on accurate data
- Providing support to existing operators or new entrants in terms of linking them with industry stakeholders and networks, diversity and / or innovation of products and services, and continuous improvement
- Driver and facilitator of regional strategy implementation

Currently, tourism operators and stakeholders carry out tourism development functions independently across the region. There is a missed opportunity as a single focus could produce greater regional benefits through a more collaborative and coordinated approach.

Whilst the tourism industry in the Gascoyne is acknowledged by Government as a key economic driver of the region, the public sector agencies in the region do not have the depth of tourism industry knowledge or experience required to facilitate industry growth.

This Regional Tourism Strategy is reliant on human and financial resources being available to implement strategic actions, and the implementation of the Ningaloo Shark Bay National Landscapes Experience Development Strategy will also require dedicated resources.

The role title is still to be agreed by stakeholders, but has been referred to in this document as a Tourism Development Officer (TDO). The position could sit under an incorporated Gascoyne Tourism Board, or perhaps become a public sector position that is guided by the Gascoyne Tourism Board as a reference group.

Strategic Actions

- To create a Regional Tourism Development Officer role that focuses on supporting and facilitating industry engagement and product development.

The ongoing development of tourism products and services through industry collaboration and coordination is dependent on having a dedicated industry resource who is a 'Tourism Expert'.
Regional Events

The State Government Strategy for Tourism in Western Australia 2020 highlights an increasing focus on the development of new events to provide added attractions and encourage visitor dispersal across the State.

The Gascoyne region has a series of current annual events including Gascoyne in May, the Gascoyne Food Festival, Whale Shark Festival, Gascoyne Dash, Gamex and others. The continued growth and development of these collaborative events represents an important regional focus.

In addition to improving and building on existing events, the development of new, unique events also represents an opportunity for the region to maintain visitor appeal and enhance the visitor experience into the future. There is a need to ensure that regional events are coordinated across the region, so they are not competing against each other.

The development of meetings and conferences in the region should also be a focus going forward. Although facilities are limited, the region does have capacity in Exmouth (Novotel), and the soon to be built Ningaloo Centre and Carnarvon (Gwoonwardu Mia, One Mile Jetty and new Museum facility) to accommodate small – medium events. In this context, targeting the incentive market is encouraged on the basis that ‘business can be mixed with leisure’. Examples that link local features may include Astronomy conventions (linked to the Space Museum), a World Heritage linked environmental management or marine science conference, etc.

It is widely acknowledged across the tourism industry that ‘business tourism’ generally draws a higher-spending visitor, and these are also referred to as ‘super-tourists’. The objective of targeting the Meeting & Incentive market is to leverage pre and post touring opportunities as part of the overall itinerary. This capitalises on the ‘mixing business with pleasure’ concept. Importantly, the concept of focusing on pre and post touring options does not imply that a meeting or convention needs to be held in the region. For example, the Perth Convention Bureau may host an environmental conference in Perth but the most appropriate pre/post touring options could be along the Ningaloo Coast or in World Heritage listed areas, depending on the subject matter. The scale of these opportunities needs to be fully explored.

The development of new events in the region should focus on iconic attractions, experiences and look to make use of prevailing environmental conditions such as wind, climate, water and remote outback settings. For example, ideas might include a festival of the wind (kite fighting, yacht racing etc), an Aboriginal Cultural Festival etc.

The ability to create new events in the region is somewhat restricted by the reliance on volunteer support. This is a common issue for regional locations and to overcome this, support for event development could be incorporated into the proposed Regional Tourism Development Role mentioned previously.
STRATEGIC ACTIONS

- Continue to grow and improve existing regional events through partnerships, regional collaboration and support for volunteer committees.
- Scope opportunities for the development of new and unique events based on tourism icons and prevailing climatic conditions.

*Regional events represent an opportunity to add to the visitor appeal of destinations. They provide scope not only to attract visitors but to also extend their length of stay.*

Existing events that can continue to be supported and grown include (by locality):

**Shark Bay**
- Shark Bay Winter Festival
- Shark Bay Fishing Fiesta
- Gascoyne in May

**Carnarvon**
- Gascoyne Food Festival
- Gascoyne in May
- Gascoyne Dash

**Gascoyne Junction**
- Gascoyne Dash
- Gascoyne in May
- Junction Races

**Exmouth**
- Whaleshark festival
- GAMEX
**CAPACITY BUILD – STRATEGIC PRIORITIES**

*Maximise the economic returns from cruise ship market.*

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**Cruise Ships**

As outlined earlier in this document [pg 48] locations such as Exmouth are becoming increasingly popular with the cruise market ex-South East Asia. This is driven by its geographic location in terms of distance between ports and visitor appeal of the area.

The major hurdles for establishing the cruise industry in Exmouth are the current berthing facilities which are unsuitable in adverse weather conditions.

Difficulties in meeting the needs of the cruise ship market, a lack of coordination with regard to facilities and services, and a somewhat lethargic local attitude towards this market, is hindering the ability to capitalise on opportunities.

In order to derive maximum benefit from the cruise ship market there must be well organised and seamless tours, shore excursions and transport for visitors. At present there are known issues relating to lack of land-based transport and the availability of year-round tour product for cruise passengers. Cruise ships will schedule visits throughout the year, so year-round products are essential. This should be a focus for Exmouth but is dependent on local leadership and collaboration between the tourism industry and small business sector.

It is not just tour operators who stand to benefit from cruise ships coming into port but also the broader small business sector. Cruise ship passengers represent potential future visitors to the wider region.

Maximising opportunities will be dependent on the local tourism industry and retail sector conveying a clear message that they are focussed on meeting the needs of cruise ship passengers. For this reason it is recommended that information / educational sessions are held with local tour operators and the small business sector to ensure a clear understanding of passenger needs. This type of initiative has already been delivered by Tourism WA across all ten ports in the State. Future initiatives may also involve Exmouth Visitor Centre and Exmouth Chamber of Commerce.

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**STRATEGIC ACTIONS**

- Deliver industry workshop to demonstrate the benefits of the cruise ship market.
- Re-establish/re-invigorate a Cruise Ship Committee in Exmouth.
- Develop products and services to meet the on-shore needs of the cruise ship market in Exmouth.
**CONTRIBUTE VALUE - STRATEGIC PRIORITIES**

- **To provide the industry with the resources, tools and impetus to optimise product / service delivery standards.**
- **Maintain a regional focus on key target markets (including higher-end) and empower the region’s tourism industry to meet the needs & expectations of target markets through better understanding of the needs of target markets.**

**INDUSTRY DATA & INFORMATION**

There are significant limitations with current tourism industry data. The primary source of available industry data is published through Tourism WA. As evidenced below, the sample size is less than 1% of total estimated annual visitors to the region. The confidence levels used make the results unreliable and difficult for tour operators, investors or potential new entrants to make informed decisions about future developments with any level of confidence.

