



Mid West **TOURISM**

Development Strategy

Prepared by
Evolve Solutions

AUGUST 2014

PREAMBLE

The Mid West Development Commission and Regional Development Australia in collaboration with the Department of Planning and the Mid West Tourism Alliance commissioned this project to establish a regional tourism development strategy. The ultimate objective of this project was to identify tourism opportunities, game changers, priorities and gaps for the Mid West region to inform future development and investment. Extensive consultation and analysis concluded that the Mid West is underperforming as a tourist destination in that its potential is not being realised. The recommended strategy to grow Mid West tourism during 2015-2025 focuses on five key areas.

1. Increasing accommodation capacity from camping through to resorts;
2. Opening up day use sites-places previously overlooked or under-developed to enhance the Mid West's appeal as a destination;
3. Improving the quality and distribution of information for pre-trip planning and way finding;
4. Attracting more high-yield visitors and the growing self-drive and RV market; and
5. Increasing the range of Aboriginal and eco nature based tourism activities, attractions and experiences.

Success of the strategy is reliant upon the collaboration of government, tourism operators, industry stakeholders and community in resourcing and supporting a regional approach to tourism development.

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JULY 2014

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Sustainable tourism solutions for the benefit of communities and the environment.*

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Abrolhos Islands

EXECUTIVE SUMMARY

The Mid West Tourism Development Strategy is a regional initiative commissioned by the Mid West Development Commission, Regional Development Australia, Department of Planning and LGAs across the Mid West region.

The strategy is the direct result of the Mid West Regional Blueprint process undertaken in 2013/14. The Mid West Regional Blueprint is this region's growth and development plan that proposes a number of high level strategies. It identified five key pillars through which targeted development strategies and subsequent investments would be made to grow the region for a population scenario of 190,000 by 2050. A critical element identified in the Economic Development Pillar was "Tourism", as one of the key focus areas that would drive the region's long term economic growth.

The Mid West Tourism Development Strategy aims to facilitate a coordinated, collaborative approach to grow regional tourism and maximise the Mid West's existing tourism capacity (2015 to 2025) by:

- Identifying tourism opportunities, game changers, priorities and gaps for the Mid West region to inform future development and investment.
- Identifying the priorities and opportunities that will help the Mid West achieve the goal of hosting 1,000,000 overnight visitors by 2050 as outlined in the Regional Blueprint.

The strategy was developed during January to June 2014 through desktop analysis, consultation, regional workshops and field trips.

Mid West tourism has significant potential to grow the tourism economy and stakeholders have recently embraced the need for collaboration in pursuing regional development of tourism. Growth in Mid West tourism has been erratic due partly to the region's aged tourism infrastructure, limited choice of holiday destinations, lack of 'iconic' appeal, assorted branding, and competition from neighbouring world heritage areas and overseas destinations.

The region's tourism has evolved unevenly and irregularly as a result of resource constraints and the Shire's LGA-centric approaches to infrastructure development, marketing and visitor servicing. Although the Mid West has popular destinations that bring seasonal holidaymakers, many travellers transit through the Mid West enroute to farther destinations reducing potential growth in tourism.

Recent and ongoing upgrades to the Geraldton Foreshore, Kalbarri National Park, the Wildflower Way and Dongara-Port Denison have potential to increase visitation. Similarly, several Shires are working towards becoming Recreational Vehicle (RV) friendly towns in anticipation of a growing RV visitor market. The Mid West Tourism Alliance has also been established to help drive a more collaborative approach to developing tourism across the Mid West.

There are however, gaps to address in the Mid West's tourism including:

- Distinct and separate branding of towns and therefore no coherent (regional) identity in the minds of visitors;
- Varied approaches to visitor servicing and mixed standards of information for way finding (i.e. navigating to places of interest);
- Lack of distinctive 'iconic' activities and experiences compared to neighbouring regions;
- Accommodation, which is generally aged, and of mixed standards, and is at times below visitor expectations, with supply limitations during peak seasons;
- Limited RV and traveller amenities and accommodation options, such as low-cost or freedom camping for travellers transiting or stopping overnight;
- Regional produce is not highly promoted in hospitality venues; food-wine-culinary experiences are under-represented; and food tourism is under-developed;
- Aboriginal tourism activities-experiences are under-represented; and
- Digital media and online promotional information is limited, including gaps in town information, day trip options, experiences available and recommended 'must-do' activities.

The key tourism opportunities identified for the Mid West include:

- The Abrolhos Islands maritime history and nature based experiences;
- Develop an iconic 'skywalk' lookout, sealed access roads, a naturebank eco camp, campground and trail upgrades in Kalbarri National Park;
- Develop coastal campsites and day use visitor nodes from Green Head to Kalbarri;
- 4WD trail along the Zuytdorp Coast linking Kalbarri to the Shark Bay World Heritage Area;
- The development of tourism-recreation infrastructure across the Department of Parks and Wildlife's conservation blocks (Karara, Muggon, Doolgunna-Mooloogool and Dalgaranga);
- Develop geo tourism and a geo park in the Murchison;
- Aboriginal tourism experiences and activities;
- Develop prospecting reserves in the Murchison;
- Support Murchison Pastoral properties to develop tourism infrastructure including station stay accommodation, campgrounds and day use sites;
- Extend and enhance the Wildflower Way, and develop interactive components of the Artbelt Project, creating a drive 'loop' with year-round appeal;
- In the North Midlands develop additional self-drive routes with rest and overnight areas; audit potential campsites and develop 4-5 eco campgrounds; and upgrade a selection of trails to multi use (walk, bike, horse, 4WD) or create new trails at popular sites; and
- Headworks and planning pre-approval for a conference-function facility in Geraldton.

The long term aspiration of this strategy is for the:

- Mid West to attract 1,000,000 overnight visitors by 2050, staying 5,000,000 nights, and generating overnight expenditure of \$544,000,000;
- 616,000 day trip visitors generating \$67,000,000 expenditure by 2050; and
- the Mid West to be recognised as a leading self-drive region offering a wide range of high quality, year-round options for the Aspirational Achiever, Dedicated Discoverer, Grey Explorer, Family Connectors and Experience Seeker markets.

The key to the strategy is increasing capacity to grow the visitor market and extend the length of stay; improve way finding to disperse visitors across the region; increase opportunity for expenditure (e.g. tours, hospitality and accommodation); and build a stronger profile as a diverse destination extending from outback to coast to island.

The success of the strategy is contingent upon the changes recommended in this strategy. The strategy recommends a region-wide transition from LGA-centric tourism planning to collaborative 'visitor-centric' regional tourism development. A number of initiatives have been identified to help with the transition. Central to this are subregional memorandums of understanding (MOU), which LGA's in the Murchison are working towards and the Batavia Coast and North Midlands may also adopt in the near future.

The priority investment opportunities are integral to the strategy and are dependent upon funding from a range of sources including public private partnerships and co-funding. Visitor servicing is an important enabler of visitor experiences and expenditure and a broader reach is required by establishing 'information nodes' across towns and redefining how the larger visitor centres engage with the tourism sector. Good decisions require quality information and so a dedicated marketing research program is required to ensure visitor desires, motivations, preferences and satisfaction are closely monitored.

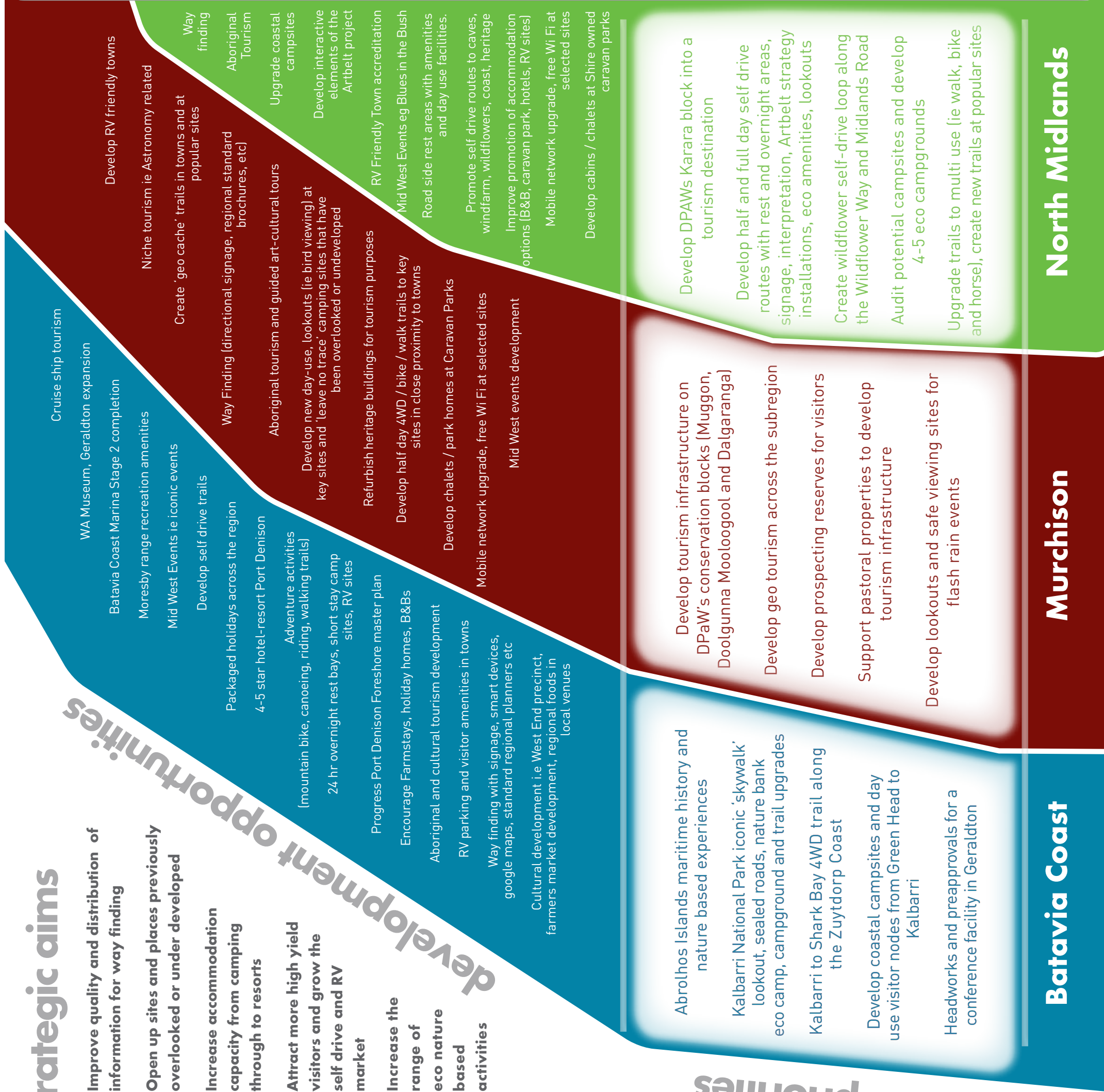
The Mid West is a large area (i.e. 478,000km²) and it is difficult to travel north-south across WA without traversing the Mid West and this invites the development of regional linkages that capture different types of visitors and different modes of transport.

An overview of the Mid West tourism development strategy is presented on the following page.

strategic aims

- ➡ **Improve quality and distribution of information for way finding**
- ➡ **Open up sites and places previously overlooked or under developed**
- ➡ **Increase accommodation capacity from camping through to resorts**
- ➡ **Attract more high yield visitors and grow the self drive and RV market**
- ➡ **Increase the range of eco nature based activities**

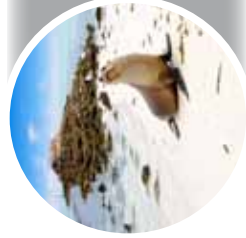
subregional priorities



2050 vision

The Mid West attracts one million visitors each year that stay and enjoy the region for longer...

regional priorities



Abrolhos Islands eco accommodation and amenities



Kalbarri National Park iconic skywalk, road sealing, naturebank site, eco campground



Develop coastal nodes and campsites



Kalbarri to Shark Bay 4WD trail along Zuytdorp coast



Develop DPAW blocks (Karara, Muggon, Doolgunna Mooloogool, Dalgara) into tourism destinations



Develop geo tourism and a geo park

Where is Mid West Tourism Now?

425,000 overnight visitors, 2.1M visitor nights, \$240M overnight expenditure, 320,000 day trip visitors p.a. (avg).