**GASCOYNE DEVELOPMENT COMMISSION AREA VISITOR SAMPLE SIZE BASED ON TOURISM RESEARCH AUSTRALIA’S NATIONAL AND INTERNATIONAL VISITOR SURVEYS**
(Source: Tourism Western Australia Fact Sheets, 2013)

<table>
<thead>
<tr>
<th>YE Dec 2010/11/12</th>
<th>Sample Size</th>
<th>95% Confidence Intervals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Visitors</td>
<td>Visitor Nights</td>
</tr>
<tr>
<td>Intrastate Visitors</td>
<td>336</td>
<td>± 19.7% ± 20.9%</td>
</tr>
<tr>
<td>Interstate Visitors</td>
<td>58</td>
<td>± 37.9% ± 45.5%</td>
</tr>
<tr>
<td>International Visitors</td>
<td>1296</td>
<td>± 12.6% ± 40.4%</td>
</tr>
</tbody>
</table>

*Note: Estimates in this fact sheet need to be considered within the Confidence intervals in this table*

The need for up-to-date reliable market research data is obviously critical to the region’s ability to fully understand the profile of current visitor markets or identify gaps in products and services. In addition it is important that reliable and consistent methods of reporting statistics and data needs to be negotiated with State Government agencies such as Department for Regional Development so that comparisons and performance can be accurately measured.

The development and implementation of an annual regional visitor research program is pivotal to building the capacity of the industry. A key strategic focus for the industry is to encourage new entrants, expand and diversify existing products and be innovative. In order to provide the platform for these types of initiatives the current visitor profile, market opportunities and gaps must be identified and understood. A sound regional visitor research data collection program will help to achieve this outcome. It may be necessary to seek some funding for a part time position (possibly within GDC), or to contract the research to consultants as an annual contract.
STRATEGIC ACTIONS

- Develop and seek funding for an annual regional visitor research program to establish regional industry sourced baseline data, and ongoing monitoring and measurement of key data.

Poor information leads to poor decisions and potential investor uncertainty. A plan needs to be developed by the new Tourism Officer to determine what information will be collected, who will collect it and who will analyse it.

PRODUCT DELIVERY

The Gascoyne region has a range of visitor experiences that extend from the pristine coastline and marine environment to the outback. However, the standard of product delivery varies across the region.

The variation seen in standards of product delivery represents a threat to the industry in terms of the broader industry reputation and the ability to align a globally recognised natural environment with world class visitor experiences.

The uptake of various accreditation programs will help to meet mainstream industry standards but this should be taken one step further by establishing industry benchmarks that exceed visitor expectations. The ultimate aim will be to ‘convert visitors to future ambassadors’ for the region’s tourism industry and is made in light on the emerging trend for visitors to use online mechanisms such as ‘Trip Advisor’ to share their experiences. Social media and digital platforms are becoming increasingly used as a means of sharing information. People are not only sharing experiences with close contacts, but also with the world.

Visitor feeling toward a product or service can be centred on an experience or attribute, be that physical or emotional. However, the manner in which the product or service is delivered is arguably the most influential factor as far as the overall visitor experience is concerned. The biggest and best boat in the region could be spectacular but if the product delivery or service is below expectation, the visitor will remember the poor service, and convey this to their friends and relatives.

It is perhaps unrealistic to think that all industry operators and service providers will achieve a uniform high level of quality product / service delivery. Improvements can be realistically achieved in this field through the development, implementation and monitoring of an agreed ‘code’ by industry peers.

STRATEGIC ACTIONS

- Develop a set of agreed product and service delivery values and adopt as an industry “code”.
- Convert visitors into advocates for the region.
- Celebrate and acknowledge high achievers.
**Market Focused**

The industry objective to target higher-yielding markets will contribute to the value of the industry by increasing visitor spend and ultimately yield for operators.

As noted in the previous section, the development and implementation of a visitor research program will help to identify opportunities and / or gaps in products and services in relations to market needs and expectations. Good understanding of market needs will provide the opportunity for the Gascoyne tourism industry to create a distinct point of difference in the future development and enhancement of products and services.

Market research findings may well present a range of opportunities across different market segments. Keeping abreast of research findings and using them to align the development of products and services with the needs of target segments will mean the industry can become increasingly ‘market focused’.

The local industry has indicated they are not seeking ‘mass tourism’. This is based on a desire to protect and maintain the unique natural tourism assets. This aligns directly with the Ningaloo-Shark Bay National Landscape Experience Development Strategy and complements the two World Heritage areas within the region.

The expansion of Aboriginal tourism experiences across the region is of high priority, and is based on the knowledge that this type of product is sought after by the ‘Dedicated Discoverer’ and / or “Experience Seeker”.

**Strategic Actions**

- Develop a greater understanding of target market needs in order to align products and services.

**New & Renewed Local Product Opportunities**

There are a number of local level tourism product or product planning opportunities that have been identified through the consultation phases of this project. These are presented below by locality. All of these products have an ability to generate increased diversity of product and will contribute to the value of tourism and visitor experience. Some of these projects are underway and others may require some level of support from the Regional Tourism Development Officer in their initial investigation/feasibility and to facilitate making them ‘investor ready’.

**Carnarvon**

- Gascoyne Food Focus – re-new, rejuvenate and promote, encourage local participation. This focus may be supported by Tourism WA who is also developing a Food Tourism Strategy. Indirect benefit from food related tourism in the Gascoyne includes the value generated through the Backpacker market. During peak horticulture, pastoral and fishing seasons the backpacker market
make a very substantial contribution to the region and often leave as
ambassadors for the region.

- One Mile Jetty restoration and development.
- Development of the “Hot Springs”.
- Gwoonwardu Mia - renew and rejuvenate, Arts Centre Development &
cultural trails.
- Redevelopment of OTC Site/Museum.
- Develop & promote local history trails e.g.:
  - HMAS Sydney II;
  - Historical sites;
  - Honouring the 100 year Gallipoli anniversary.
- Whitlock Island development including multipurpose sporting facility, golf
course, tennis and bowling green.
- Encourage new accommodation investment, particularly high-end.

Coral Bay

- Baiyungu Track development.

Exmouth

- New commercial caravan park - Truscott Crescent.
- Improved and new campground facilities and day visit infrastructure within
  Cape Range National Park.
- Development of a Trail Master plan for the Ningaloo region.
- Vlamingh Head lighthouse to be made accessible for tours.
- Exmouth Race Course.
- Encourage new hotel/resort investment in Exmouth.
- Development of the Ningaloo Centre with visitor centre, interpretive
  information, local history and research facility.
- Development youth activity infrastructure and places.

Shark Bay

- Development of the aquaculture and associated tourism activity precinct on
  land vested for that purpose just north of Monkey Mia.
- Eco tourism ventures- including with an Indigenous component.
- Marketing and promotion of a HMAS Sydney II Trail.
- Dirk Hartog Island National Park - improved access, product development &
  eco-tourism opportunities.
- Development of nocturnal fauna tours – Francois Peron National Park.
- Expand bush camping experiences throughout Shark Bay area.
- Tourism development on ‘Potters Block’ in Denham.

Gascoyne Junction

- Kennedy Range Loop Road and visitor facilities.
- River Walk Trails.
Whilst this Strategy does not provide implementation plans for the above projects, there would be strategic support for their development through the role of the Regional Tourism Development Officer.
**Implementation Plan Summary**

The following strategic actions are grouped on the basis of urgency for implementation, with most of the strategic actions to be implemented over the next five years.

### 2014-15 (Immediate)

<table>
<thead>
<tr>
<th>Working Group, Key Agency or Role</th>
<th>Strategic priority</th>
<th>Strategic Action/Tactic</th>
<th>Partners</th>
<th>Leverages &amp; Influencers</th>
<th>Possible Funding Source</th>
</tr>
</thead>
</table>
| Gascoyne Development Commission | To build industry cohesion, collaboration and advocacy across the Gascoyne region, and to oversee the implementation of the Tourism Strategy. | - Create a Regional Tourism Board that is industry led and driven. Develop and document roles and responsibilities (Charter) for the GTB (limited numbers). Identify the skills, expertise and industry knowledge required by Board Members.  
- Board (Gascoyne Tourism Board- GTB) then establishes Working Groups and recruits (possibly in conjunction with GDC), the Tourism Development role (TDO) to drive implementation actions. | Industry | GDC, RDA, LGA’s | Existing Internal resources |
<p>| Aviation Working Group | To improve access to, through and within the region. | - Develop a business case (solution-based approach) to optimise air access to and within the Gascoyne region – i.e. consider aircraft types, schedules, seasonality etc. Lobby on behalf of region to airlines. | TWA, LGA’s, airlines. | TWA, GDC | Utilise existing resources |
| Tourism Excellence Working Group | Raise awareness about the ‘value of tourism’ and the importance of positive visitor experiences. | - Develop a coordinated approach to visitor data collection and implement annual research program. Seek funding for resources to undertake this work. Publish and distribute research findings. | VCs, CCI’s, TWA | GTB, GDC | Royalties for Regions, RDA programs |
|                                      | To build industry cohesion, collaboration and advocacy across the Gascoyne region. | - Develop and implement a regional campaign to increase advocacy for the tourism industry through collectively designing a campaign and key messages for operators, small business sector and resident population. | GTB, VCs, GDC, LGAs, CCI’s | GDC, CCI’s, SBDC | Use existing internal resources |</p>
<table>
<thead>
<tr>
<th>Cruise Ship Committee</th>
<th>Develop priority tourism infrastructure to support the industry, attract new investment.</th>
<th>Establish access to a berthing facility for Cruise Ships in Exmouth by negotiating an agreement with Dept. of Defence to use the Navy Pier for visiting cruise ships.</th>
<th>Shire of Exmouth, GTB, Exmouth Visitor Centre, Exmouth CCI, TWA Cruise ship committee. Dept Defence.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Maximise the economic returns from the cruise ship market.</td>
<td>Develop and coordinate appropriate means of on-shore transport to meet cruise ship demand (this includes 1. coordinating welcoming arrivals –maximising economic and social benefits; and 2. Developing innovative shore excursions to meet expectations of different cruise brands).</td>
<td>EVC, TWA</td>
</tr>
<tr>
<td>Marketing &amp; Events Working Group</td>
<td>Coordinated and collaborative regional marketing activity through aligned tourism marketing efforts across the region.</td>
<td>Develop a tourism marketing forum with key stakeholders that can be delivered to operators and stakeholders across the region.</td>
<td>NL, ACC, AGO, VCs, TDO</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gain industry agreement across the region on core values to be used in all marketing activity in order to convey a consistent message.</td>
<td>Tourism WA</td>
</tr>
<tr>
<td>Tourism Development Officer/Role</td>
<td>Support the industry to align its offering to meet and exceed the expectations of a higher yielding market.</td>
<td>Human, financial and technical resources sourced to support industry across the region to respond proactively to changing market expectations, to integrate the themes of the National Landscapes Program and to deliver outstanding visitor servicing.</td>
<td>VCs, SBC, DIT</td>
</tr>
<tr>
<td></td>
<td>Encourage new entrants to the Gascoyne tourism industry.</td>
<td>Adopt a tourism product development focus across the region through improved networks and a clear message that the region is ‘open for business’.</td>
<td>GDC, LGAs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>n/a</td>
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</tbody>
</table>

KPP Business Development
<table>
<thead>
<tr>
<th>Working Group or Key Agency</th>
<th>Strategic priority</th>
<th>Strategic Action/Tactic</th>
<th>Partners</th>
<th>Leverages &amp; Influencers</th>
<th>Possible Funding Source</th>
</tr>
</thead>
</table>
| Gascoyne Tourism Board     | Development of strong and productive investor relations that encourages, facilitates and supports new investment in the Gascoyne Tourism Industry. | - Quantify and promote investment opportunities and attraction of investment at all levels of the industry by developing a regional Tourism Investment Prospectus for the Gascoyne.  
- Support and provide impetus for land assembly processes to be undertaken for key tourism development sites across the region (Mt Augustus, Whitlock Is, Coastal Tourism Nodes, Coral Bay, Dirk Hartog Is, Caravan Pk sites etc).  
- Review Mt Augustus Business Case, and if supported by the Board as a viable project, encourage the State Government to commit to fund and lead the investment process/development. | GDC, TWA, LGAs, DPaW  
GDC, LGAs,  
DPaW, TWA, Dept. Lands, LandCorp  
GDC, DPaW, Shire of Upper Gascoyne | GDC, TWA, RDA  
GDC, TWA, DPaW | Possibly RDA linked funding program  
Royalties for Regions |
| Tourism Excellence Working Group | Maintain focus on target markets, empower the industry to meet needs of target markets through better understanding of what the target market needs.  
Increase quality, consistency, depth, coverage and management of regional online information sources. | - Design and deliver industry forums across the region that informs/educates the industry about target market visitor profiles, geographic location and other key characteristics.  
- Develop and coordinate region-wide online communications training and development program for industry operators and tourism stakeholders. | TDO, ACC, AGO, VCs, TCWA (Tourism Boost)  
GTB, VCs, DIT | TWA  
GDC | Existing internal resources. |
| Cruise Ship Committee      | Maximise the economic returns from the Cruise Ship Market. | - Develop and deliver an industry workshop to demonstrate the benefits of the cruise ship market.  
- Partner with Exmouth VC and CCI to raise awareness of cruise ship schedule and resulting opportunities for operators and retailers.  
- Develop a pool of local volunteers for ‘meet and greet’ and guiding of cruise ship visitors. | TWA, TDO, ECCI, EVC, DIT | | Existing internal resources. |
| **Marketing & Events Working Group** | Coordinated and collaborative regional marketing activity through aligned tourism marketing efforts across the region. | - Develop a tourism marketing forum with key stakeholders that can be delivered to operators and stakeholders across the region.  
- Gain industry agreement across the region on core values to be used in all marketing activity in order to convey a consistent message. | TDO, NL, ACC, AGO, VCs, TWA | n/a |
| --- | --- | --- | --- | --- |
| **Tourism Development Officer** | Develop and improve visitor information quality and standards across all levels of the industry. | - Implement regional training program to raise industry and stakeholder awareness in better use of interpretative information across all forms of visitor servicing (signs, marketing materials, tour content etc). Develop series of ‘how to’ guides for interpretation as part of a broader online Industry support resources for new and existing operators.  
- Develop mechanisms to share information about target markets. | VCs, NL, TCWA (Customer Way), DIT, VCs, ACC, AGO, NL TWA | n/a |
| **Shire of Carnarvon** | Development of priority tourism infrastructure to support the industry and attract new investment, meets the needs of higher yielding visitors and meets current market demand. | - Facilitate the improvement of local infrastructure for Coral Bay residents/tourism workers through fast-tracking proposed recommendations within the Coral Bay Settlement Plan. | GDC, GTB, Coral Bay Progress Assn., Coastal Towns & Settlement Cabinet Subcommittee. TWA | Royalties for Regions |
| **Cultural Connections Working Group** | Develop scope, scale, diversity and interpretation of Aboriginal culture and cultural product across the region. | - Support, promote, facilitate industry participation and encourage new Aboriginal Tourism Product Development through current Aboriginal Tourism Development Program (ATDP). | TDO, TWA (ATDP), DIT, WAITOC WAITOC | Already funded through Royalties for Regions |

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*It is understood that the TQual Program is currently under review and will be re-released possibly in a different form.*