Drawcards: Kalbarri, Dongara / Port Denison, Geraldton, Wildflower Country, regional towns, Murchison prospecting, outback experiences and station stays.

Adequate hotel capacity; many aged facilities; mixed quality and tourism focus.

Many holiday homes; limited caravan park and camping capacity in peak season.

Town branding, fragmented identity, LGA-centric visitor information.

Mostly adequate signage, mixed quality and standard, some gaps in way-finding.

LGA based tourism planning; tourism a low-med priority; limited resources.

Low priority afforded to self-drive, RV and camping segment and trail infrastructure.

Many travellers passing through; many seasonal short stay and overnight visitors.

3 Shire and 2-3 subregional tourism groups. Minimal collaboration, limited regional planning and no resource pooling.

Growth in tourism has been low.

Where is tourism in Australia, WA and the Mid West aiming?

Australia Tourism 2020.

WA Tourism 2020.

ACC and AGO Tourism Development Priorities 2012-2015.

Mid West Regional Blueprint 2015-2025.

Mid West LGA's. Capacity / infrastructure building, visitor services, branding and collaboration.

Common Tourism Aims

Grow visitation from China.

Develop and promote eco tourism (e.g. National Landscapes).

Encourage eco nature, food and cultural tourism experiences.

Grow domestic and regional tourism, incl. self-drive and high yield visitors.

Increase infrastructure and events that deliver Experience Extraordinary.

Increase visitors to regional WA.

Increase opportunities to have an aboriginal tourism experience.

WA's Caravan and Camping Action Plan.

WA's nature-based tourism strategy.

Where does Mid West tourism want to be?

1M overnight and 616,000 day trip visitors p.a. by 2050.

5,000,000 visitor nights p.a. by 2050.

\$544 million p.a. overnight visitor expenditure and \$67 million p.a. day trip expenditure by 2050.

988,000 day-trip and overnight visitors by 2025.

Sustainable growth in overnight visitation of 2.38%p.a. and 1.84%p.a. for day trip visits (average).

An inspiring nature-eco-culture-event destination.

A leading self-drive, coastal and outback holiday region.

A unique island eco holiday destination (e.g. Abrolhos).

An irresistible route and stopover for transient travellers.

A leader in geo tourism, conservation and unique eco experiences.

A role model for collaborative regional tourism.

How will Mid West tourism get there?

Collaboration and partnerships.

Subregional tourism MOU's.

Mid West Tourism Alliance.

Mid West Regional Blueprint.

Identified tourism priorities.

Marketing alliance with RTO's.

Standardised, high quality visitor information and way finding.

Multi-channel communication (web, social media, digital, Apps, GPS).

Increased accommodation capacity (hotels, resorts, lodges, B&B's, station stays, camping, 24hr stopovers).

Regional branding, strong town identities, experience based appeal.

Development of iconic places and experiences (e.g. Kalbarri NP, Abrolhos, conservation parks, geo park).

Event tourism, aboriginal tourism, geo tourism and coastal experiences.

Trails, picnic, day trip, self-drive options.

Support for tourism focused SME's and entrepreneurs; community, private and NFP; mentoring, training and networks.

Short, medium, long term actions; prioritised improvements.

SECTION 1 - PRELUDE

1.1 INTRODUCTION

The Mid West Tourism Development Strategy is a regional initiative commissioned by the Mid West Development Commission, Regional Development Australia and LGAs across the Mid West region.

The strategy is the direct result of the Mid West Regional Blueprint process undertaken in 2013/14. The Mid West Regional Blueprint is this region's growth and development plan that proposes a number of high level strategies. It identified five key pillars through which targeted development strategies and subsequent investments would be made to grow the region for a population scenario of 190,000 by 2050. A critical element identified in the Economic Development Pillar was "Tourism", as one of the key focus areas that would help drive the region's long term economic growth.

The ultimate objective of this Tourism Development Strategy is to identify tourism opportunities, game changers, priorities and gaps for the Mid West region to inform future development and investment. The strategy highlights the opportunities available to achieve the Regional Blueprint goal of hosting '1,000,000 overnight visitors by 2050.'

The priorities and opportunities have been identified by:

- Reviewing and building on previous tourism strategies such as MWDC's Geraldton Greenough Tourism Strategy, Tourism WA's Caravan and Camping action plan, Australia's Golden Outback development priorities, Australia's Coral Coast development priorities, WAs Aboriginal Tourism Strategy, WAs 2020 Tourism Strategy, National Long Term Tourism Strategy and Australia's Tourism 2020 Strategy;
- Extensive consultation across the subregions through one-on-one and phone interviews, and workshops to prioritise initiatives and projects for future investment;
- Determining what is required to maximise the use of current tourism offers and accommodate future visitor growth to the subregions;
- Understanding the key challenges facing tourism in the region for the next 10-20 years; and
- Reviewing the Mid West's strengths, weaknesses, opportunities and threats.



Kiteboarding, Geraldton



Yellow Kangaroo Paw



Aboriginal art, Mullewa

1.2 BACKGROUND

The Mid West is host to a significant array of flora, fauna, landscapes and coast along with vast swathes of unspoilt, remote land that offers enormous potential for tourism. Future prospects for the Mid West and the subregions are closely linked to global growth driving demand for resources, while also remaining connected to the agricultural, pastoral and seafood industries which have uncertain exposure to climate change and global warming.

The Mid West's tourism sector has suffered from being a poor cousin to the region's traditional economic drivers of agriculture, pastoralism and mining. The Mid West's tourism is considered by some to be a by-product of, or transit point for, the neighbouring world heritage areas at Shark Bay-Monkey Mia and Ningaloo-Exmouth. Further, the annual migration of seasonal self-drive travellers' enroute to / from the Kimberley and northern / eastern Australia has many visitors passing through the region, at best stopping for an overnight stay. The challenge in growing the Mid West's tourism industry is in embracing the needs of visitors and investing in initiatives that deliver value, quality and appeal, on a collaborative region-wide basis.

A significant challenge is to avoid over-investing in established iconic areas and instead encourage investment in emerging 'iconic' sites / areas that appeal to a larger cross-section of the visitor market, helping attract an increase in visitors that can better appreciate the appeal and vastness of the region, whilst attracting and dispersing visitors across the broader Mid West.

This strategy incorporates some of the principles of Butlers Tourism Destination Lifecycle, Lieper's Whole Tourism System and Edquist's Systems of Innovation.¹ An underlying premise to the strategy is that destinations move through 'phases of relative stability or incremental change interspersed with phases of radical change' (Carson & MacBeth 2005). Regional destinations are 'systems' and their advancement is achieved by increasing capacity and encouraging innovation.

This strategy also addresses fundamental gaps and opportunities in Mid West tourism aided by the five elements of Lieper's Whole Tourism System (e.g. generating regions, tourists, transit routes, destination regions and tourism industries), while recognising differences in the tourism lifecycle of each subregion and the improvements or innovation required to become an appealing destination.

Acknowledging the Mid West subregions require lifecycle-specific responses, the strategy aims to strengthen the fundamentals that encourage innovation across the tourism sector by utilising where possible the following elements.

- **Economic competence:** LGA's and tourism stakeholders working together to attract investment, establish new enterprises, grow employment, increase tourism visitation and foster local prosperity.
- **Clustering of resources:** Networking and collaboration between the Mid West Tourism Alliance, tourism operators, LGA's and the MWDC.
- **The existence of networks:** Leveraging the contacts and knowhow of stakeholders across the region to achieve improvements in tourism infrastructure, products, services and standards that stimulate growth in visitation.
- **The presence of productive development blocks:** Continued support for the MWTa, subregional tourism forums and LGA groups to implement actions.
- **Entrepreneurial activity:** Subregional leaders within the LGA's and / or local communities driving local forums and initiatives.
- **An effective critical mass of resources:** Grants and funding, in-kind and volunteer support, Federal, State and Local government programs, in addition to the resources available in each subregion.
- **Institutional infrastructure:** Includes the proposed subregional memorandums of understanding for tourism, Mid West Tourism Development Strategy, the MWDC's Regional Blueprint, LGA Business and Corporate Plans, and Local Tourism Plans.
- **A leading role of local government:** Eighteen individual LGA's as well as subregional forums.
- **The production and distribution of knowledge:** The monitoring of progress in the implementation of the region's tourism related strategies contributing to a wider understanding of tourism development across a large part of Western Australia.
- **The quality of social capital:** Includes local tourism associations and forums, business-commerce groups, community development groups and social enterprises across each of the subregions and the Mid West contributing to the growth of communities.

¹ Edquist, C. 'The Systems of Innovation Approach and Innovation Policy: an account of the state of the art', Proceedings of DRUID Conference Aalborg. June 12-15, 2001.

1.3 PLANNING CONTEXT

To understand the tourism planning context of this strategy, and to identify priorities that align with State and National tourism priorities, a review of existing plans and strategies was undertaken. The following strategies were deemed to be the most critical to the formation of the Mid West Tourism Development Strategy.

Tourism 2020 is Australia's national tourism strategy that integrates the National Long-Term Tourism Strategy with growth aspirations of the 2020 Tourism Industry Potential (i.e. Australia's aspirational targets for tourism). Tourism 2020 aims to enhance growth and competitiveness in the tourism industry by focusing on six strategic areas:

1. Grow demand from Asia;
2. Build competitive digital capability;
3. Encourage investment and implement regulatory reform agenda;
4. Ensure tourism transport environment supports growth;
5. Increase supply of labour, skills and Aboriginal participation; and
6. Build industry resilience, productivity and quality.



Kalbarri Gorge

The Australian Government's Tourism 2020 strategy is a long term collaboration between industry and government to maximise the economic potential of Australia's tourism sector. Initiatives relevant to Mid West tourism include rollout of the NBN, uptake of the tourism E-kit, business skills training for Aboriginal people, the Enterprise Connect program helping tourism operators, encouraging experience-based product development, and fostering linkages between tourism and the arts.

A principle aim of the WA Government's 2020 Tourism Strategy is to double the value of tourism in Western Australia from \$6 billion a year in 2010 to \$12 billion a year by 2020. The strategy focuses on the WA Government working with industry to grow business travel, international visitation and encourage development and diversification in the regions. Two of seven 'levers' of the strategy are particularly relevant to the Mid West.

1. **REGIONAL TRAVEL.** Outcome: Increase visitors to regional WA with Tourism WA supporting infrastructure in regional WA; encouraging Australia's best regional events calendar; improved caravan, camping and self-drive experiences; Extraordinary regional experiences, including nature based, culinary and cruise shipping experiences.
2. **Aboriginal.** Outcome: Provide every visitor with the opportunity to have an Aboriginal tourism experience: facilitate and support opportunities for access to land and tenure for the development of tourism; supporting industry in interfacing with government, maximising involvement in government tourism programs; opportunities and pathways for Aboriginal employment in tourism and hospitality, including through traineeships and cadetships.

WA's Aboriginal Tourism Strategy aims to facilitate a collaborative approach to the ongoing development of a sustainable, credible and visible Aboriginal tourism industry. Initiatives relevant to the Mid West include:

1. Integrating Aboriginal tourism product into mainstream domestic tourism;
2. Facilitating and supporting opportunities for access to land and tenure for the development of tourism; and
3. Supporting the development of viable and sustainable Aboriginal tourism businesses.

As at 2014 there are very few Aboriginal tourism experiences in the Mid West although there are several inspiring concepts awaiting development.

The WA Government's Caravan and Camping Action Plan (2013) focuses on infrastructure, land access, industry standards and new facilities to grow visitation and patronage across WA. Key initiatives relevant to the Mid West Tourism Strategy include:

- New infrastructure such as caravan / camping grounds in protected areas, improving overflow parks and amenities and creating additional rest areas and dump points along major routes;
- Investigation and incentives to offer 'investor-ready' opportunities for commercial caravan park development in priority areas;
- Implementation of marketing activities, training programs and accreditation to lift industry standards;
- investigation and development of camping facilities on Aboriginal lands that encourage Aboriginal participation and employment; and
- Specific projects within the Mid West include dump points and upgraded rest areas at Middle Branch, Galena Bridge, Nerren Nerren, Barradale, and Kirkalocka Station.