KPP Business Development
<table>
<thead>
<tr>
<th>Working Group or Key Agency</th>
<th>Strategic priority</th>
<th>Strategic Action/Tactic</th>
<th>Partners</th>
<th>Leverages &amp; Influencers</th>
<th>Possible Funding Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gascoyne Tourism Board</td>
<td>Develop priority infrastructure projects to support the industry attract new investment, meet the needs of higher yielding markets, and meet current market demand.</td>
<td>- Facilitate and promote the development of coastal tourism nodes along the Ningaloo Coast, as identified in the WAPC’s Ningaloo Land Use Strategy.</td>
<td>TDO, TWA, WAPC, DPaW, LGA’s, DoL.</td>
<td>TWA, GDC</td>
<td>n/a</td>
</tr>
</tbody>
</table>
| Tourism Excellence Working Group | Raise awareness about the value of tourism and importance of positive visitor experiences. | - Undertake ‘visitor friendly’ service training program for direct tourism and indirect tourism customer service staff across the region and promote value of tourism message.  
- Undertake a regional training program and provide tools for individuals and the region to manage visitor feedback and promote the region/individual products. | TDO, VCs, industry, DIT | GDC | Tourism Grants / Programs (TQual) |
| Shires | Support the industry to align its offering to meet and exceed the expectations of a higher yielding market. | - Improve the standards of local amenities across the region to match expectations of higher yield market through targeted amenity based infrastructure enhancements as per Appendix II. | GTB | GDC | Royalties for Regions |
| Cruise Ship Committee | Maximise the economic returns from the Cruise Ship Market | - Promote investment in the development of new product, or improve existing tourism product to meet the on-shore needs of the cruise ship market, such as encouraging operators to provide year round products and shore excursions. | Exmouth VC, TDO, Exmouth CCI. | LGA, TWA | n/a |
| Marketing & Events Working Group | Grow existing regional events and develop new, innovative events that are unique to the Gascoyne region. | - Continue to support and build upon existing regional events such as the Gascoyne Dash and Gamex, and emerging tourism focussed festivals such as Gascoyne in May, and others.  
- Scope opportunities for the development of new, unique events based on tourism icons and prevailing climatic conditions. Conduct event development workshops across the region.  
- Establish strong networks with key agencies such as Eventscorp, Perth Convention Bureau, key meeting and incentive planners (Destination and Management Companies).  
- Identify opportunities for relevant meetings, conventions, incentives in the Gascoyne region, in addition to targeting pre and post touring opportunities. | TDO, Events-Corp, GTB | TWA, RTO’s | Events Corp |
<table>
<thead>
<tr>
<th>Tourism Development Officer</th>
<th>Maintain a regional focus on attracting target markets and their specific needs/experiences.</th>
<th>Encourage cross-promotion and packaging of higher-end products across the region – connect and foster collaboration between similar product providers. Link iconic attractions across the region.</th>
<th>GTB, Industry, VCs</th>
<th>TWA</th>
<th>Existing internal resources.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Coordinated and collaborative marketing activity.</td>
<td>- Use cross promotion focus to ‘sell the region’ and hold visitors longer.</td>
<td>GTB, Industry, VC’s</td>
<td>TWA</td>
<td></td>
</tr>
<tr>
<td>Shire of Carnarvon</td>
<td>Development of priority tourism infrastructure to support the industry and attract new investment, meets the needs of higher yielding visitors and meets current market demand.</td>
<td>- Explore / investigate the potential to develop new products and experiences on Whitlock Island in Carnarvon. First steps will include undertaking a scoping study and quantify infrastructure needs to support delivery.</td>
<td>TDO, GTB, GDC, RDA</td>
<td>Royalties for Regions</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- In addition to local promotion of related opportunities, findings could also be incorporated into the Regional Tourism Investment Prospectus.</td>
<td></td>
<td>TWA</td>
<td>DPaW</td>
</tr>
<tr>
<td>DPaW/Shire of Upper Gascoyne</td>
<td>Development of priority tourism infrastructure to support the industry and attract new investment, meets the needs of higher yielding visitors and meets current market demand.</td>
<td>- In partnership with DPaW, review management plans for the Kennedy Range National Park and explore opportunities to upgrade facilities / amenities and enhance the overall visitor appeal and increase access to key attractions such as Rocky Pool and Fishy Pool.</td>
<td>DPaW, Shire, TDO</td>
<td>TWA</td>
<td>DPaW</td>
</tr>
<tr>
<td>Tourism Development Officer/DPaW</td>
<td>Target higher yielding market segments.</td>
<td>Investigate renewal/reinvention of visitor experiences and product offer at Monkey Mia and Shark Bay.</td>
<td>DPaW, TWA, LGA’s Aspen, Shark Bay Tourism &amp; Business Assn.</td>
<td>TWA</td>
<td></td>
</tr>
<tr>
<td>Cultural Connections Working Group</td>
<td>Develop scope, scale, diversity and interpretation of Aboriginal culture and cultural product across the region.</td>
<td>Develop Baiyungu Track as a catalyst project identified in the National Landscapes Program.</td>
<td>NL, TDO, GTB, DPaW, ATDP.</td>
<td>GDC, TWA, WAITOC</td>
<td>Royalties for Regions.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Encourage and support Baiyungu Aboriginal Corporation to develop a four star accommodation property on Lot 500, Coral Bay.</td>
<td>TDO, GTB</td>
<td>TWA</td>
<td>(investment attraction)</td>
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</table>
## 2017-18 (Medium Term)

<table>
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<tr>
<th>Working Group or Key Agency</th>
<th>Strategic priority</th>
<th>Strategic Action/Tactic</th>
<th>Partners</th>
<th>Leverages &amp; Influencers</th>
<th>Possible Funding Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gascoyne Tourism Board</td>
<td>Improved access to, through and within the region.</td>
<td>- Target specific initiatives what will enhance visitor flows to and within the region, including advocacy and support for improving road access between Gnaraloo and Coral Bay.</td>
<td>GDC, LGAs, MRD, DoT, WAPC, Gnaraloo and Warroora Stations.</td>
<td>GDC</td>
<td>Royalties for Regions and Federal tourism program.</td>
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<tr>
<td>Inland Pathways Working Group</td>
<td>Improve access to, through and within the Gascoyne region.</td>
<td>- Quantify and promote the economic benefits and feasibility study for improving road access between Gascoyne Junction and Paraburdoo.</td>
<td>Main Roads, WAPC, Shires, Dept Transport.</td>
<td>GDC, RDA, AGO, TWA</td>
<td>Tourism Grants / Programs (TQual)</td>
</tr>
<tr>
<td>Marketing &amp; Events Working Group</td>
<td>Develop new, innovative events that are unique to the Gascoyne.</td>
<td>- Explore opportunities to attract Meeting and Incentive market, utilising existing facilities and pre/post touring.</td>
<td>TDO, regional venues, industry</td>
<td>Events Corp, TWA, GDC, LGAs</td>
<td>Existing Internal Resources</td>
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<tr>
<td>Tourism Development Officer</td>
<td>Encourage new entrants to the Gascoyne tourism industry.</td>
<td>- Develop and distribute/share industry information and knowledge to attract new operators.</td>
<td>GTB, VCs</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Tourism Development Officer/Shire of Shark Bay</td>
<td>Development of priority tourism infrastructure to support the industry and attract new investment, meets the needs of higher yielding visitors and meets current market demand.</td>
<td>- Explore / investigate the potential to develop new products and experiences on Dirk Hartog Island, by undertaking scoping study and quantify infrastructure needs to support delivery - incorporate findings into Regional Tourism Investment Prospectus.</td>
<td>TDO, GTB, NL, VC</td>
<td>TWA, GDC</td>
<td>Royalties for Regions</td>
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</table>
### 2018-19 (Medium Term)

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<th>Strategic Action/Tactic</th>
<th>Partners</th>
<th>Leverages &amp; Influencers</th>
<th>Possible Funding Source</th>
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</thead>
<tbody>
<tr>
<td><strong>Tourism Excellence Working Group</strong></td>
<td>To provide the industry with the resources, tools and impetus to optimise product/service delivery standards. Increase quality, depth, coverage and management of regional online information sources.</td>
<td>- Develop a regional “service excellence awards” program to celebrate and acknowledge high achievers.</td>
<td>GTB, VCs, TDO, SBDC</td>
<td>GDC</td>
<td>GDC, Tourism Grants / Programs (TQual)</td>
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<tr>
<td></td>
<td></td>
<td>- Improved content and linkages between Gascoyne destination web pages and information portals, including resourcing a part time role to manage negative destination feedback and provide regular updates on Trip Advisor etc. in addition to developing communications for customer bases of TWA and RTOs.</td>
<td>TDO, GTB, VCs, NL</td>
<td>GDC</td>
<td>Tourism Grants / Programs (TQual)</td>
</tr>
<tr>
<td><strong>Marketing &amp; Events Working Group</strong></td>
<td>Develop new, innovative events that are unique to the Gascoyne.</td>
<td>- Scope opportunities for the development of new, unique events based on tourism icons and prevailing climatic conditions. Conduct event development workshops across the region.</td>
<td>TDO, EventsCorp</td>
<td>EventsCorp</td>
<td>Tourism Grants / Programs (TQual)</td>
</tr>
<tr>
<td><strong>Gascoyne Tourism Board</strong></td>
<td>Development of priority tourism infrastructure to support the industry and attract new investment, meets the needs of higher yielding visitors and meets current market demand.</td>
<td>- Advocate and facilitate the land assembly processes for new priority caravan parks in the region by engaging and collaborating with TWA to develop “investor ready” sites (refer to WA Caravan and Camping Action Plan 2013-2018).</td>
<td>TWA, LGAs</td>
<td>GDC, TWA</td>
<td>TWA (Caravan &amp; Camping Action Plan)</td>
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## 2020-onwards (Longer Term Aspirational Projects)

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<tr>
<th>Working Group or Key Agency</th>
<th>Strategic priority</th>
<th>Strategic Action/Tactic</th>
<th>Partners</th>
<th>Leverages &amp; Influencers</th>
<th>Possible Funding Source</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tourism Excellence Working Group</strong></td>
<td>To provide the industry with the resources, tools and impetus to optimise product /service delivery standards.</td>
<td>Develop a set of agreed product/service delivery values and adopt as and industry ‘code’. Collaborate with all levels of industry in the development, promotion and rollout. Incorporate and embed the code into membership terms and conditions.</td>
<td>VCs, Industry</td>
<td>GTB, TWA</td>
<td>n/a</td>
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<tr>
<td><strong>Tourism Excellence Working Group</strong></td>
<td>Improved regional collaboration and service standards within the Gascoyne.</td>
<td>Visitor Centres- looking to collaborate to become “Centres of Tourism Excellence” focussed on continuous improvement and formalisation of service standards across each centre. Visitor Centres coordinating the training of staff, undertaking regional training and exchange programs.</td>
<td>VCs, DIT</td>
<td>TWA, VCAWA</td>
<td>Tourism Grants / Programs (TQual)</td>
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<tr>
<td><strong>Cultural Connections Working Group</strong></td>
<td>Develop scope, scale, diversity and interpretation of Aboriginal culture and cultural product across the region.</td>
<td>Develop a Regional Cultural Trail consisting of interpretive material, a digital app, product and themes linked to the Gwoonwardu Mia Culture Centre as the centrepiece. Explore and develop relevant training opportunities in partnership with Durack Institute of Technology.</td>
<td>Gwoonwardu Mia, TDO, GDC, VCs, NL, DIT</td>
<td>WAITOC, TWA</td>
<td>Existing TWA Indig. Product Dev. Funding Program</td>
</tr>
</tbody>
</table>
REFERENCES


Western Australian Indigenous Tourism Organisations Council, *WAITOC Holiday Planner*, WAITOC.
## Stakeholder Consultation List