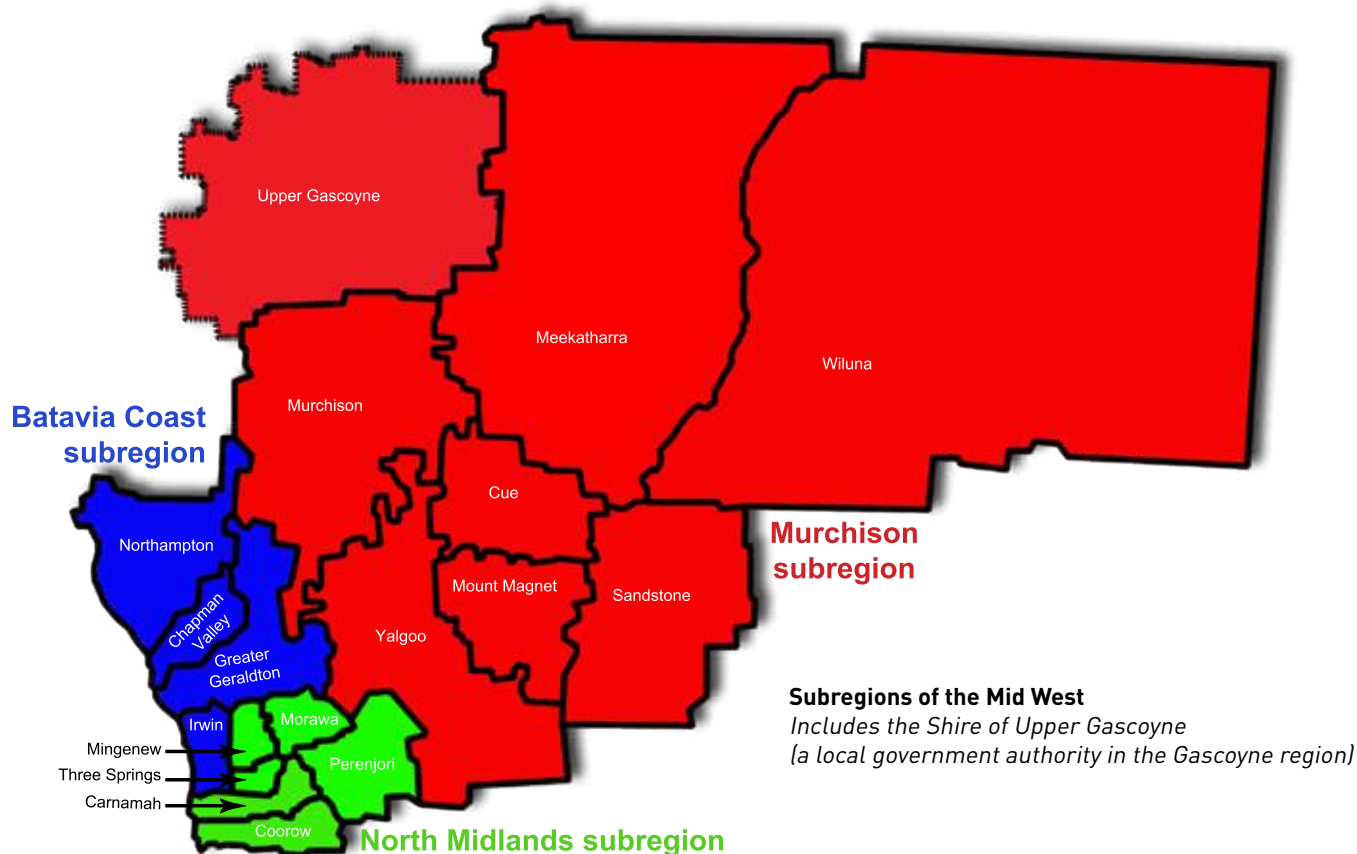
The Brighthouse Report² sets out the basis for a range of recommendations in the WA Caravan and Camping Action Plan (2013) whilst also identifying issues specific to the Mid West and Upper Gascoyne including:

- A review of the Land Administration Act that may encourage additional caravan and camping facilities on pastoral lands;
- Upgrade facilities in Kalbarri's existing caravan parks and develop an additional caravan park;
- Improve facilities and infrastructure at Cobra Station;
- Continued planning to improve facilities, capacity and quality at the Mount Augustus Outback Resort;
- A direct road link from the Murchison to Karijini National Park; and
- A new additional campground at Kennedy Range National Park.



Ellendale Pool

² Brighthouse & Starfish Business Solutions. A Strategic Approach to Caravan & Camping Tourism in Western Australia. February 2012. Prepared for Tourism WA.



TOURISM PLANNING ON THE BATAVIA COAST

The Mid West Tourism Group identified 52 priority tourism projects for this region comprising 11 attractions, five (5) access, 10 accommodation, seven (7) activities, six (6) administration and 13 amenities.

The priorities include operational improvements such as better management of activities for cruise ship passengers, delivering a value of tourism program, more effective wind sports / surfing competitions and a better business model for the Sunshine Festival. Capital-intensive projects include enhancements to walking, cycling and self drive trails, new or increased accommodation near key sites, development of activities at under-utilised sites and upgrades on the Abrolhos Islands to grow visitation.

The Geraldton-Greenough Tourism Plan outlines seven projects that could potentially change the appeal of greater Geraldton. The capital-intensive projects focus on the Abrolhos Islands, Moresby Ranges, themed walk trails, Batavia Coast Marina Development and a Marine Discovery Centre, Greenough Historic Settlement, North Road Stock Route drive trail and new events.

Geraldton's accommodation study (2009) concluded no increase in room supply was required in the short term, an additional 300 rooms were required in the medium term and 386 rooms in the long term. In the medium term, the Batavia Coast Marina is a potential site for a hotel development whilst in the longer-term coastal sites will be investigated through local planning processes.

The Irwin Tourism Development Plan 2013-18 focuses on amenities, awareness and administration followed by activities. The plan's highlights include an RV and caravan site, a review of coastal camp sites, new or improved events and cooperative marketing to promote the destination.

Shire of Chapman Valley Corporate Business Plan 2013-17 aims to develop tourism by supporting cottage industries, events and a caravan park. This includes investigating and promoting overnight caravan stay options in settlements, supporting existing and new events that promote visitation to the Shire, investigating short-term and overnight accommodation options, support development of the Moresby Range Regional Park, a walking-riding trail along the railway line between Moresby Range and Yuna and development of a recreational node at the Buller River mouth.