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation / Operator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kim Pervan</td>
<td>Gascoyne Development Commission</td>
</tr>
<tr>
<td>Steven Webber</td>
<td>Gascoyne Development Commission</td>
</tr>
<tr>
<td>Toni Hibbert</td>
<td>Gascoyne Development Commission</td>
</tr>
<tr>
<td>Karen Thompson</td>
<td>Gascoyne Development Commission</td>
</tr>
<tr>
<td>Roje Kemp</td>
<td>Shire of Exmouth</td>
</tr>
<tr>
<td>Kristy Bryan-Smith</td>
<td>Exmouth Visitor Centre</td>
</tr>
<tr>
<td>Darren Cossill</td>
<td>Novotel Ningaloo</td>
</tr>
<tr>
<td>Jacki Brooks</td>
<td>Ningaloo Lodge &amp; Exmouth CCI</td>
</tr>
<tr>
<td>Peter McKissock</td>
<td>Ningaloo Blue</td>
</tr>
<tr>
<td>Paul McFetridge</td>
<td>Coral Bay Ningaloo Reef Resort</td>
</tr>
<tr>
<td>Frazer McGregor</td>
<td>Coral Bay Progress Association</td>
</tr>
<tr>
<td>Karen Leay</td>
<td>Coastal Adventure Tours</td>
</tr>
<tr>
<td>Karen Irwin</td>
<td>Ningaloo Club</td>
</tr>
<tr>
<td>Simon Moore</td>
<td>Wintersun Caravan Park/Carnarvon Chamber of Commerce and Industry/Carnarvon Tourism Alliance</td>
</tr>
<tr>
<td>Sharon Williams</td>
<td>Carnarvon Visitor Centre</td>
</tr>
<tr>
<td>Paul Baron</td>
<td>Baiyungu Aboriginal Corporation</td>
</tr>
<tr>
<td>Dirk Sellenger</td>
<td>Shire of Upper Gascoyne</td>
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<tr>
<td>Don Hammarquist</td>
<td>Mt Augustus Station/Shire of Upper Gascoyne</td>
</tr>
<tr>
<td>Sarah Meecham</td>
<td>Quobba Station</td>
</tr>
<tr>
<td>Nicole Dahlke</td>
<td>Coral Coast Caravan Park</td>
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<tr>
<td>Sue Graham</td>
<td>Interpretive Centre</td>
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<tr>
<td>Cath Roberts</td>
<td>Monkey Mia Discovery Centre, Dept. Parks and Wildlife</td>
</tr>
<tr>
<td>Martin Greenside</td>
<td>Monkey Mia Dolphin Resort</td>
</tr>
<tr>
<td>Sue Hancock</td>
<td>Dept Parks &amp; Wildlife - Denham</td>
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<tr>
<td>Merome Beard</td>
<td>Carnarvon Tourism Alliance</td>
</tr>
<tr>
<td>Paul Kelly</td>
<td>Carnarvon Tourism Alliance/GDC Board/Australia’s Coral Coast Board/Gascoyne Dash</td>
</tr>
<tr>
<td>Tami Maitre</td>
<td>Carnarvon Tourism Alliance/Durack Institute of Technology</td>
</tr>
<tr>
<td>Adam Morris</td>
<td>Shark Bay World Heritage Discovery &amp; Visitor Centre</td>
</tr>
<tr>
<td>Jac Eerbeck</td>
<td>Australia’s Golden Outback</td>
</tr>
<tr>
<td>David O’Malley</td>
<td>Australia’s Coral Coast</td>
</tr>
<tr>
<td>Sharon Burvill</td>
<td>Shire of Shark Bay</td>
</tr>
<tr>
<td>Darren Capewell</td>
<td>Wula Guda Nyinda</td>
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<tr>
<td>Des Matthews</td>
<td>Heritage Resort</td>
</tr>
<tr>
<td>Graheme Vinson</td>
<td>Shark Bay Tourist Association</td>
</tr>
<tr>
<td>Christine Cole</td>
<td>Tourism WA</td>
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<tr>
<td>Renata Lowe</td>
<td>Tourism WA</td>
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<td>Brooke Gregory</td>
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<tr>
<td>Ian D’arcy</td>
<td>Shire of Carnarvon</td>
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<td>Rob Paul</td>
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<td>Leah Ivy</td>
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<td>Peter Backshall</td>
<td>Marketrade</td>
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<tr>
<td>Janet Mackay</td>
<td>TRC Tourism</td>
</tr>
<tr>
<td>Name</td>
<td>Organization/Role</td>
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<tr>
<td>-----------------------------</td>
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<tr>
<td>Paul Richardson</td>
<td>Gnaraloo Station</td>
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<tr>
<td>Bernard Whewell</td>
<td>Broome &amp; the Kimberley Holidays</td>
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<tr>
<td>Evan Hall</td>
<td>Tourism Council WA</td>
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<tr>
<td>Larry Burkett</td>
<td>Potshot Resort</td>
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<tr>
<td>Cheryl Cowell</td>
<td>Shire President, Shire of Shark Bay</td>
</tr>
<tr>
<td>Ben Bellottie</td>
<td>Councillor, Shire of Shark Bay</td>
</tr>
<tr>
<td>Vicki</td>
<td>Ningaloo Reef Dive</td>
</tr>
<tr>
<td>Luke &amp; Lannie Riley</td>
<td>Sail Ningaloo</td>
</tr>
<tr>
<td>Elizabeth Gardiner</td>
<td>Tourism Lecturer, Durack Institute, Exmouth</td>
</tr>
<tr>
<td>Adam Morris</td>
<td>Shark Bay World Heritage Discovery Centre</td>
</tr>
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<td>Keith &amp; Sally Capewell</td>
<td>Shark Bay Coastal Tours</td>
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<tr>
<td>Greg Ridgley</td>
<td>Monkey Mia Yacht Charters, Aristocat</td>
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<tr>
<td>Alan Bradley</td>
<td>Regional Development Australia, Gascoyne</td>
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<tr>
<td>Marilyn Rulyancich</td>
<td>Regional Development Australia, Gascoyne</td>
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<tr>
<td>Colleen Quirk</td>
<td>Manager, Small Business Centre, Gascoyne</td>
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<td>Leonie McLeod</td>
<td>Warroora Station</td>
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<tr>
<td>Dannielle Richardson</td>
<td>Carnarvon Chamber of Commerce</td>
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<tr>
<td>Yvonne Fahl</td>
<td>Amcal Chemist, Carnarvon</td>
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<tr>
<td>Max March</td>
<td>Councillor, Shire of Carnarvon</td>
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<tr>
<td>Stephanie Leca</td>
<td>Carnarvon Visitor Centre</td>
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<tr>
<td>Megan Harris</td>
<td>Natural Therapies, Carnarvon</td>
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<tr>
<td>Bev Gundalch</td>
<td>Best Western Hospitality Inn, Carnarvon</td>
</tr>
<tr>
<td>James Baillie</td>
<td>Baille Lodges, Sydney</td>
</tr>
</tbody>
</table>
APPENDIX II

SUMMARY OF LOCAL PRIORITIES

The following local projects have been identified by stakeholders during the consultation phase of this Plan, and whilst they are not specifically addressed in the implementation plans or strategic priorities, they are important local level tourism related initiatives that can be driven by a range of stakeholders (operators, shires, agencies) and will also contribute to visitor experience and the value of tourism in the Gascoyne.

- Develop eco-tourism ventures - including with an indigenous component
- Marketing and promotion of a HMAS Sydney II Trail
- Dirk Hartog Island NP - improved access, product development & eco-tourism opportunities
- Development of nocturnal fauna tours – Francois Peron National Park
- Expand bush camping experiences throughout Shark Bay area
- Tourism development on ‘Potters Block’ in Denham
- Enhance and grow existing events and identify new opportunities e.g.
  - Shark Bay Festival of Discovery
  - Shark Bay Fishing Fiesta
  - Gascoyne in May
- Development of the aquaculture and associated tourism activity precinct on land vested for that purpose just north of Monkey Mia

- Land assembly to attract new commercial caravan park - Truscott Crescent
- Improved and new campground facilities and day visit infrastructure within Cape Range National Park
- Encourage new hotel/resort investment in Exmouth
- Cruise Ship industry development
- Development of a Trail Master plan for the Ningaloo region
- Development of Ningaloo Centre with visitor centre, interpretive, local history and research facilities
- Vlamingh Head lighthouse to be made accessible for tours
- Develop a black waste dump point
- Continue Exmouth town centre enhancement and attractiveness
- Continue improvements to Town Beach area, Exmouth Gulf Foreshore
- Encourage development of small scale tourism retail and offices and eateries/restaurant in the Marina development area
- Improve Tantabiddi Boat Ramp with a sand trap structure
- Improve Bundegi Beach area
- Redevelop Entry Statements at turn-off from Northwest Coastal Highway
- Enhance and grow existing special events and identify new opportunities e.g.
  - Whaleshark festival
  - GAMEX
- Exmouth Race Course
- Develop Kennedy Range Loop Road and visitor facilities
- Gascoyne River crossing upgrade
- Development of river walk trails
- Develop fossil and fossick trails
- Local Interpretation infrastructure, including:
  - Old Pub Site
  - Gascoyne Murchison Outback Pathways
  - Cultural Trails
- Enhance and grow existing events and identify new opportunities e.g.:
  - Gascoyne Food Festival
  - Gascoyne in May
  - Gascoyne Dash
- Gascoyne Food – renew, rejuvenate and promote, encourage local participation (including alfresco dining)
- Road access from Gnaraloo to Coral Bay
- Investigate potential development of ‘Hot Springs’ attraction
- Renew and rejuvenate children’s activity parks
- Redevelopment of Carnarvon Yacht Club Marina
- Ongoing Enhancement and Development of the Carnarvon Fascine and main street
- Airport development
- Promotion of the southern end of the Ningaloo Reef (including entry signage)
- Upgrade of public facilities in the town
- Ongoing enhancement and support for Visitor Centre
- Enhance tourism signage, including welcome statement
- Investigate RV Friendly options
- Investigate collection of data & statistics relating to visitors (e.g. number and expenditure)
- Investigate eco-tourism options, including Indigenous component