The Master Visitor Plan for the Wallabi Group, Abrolhos Islands highlighted the need to revisit the managing structure and authority; to establish a working group to investigate tourism across the entire Abrolhos; and a Batavia themed day trip experience to key sites, noting that the Batavia sites are National Heritage listed. There remains an overarching issue of determining the carrying capacity of the Abrolhos, its ability to support increased tourism and recreation activity and how best to manage such activity within the limits of sustainability.

TOURISM PLANNING IN THE MURCHISON[^]

The LGA's within the Murchison identified a range of tourism-related initiatives within their community and corporate plans, which form part of the medium-term planning process. The initiatives are earmarked for investigation and / or implementation during 2014 to 2024 (subject to funding and due diligence). A summary of the initiatives follows.

- Develop short-term accommodation options (Cue, Wiluna and Yalgoo Shires). For example, caravan park bays and camp sites, 24hr rest stops, ex-mining / workers camps, on-site vans, cabins and informal camp sites (e.g. at places of interest, popular sites, strategic locations).
- Upgrade visitor amenities at the town caravan park (Mount Magnet, Murchison and Wiluna Shires). For example, construct new laundry, camp kitchen, dump point, toilets or power / water points.
- Showcase the natural and cultural features / areas across the shire (Cue and Murchison Shires).
- Examine the potential of establishing a museum, cultural or interpretive centre within the towns (Murchison, Meekatharra and Wiluna Shires).
- Investigate and/or develop trails within the towns and/or at prominent sites (Yalgoo and Sandstone Shires).
- Facilitate town centre streetscape enhancement plans (Wiluna, Sandstone and Yalgoo Shires).
- Upgrade, restore and/or showcase the heritage buildings and their associated history (Murchison, Yalgoo and Wiluna).
- Continue to support and/or encourage art and cultural events (Sandstone, Cue, Wiluna and Meekatharra Shires).
- Attract and/or encourage new ventures including Aboriginal, food and horticultural (Wiluna and Meekatharra Shires).
- Continue to support visitor servicing, visitor centres and tourism promotion (Sandstone, Yalgoo, Mount Magnet and Wiluna Shires).

TOURISM PLANNING IN THE NORTH MIDLANDS

The North Midlands includes the Shires of Carnamah, Coorow, Perenjori, Morawa, Mingenew and Three Springs. During 2014 to 2023 shires in the North Midlands are planning to upgrade tourism infrastructure focusing mostly on nature based tourism experiences, making improvements to accommodation standards and capacity, and improving the range of visitor experiences.

Proposed initiatives include new walk trails to popular sites and / or around heritage areas within towns, improved self-drive wildflower trails and upgrades to caravan parks and / or short stay accommodation are also proposed. A range of new or improved visitor experiences are under investigation such as a water park, art-cultural centre, art and sculpture trail (i.e. Artbelt), a solar-thermal power project and links to DPaW's Karara block. Improvements to information for visitors are proposed such as cross-shire travel guides, website and a brochure. Shire planning in the North Midlands aims to continue focusing on wildflowers as a central theme supported by an improved range of eco tourism and nature based experiences.



'Big Ears' sculpture, Mingenew

[^] The Shire of Upper Gascoyne is part of the Gascoyne Region, however, due to synergies with Shires in the Murchison it is included in the collective 'Murchison' term resulting in 8 LGAs in the Murchison subregion referred to throughout this document.

LONG TERM TRENDS

The Mid West Tourism Development Strategy adopts a ten year time horizon and as such there are long term tourism trends that are expected to influence tourism across Western Australia and the Mid West during 2015 to 2025 as outlined below.



Rising environmental awareness: concern for impacts on the natural world, a growing 'green shift' towards environmentally aware practices, products and services, favouring undisturbed nature-based tourism experiences and conservation-driven developments.



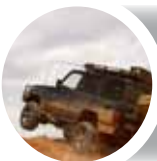
Sustainable tourism: travelling responsibly, visiting sustainable environments, having authentic experiences and tourism that delivers benefits for locals and the environment; social enterprises come to the fore as more travellers value sustainable/renewable/recyclable approaches to life



Owning a home on wheels: 500,000+ registered RV's in Australia, 20,000+ new RV's built in Australia annually, 80,000 RV's on Australian roads at any one time; the number of overnight sites-bays decreasing nationally; site shortages, overflow facilities and 'feral' camping are on the rise.



Ageing population: Aust. over 65's pop. will increase to 60% from 3.3 m (2013) to 5.3 m (2028). They will be comparatively healthier, wealthier, more active, and mobile. There's a need to understand their desires / motivations as they take to the roads in 4WD's, caravans and RV's - the 'silver tsunami' of nomads.



Changing spending patterns: rising aspirations and expectations; visitors expecting premium quality and service at affordable prices [i.e. the best for less, now]; quality and service are expected as a given; consumers buying in shops and online with social/digital media influencing spending patterns.



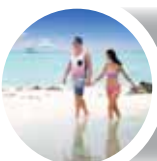
Experience economy: people valuing experiences over possessions; using experiences to express status; travel value derived from the experience (i.e. the memories, feelings and emotions); social media capturing travel experiences, profiling destinations and influencing travel plans.



Increased urbanisation worldwide: increasing world population, rising middle-class, congested cities and sprawling urbanisation; increased pressure in our daily life motivating travellers to 'escape' through holidays; the rise of holidays that immerse visitors in self-discovery, education and culture.



Asia-Pacific Tourism: steady growth in inbound / outbound travel across Asia-Pacific over the medium-long term; growth in intra-regional travel bodes well for growth in arrivals to Western Australia; culture, food, nature and leisure remain the primary motivators for international travellers.



Carbon economy: climate change and global warming becoming all-pervasive; cost of fossil fuels steadily rising; renewable energy on the rise; 'green' values becoming entrenched in all aspects of tourism; steadily rising value of biodiversity, ecotourism and 'experiencing' untouched nature.



4 mainstays: Families, retirees, internationals and solo's. Family holidays will remain a prominent driver of domestic tourism, especially in the regions, tied to school holidays; as the world's population ages, a growing number of pre-retirement and retirees will dominate cruise ship, packaged tours, and RV / self-drive travel; international travellers seeking nature-based experiences, particularly travelling to/from the Asia-Pacific region, will increase in numbers and reach; solo travellers are growing across all countries and age groups, supported by social / digital media.