- One Mile Jetty restoration and development
- Implementation of Blowholes Master Plan
- Encourage new accommodation investment, particularly high end
- Whitlock Island development including multipurpose sporting facility, golf course, tennis, bowling
- Gwoonwardu Mia - renew and rejuvenate, Arts Centre Development & cultural trails
- Redevelopment of OTC Site/Museum
- Develop & promote local history trails including HMAS Sydney II; Historical sites; Honouring the 100 year Gallipoli anniversary
- Enhance and grow existing events and identify new opportunities e.g.:
  - Gascoyne Dash
  - Gascoyne in May
  - Junction Races
- Gascoyne Food – renew, rejuvenate and promote, encourage local participation (including alfresco dining)
- Road access from Gnaraloo to Coral Bay
- Investigate potential development of ‘Hot Springs’ attraction
- Renew and rejuvenate children’s activity parks
- Redevelopment of Carnarvon Yacht Club Marina
- Ongoing Enhancement and Development of the Carnarvon Fascine and main street
- Airport development
- Promotion of the southern end of the Ningaloo Reef (including entry signage)
- Upgrade of public facilities in the town
- Ongoing enhancement and support for Visitor Centre
- Enhance tourism signage, including welcome statement
- Investigate RV Friendly options
- Investigate collection of data & statistics relating to visitors (e.g. number and expenditure)
- Investigate eco-tourism options, including Indigenous component

- Redevelopment of lookouts and access infrastructure
- Foreshore development including re-routing of vehicle access
- Entry statement and information parking bay at town entrance
- New public ablutions facility
APPENDIX III

GASCOYNE TOURISM STRATEGY – DELPHI PANEL FINDINGS

BACKGROUND

KPP Business Development was been contracted by the Gascoyne Development Commission to develop the Gascoyne Regional Tourism Strategy. Consultation with key stakeholders in the region was completed by Grant Smart and Melissa Hartmann over the week of February 17, 2014. A range of views, opinions, opportunities and barriers were identified through this consultation process.

The next phase of this project was the establishment of an expert panel of tourism operators, tour and accommodation providers and regional stakeholders. The Delphi panel approach was adopted for this phase of consultation which involved an online survey whereby panel members were asked to provide an initial score / rating on varying aspects of the local tourism industry. The objective was to try to reach a consensus view of priorities and strategies. Ultimately, this process sought to determine what the priority issues are for the regional tourism industry and the most appropriate strategies going forward.

The first round commenced on Wednesday 9 April via email.

PANEL COMPOSITION

Email invitations to participate in the Delphi panel process was sent to 32 people identified through the initial consultation period. 29 started while 22 completed the survey. On average, it took 19 minutes for participants to complete the survey.

In order to ensure good representation of each Shire region, participants were asked to tell us where they live. As shown on the accompanying chart, a good cross representation was received, albeit skewed towards Carnarvon.

Participants were asked to identify the category that best described their role in tourism. Again, respondents provided a good representation of the tourism and stakeholder industries.
The survey was structured in three sections:

- Tourism Development
- Markets, Opportunities and Limitations
- Regional Collaboration

A summary of key findings follows.

**Tourism Development**

There was relatively poor consensus regarding the top five (5) attractions within the Gascoyne region with Ningaloo Reef being nominated as number 1 by 17% of participants followed by whale shark interaction by around 15%. Cross tabulation of data shows that there is a strong correlation between place of residence and results of key attractions in that respondents were more likely to prioritise significant tourist attractions within their own Shire region.
Panel participants were provided a map of proposed accommodation options along the coastal section of the Ningaloo region between Carnarvon and Exmouth. Five types of accommodation options (Tourism Nodes) were identified on the map supplied by WA Planning Commission and participants were asked to rank the options based on the greatest potential to grow tourism.

Again, there was little consensus in the results with around one-third of respondents stating tourism nodes of up to 500 beds, while around 30% stated Eco Lodges and so on. However, there was clear consensus that Homestead tourism nodes provided little growth potential.

The development of Major Tourism Nodes (up to 500 beds) had been identified in 6 locations and respondents were asked to rank each location based on the locations potential to increase visitor numbers and visitor spend in the region. As noted on the chart below, there was no consensus in terms of priority locations.
MARKETS, OPPORTUNITIES AND LIMITATIONS

Participants were asked to nominate the target market segment believed to have the greatest potential to generate revenue growth for the Gascoyne region into the future. Around one-third of participants identified high yield couples (fly/drive) while about one-quarter identified Adventure Seekers.

Consultation with key operators and stakeholders in the region suggested that it is difficult for visitors to appreciate all that the region has to offer. To make it easier for visitors to appreciate the range of attractions within the Gascoyne region, participants were asked to rank priority measures that should be considered. Although there was no single measure that the majority considered a priority, it is interesting to note that all measures that were internet/technology based received low support.

Priority Target Segment

- Adventure seekers: 24%
- International visitors: 12%
- High yielding couples (fly/drive): 32%
- Families (Self Drive): 16%
- Grey Nomads: 8%
A number of limitations to future tourism growth were raised through the consultation process. Participants were asked to rank the top 5 barriers to growth. Around one-fifth of respondents identified aging infrastructure and there was a relatively even spread around issues of air access, age of accommodation properties and poor access through the region.
Participants were asked to consider opportunities that would be the greatest contributor to tourism growth, if money was no barrier.

There was strong consensus that improved air access to attract high yield visitors was the priority by 40% of respondents.
Regional Collaboration

Consultation with key regional stakeholders suggested a need for greater collaboration. Participants were asked to agree or disagree with a series of statements. There was high level of consensus on many issues with 100% of respondents agreeing or strongly agreeing for the need to better co-ordinate regional tourism efforts.
The final question asked respondents to consider the roles and responsibilities of the various stakeholders committed to the growth of regional tourism.

Over 40% of respondents agreed that the key role of the Chambers of Commerce should focus on an advocacy role.

There was less agreement around the issue of product development which was seen as the key role of tour operators (27%) and aboriginal organisations (27%).

There was also little agreement regarding the organisations that should lead tourism strategy with around 22% suggesting the Development Commission; 19.6% suggesting town based tourism alliances; 18% identifying Tourism Australia and a further 18% identifying Tourism WA.
Overall, there is little consensus by the Panel in relation to market segment opportunities, key attractions, barriers to growth and future development. However, 100% of participants agreed that there was a need for better coordination of regional tourism efforts.
**APPENDIX IV**

**PROJECT METHODOLOGY**

The methodology for this project looked to develop a Tourism Strategy for the Gascoyne region founded on a coordinated approach, and collaboration amongst stakeholders in order to promote and facilitate continued tourism growth.

A key aim of the project was to build on related plans and existing areas of focus to assist tourism stakeholders to identify and prioritise projects and initiatives that will contribute to establishing the Gascoyne as a destination of choice.

Stated outputs for the project included the identification and prioritisation of:

- Tourism infrastructure enhancements
- Creation of a broader range of visitor experiences
- Tourism projects within the region
- Regional marketing opportunities
- Opportunities to maximise the potential of the tourism industry in local economies
- Aboriginal employment within the regional tourism industry
- Opportunities to develop the capacity of the industry

The project methodology comprised a six (6) phase process which is summarised in the following chart.

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Confirmation &amp; clarification of project parameters</th>
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<tbody>
<tr>
<td>Phase 2</td>
<td>Desktop Research / Review</td>
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<tr>
<td>Phase 3</td>
<td>Industry &amp; Stakeholder Consultation</td>
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<td>Analysis</td>
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<td>Phase 5</td>
<td>Strategy Development</td>
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<tr>
<td>Phase 6</td>
<td>Documentation</td>
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</table>
CONFIRMATION & CLARIFICATION OF PROJECT PARAMETERS

The first step in this project involved an initial meeting with the Gascoyne Development Commission in order to confirm and clarify project parameters and target outcomes.