SECTION 2 - ANALYSIS

2.1 SITUATION ANALYSIS

TOURISM CONTEXT

In 2013 Australia was ranked eleventh globally in terms of tourism and travel competitiveness.³ Its strengths included the highest number of World Heritage natural sites in the world, diverse fauna, a pristine natural environment and excellent air transport infrastructure. As a destination, many of Australia's strengths are sustainable such as world class nature, coastal, marine/wildlife experiences, food and wine offerings and safety. Many of these elements are entrenched within the Mid West and should be a focal point in promoting and developing tourism in the medium-long term.

As at September 2013 Australia's tourism sector was characterised as follows:

- the Chinese inbound visitor market continues to grow strongly;
- holiday travel expenditure for domestic and international visitors continues to strengthen, with expenditure rising 5.7% (Sept. 2012 to Sept. 2013);
- the high cost of travelling within Australia continued through 2013, with increases in the cost of travel, fuel and accommodation;
- In 2013, 50% of Australia's overnight domestic visitor spend occurred in regional areas and is expected to grow further as urban dwellers 'escape' the city;
- Growth for most of the world's major economies remained below trend in 2013 and led to lower growth in Australia's overseas visitor arrivals;
- Australians are travelling overseas in record numbers, but growth is slowing as the Australian dollar depreciates and the cost of overseas travel increases; and
- The Australian dollar is weakening against most other currencies, improving the price competitiveness of Australia's domestic tourism.

In Western Australia, over the 12 months to September 2013, interstate and intrastate visitor levels were up by 10% to 6.7 million visitors and this generated an additional \$195 million into the Western Australian economy. The strongest growth came from a 27% increase in interstate leisure tourists, with 343,000 visiting Western Australia.

A 2011 (TRA) study of domestic and international visitor perceptions of regional travel in WA identified a mix of active and passive activities were the key factors in motivating people to consider regional travel in WA. Travellers would consider driving to a regional destination if the trip included interesting places to stop along the way along with quality places to stay overnight. Barriers to visiting regional WA included the perceived high cost for transport and accommodation and the travel time required to reach a destination.

THE MID WEST

The Mid West is 4 hours drive or 1 hour's flight north of Perth, extending for 340km along the central west coast and extending inland for around 1000km, with Indian Ocean to the west and the Great Victoria and Little Sandy Deserts to the east. The Mid West occupies around one-fifth of WA and has hot, dry summers (15-40 Deg C.) and cool, wet winters (5-20 Deg. C).

Wildflowers of the North Midlands and natural attractions of Kalbarri and Dongara-Port Denison are currently the region's major drawcards attracting an average of 729,000 day trip and overnight visitors annually to the Mid West, mostly during holiday periods and Autumn to Spring.



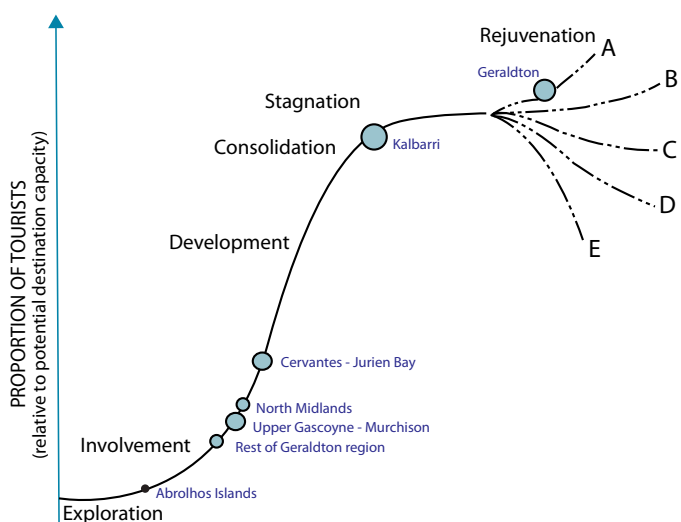
Yellow Everlastings, Coalseam Conservation Park (Mingenew)

³ J. Blanke and T. Chiesa (editors). The Travel & Tourism Competitiveness Report 2013. World Economic Forum. February 2013.

MID WEST TOURISM LIFECYCLE

The Tourism Area Life Cycle is a concept used to track the progress of a tourism region as reflected by the number of visitors. The chart below shows Geraldton and Kalbarri are at later stages in the lifecycle compared to Mid West subregions, which are at early involvement-development stages. However, why is it that the Mid West has not developed further as a popular destination? The answer may be due to several causes.

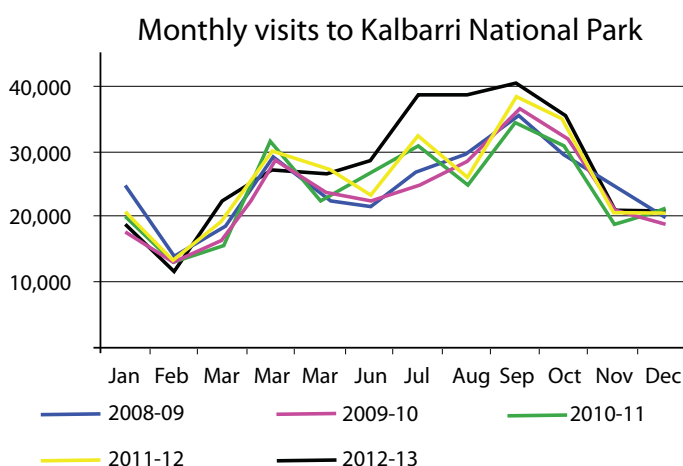
1. The Ningaloo coast, Shark Bay and Karijini have been drawcards and the Mid West is no match.
2. The Mid West hasn't delivered an iconic experience-attraction that visitors desire to visit.
3. Tourism across much of the Mid West has been a second-tier 'pop-up' industry.
4. The high cost of air travel to the Mid West, lack of quality accommodation options, LGA-centric branding, comparatively poor quality way finding tools and a lack of collaboration in developing regional tourism infrastructure and product.