DESKTOP RESEARCH & REVIEW

The second phase of the project focused on desktop research and a review of existing reports, plans and strategies relevant to tourism in the Gascoyne region.

A list of plans and reports reviewed included:

- Tourism WA - State Government Strategy for Tourism in Western Australia, 2020
- Tourism WA - Australia's Coral Coast, Tourism Development Priorities 2010-2015
- Tourism WA - Australia's Golden Outback, Tourism Development Priorities 2010-2015
- Shire of Carnarvon - Carnarvon Tourism Strategy, 2010;
- Tourism WA - Australia's Coral Coast, Destination Development Strategy 2004-2014
- Tourism WA - Making a difference, Aboriginal Tourism Strategy for Western Australia 2011-2015
- Department of Planning - Carnarvon to Exmouth Ningaloo Coast Regional Strategy, 2004
- Tourism WA - Western Australian Cruise Shipping Strategic Plan 2012-2020
- Gascoyne Regional Development Plan 2010-2020
- Dirk Hartog Island, Draft Management Plan
- Tourism WA, Regional Fact Sheets
- Ningaloo Shark Bay Experience Development Strategy

These documents were reviewed in order to develop an understanding of any gaps in information, and particular issues that may require clarification or input from stakeholders during the consultation phase. The desktop phase was also used to clarify the current key visitor market segments.

CONSULTATION

The consultation phase of this project was extensive. Meetings and discussions were held with in excess of 65 industry stakeholders that included tour operators, Visitor Centres, accommodation providers, tourism organisations / bodies, regional agencies and industry associations. A range of techniques were used including telephone, face-to-face meetings, electronic /online and community forums.
Initial consultation was undertaken with stakeholders to validate baseline information drawn from the desktop research, in addition to gaining their own perspective on priorities for the region.

Key aspects discussed as part of the consultation phase included:

- Determining the priority visitor market segments that will represent the focus of strategy development
- Identifying opportunities to develop tourism infrastructure to meet the needs of priority market segments
- Identification of opportunities to develop tourism products that enhance the visitor experience for priority market segments
- Developing an industry perspective of what will set the Gascoyne apart from other regions in order to become a destination of choice.
- Identifying any barriers, constraints and/or limitations that need to be overcome in order to grow the industry

The findings from the desktop research and initial consultation formed the basis of issues, topics and related questions used in the Delphi Panel (refer Appendix II). The Delphi Panel technique was used to determine the level of consensus amongst the industry in relation to specific issues, potential opportunities and strategic market focus going forward.

The Delphi method also provided Panel members with the opportunity to submit qualitative comments/feedback/rationale into the assessment process.

In terms of the consultation phase, the aim of the Delphi Panel method was to determine regional consensus regarding the strategic priorities for the regional tourism industry going forward, how they can be achieved and what inputs will be required.

The Gap Analysis phase of the project was followed by further consultation in the form of Community Forums conducted in Exmouth, Coral Bay, Carnarvon and Shark Bay, with some participants attending by phone.

Meetings/discussions were also held with the Project Steering Committee as part of the consultation process, in addition to regular contact being maintained with the Project Manager. In total, over 65 individual stakeholders and organisations were consulted throughout this project. A list of stakeholders is provided as Appendix I.
GAP ANALYSIS
This phase built on the work undertaken as part of the desktop review and integrated stakeholder feedback and information into a strategic assessment of industry gaps.

Gap analysis was completed taking into account baseline data and information and compared against the strategic aspirations and opportunities identified through the consultation phase.

Importantly, the gap analysis process was used to highlight and quantify any challenges and constraints that may need to be overcome in order to achieve strategic objectives, as well as putting into context the resources needed, indicative timelines and related stakeholders.

STRATEGY DEVELOPMENT
This phase of the project focused on the development of strategies that will facilitate and guide the future growth of the tourism industry in the Gascoyne region.

Strategic priorities were drawn from the findings of gap analysis in the context of key market segments identified through the desktop review and subsequently validated through the consultation phase.

Strategy development was framed within the bounds of what can be controlled or influenced by the region’s tourism industry together with other key factors and interdependencies that involve the broader community and small business sector.

Strategy development also included high-level implementation plans and a model to guide the achievement of strategic objectives. These plans took into consideration specific actions, resources required, responsibilities / lead agencies, timelines and potential funding sources where relevant.

DOCUMENTATION
The final phase of this project involved the documentation of the strategy whereby the findings and recommendations were incorporated into an overarching document that clearly articulated the strategic priorities for the tourism industry going forward, and how this will be achieved.
APPENDIX V

SUPPORTING INFO

DESTINATION LIFECYCLE

The following Destination Lifecycle diagram is sourced from Tourism Western Australia’s Tourism Development Priorities Australia’s Coral Coast Report, 2010.

The report notes that:

“In determining the priorities for tourism product and infrastructure development in Australia’s Coral Coast, analysis has been conducted at a sub-regional level. This analysis includes a look at each region’s strengths, unique selling points as well as providing an analysis of the current status of, and potential gaps in access, accommodation, attractions, activities and amenities. The Tourism Area Lifecycle is a theoretical product lifecycle concept developed by Richard Butler to help track the development of destinations. According to this model, destinations move through different stages in development, starting off with exploration and then moving through stages of involvement, development, consolidation and stagnation before going through different degrees of decline or rejuvenation. Destinations have been evaluated in the context of the Western Australian tourism market with input from local, regional and state-wide stakeholders.”

Australia’s Coral Coast – Tourism Area Lifecycle

(Note: Bubble size represents each destination’s relative economic contribution to tourism in the region based on the number of domestic and international visitor nights and day trips to the destination.)
TWA Market Segment Characteristics
Market Segments as defined and used by Tourism Western Australia.

Dedicated Discoverers (DD)
This market can be broadly described as including the following characteristics:

- Working families 35-64 years
- Wanting to discover something new
- Community minded and socially active
- Are drawn to ‘undiscovered’ destinations and a large percentage like to holiday in Australia
- A large percentage have a household income in excess of $100,000 pa.
- Classed as big discretionary spenders
- Motivations for travel include self-development, adventure and engaged observation

Aspirational Achievers (AA)
This market can be broadly described as including the following characteristics:

- Working families 35-64 years
- Have achieved success (e.g. ‘made it’) in their chosen field
- Travel frequently but often look for strong value proposition
- Spend big on holidays as a means of reward
- Enjoy holidays that involve resorts, wine, food and activities
- Are generally ‘pressed for time’ and therefore likely to take shorter, more frequent breaks
- Look for variety but travel to aspirational destinations
- A large percentage have a household income in excess of $100,000 pa.
- Classed as big discretionary spenders
- Motivations for travel include indulgence, relaxation, variety

Grey Explorers (GE)
This market can be broadly described as including the following characteristics:

- Also known as ‘grey nomads’ and represent the elder age demographic (60+ years)
- Focus on experiencing what they have not yet done, or missed out on. It is their time to explore!
- Have lots of time to explore and experience new things and cherish opportunities to connect with loved ones in their travels
- Often travel with caravans and campervans thereby reducing accommodation costs while travelling, so their trip can last longer
- Spend time sightseeing and visiting friends and relatives
- Generally ‘budget conscious’
Family Connectors (FC)

This market can be broadly defined as including the following characteristics:

- Generally represented through a wide age demographic (Families of all ages)
- Devote a lot of their time to building the home / lifestyle for their children
- Use holidays to connect with children, partners and other family members
- Generally self-drive and rented accommodation
- Travel to traditional family destinations