SEASONALITY

Monthly visits to Kalbarri National Park (shown below) provide an indication of trends in Mid West tourism seasonality. During 2008-09 and 2012-13 Kalbarri's peak visitation occurred in September-October (e.g. school holidays, spring wildflowers) and near-peak visitation in April (e.g. Easter, Anzac, school holidays) and July-August (school holidays, wildflowers).

The shoulder periods occurred in January, May, June, November and December. Off-peak low visitation has occurred in February and March (i.e. end of school holidays, peak summer period). This amounts to 5-months peak visitation, 5-months shoulder period and 2-months off-peak low period. The Mid West hinterland is similarly influenced. Programs to extend the visitor season could include events, incentives, new experiences and unique and iconic offerings.

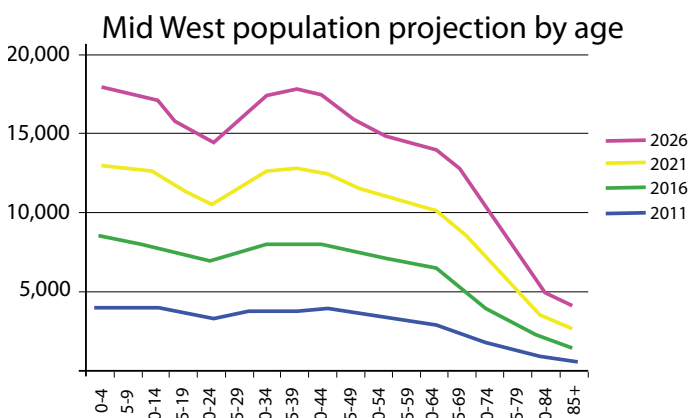


Kalbarri

MID WEST POPULATION⁴

Population projections for the Mid West indicate an increase in total population from 56,840 (2011) to around 70,000 by 2026. Projections indicate significant growth in 30-60y.o. age groups, which are fundamental to the “visiting friends and relatives” visitor segment. This can be expected to drive growth in day trips, short overnight trips and ‘getaways’ of 3-5 days across the region. Population growth is expected to help grow the visiting friends and relatives (VFR) segment from around 77,500 in 2010-12 to around 100,000 in 2026, or a 30% increase in the VFR segment.

If the Mid West’s mining-resource capacity increases significantly during 2015 to 2025 there will be increased competition for labour that may impact upon the tourism sector, similar to that experienced in the Pilbara during 2003 to 2010. Conversely, with no significant increase in mining-resource activity, the projected increase in Mid West population may help supply labour to the tourism sector and potentially contribute towards higher levels of investment in the tourism sector.



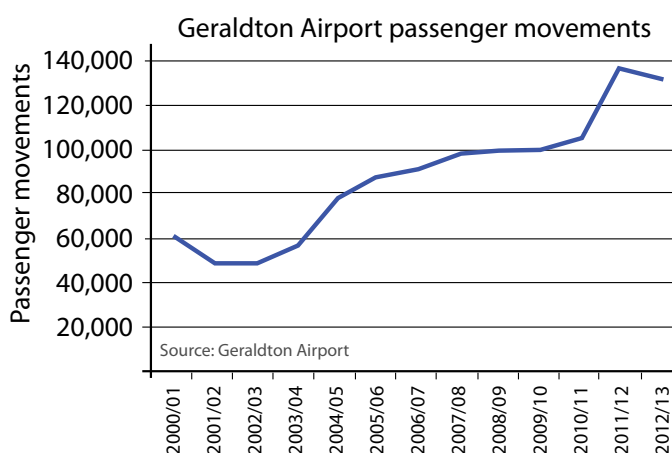
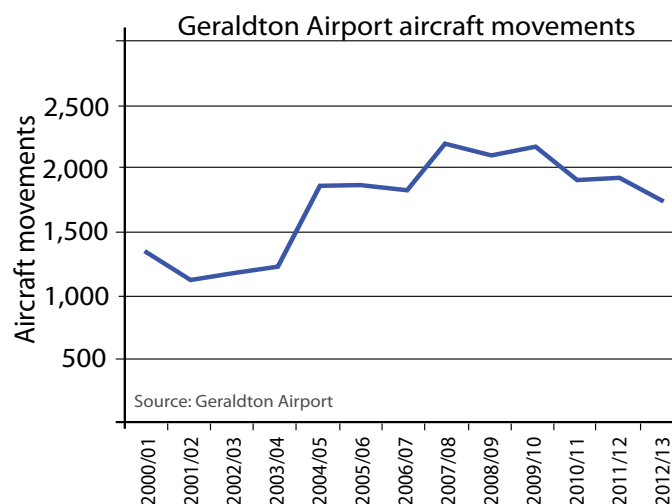
Geraldton Art Gallery

AIR SERVICES

The Mid West has four airports offering regular scheduled air services including Geraldton, Mount Magnet, Meekatharra and Wiluna (Kalbarri and Dongara are mostly charter and private-recreational flights). Geraldton airport is the Mid West’s largest airport supporting daily public transport. Some of the larger airports in the region are mostly for charter flights servicing mining or resource projects.

During 1998/99 and 2012/13 Geraldton airport’s passenger movements increased by 109% or an average 6.3% annual growth. Particularly strong growth was recorded in passenger movements during 2011/12 and 2012/13 (possibly due to the mining boom and the FIFO workforce). Geraldton Airport’s aircraft movements increased by 34% during 2000/01 to 2012/13 or an average 3.7% annual growth, with the average passenger loading per flight increasing by 61% during the same period. This is shown graphically below.

In comparison, some of the smaller airports in the Mid West, are used mostly for charter flights (e.g. mining), private-recreational flights and local aerial services (i.e. mustering, spraying and surveillance). Of the smaller airstrips, some shires are working towards attracting private-recreational flights by packaging local accommodation and hospitality services for short stay visitors.



⁴ Department of Planning. Western Australia Tomorrow. Population Report No. 7, 2006 to 2026. Forecast Profile for the Mid West Planning Region. Feb 2012. Band C, median values, are used in this instance.

2.2 VISITOR MARKET AND OUTLOOK

VISITOR MARKET[^]

In recent years domestic overnight visitor numbers to the Mid West have been trending up with an annual average of approximately 358,000 visitors with the Batavia Coast accounting for around 70%, the Murchison 20% and the North Midlands 10% of domestic overnight visitors.

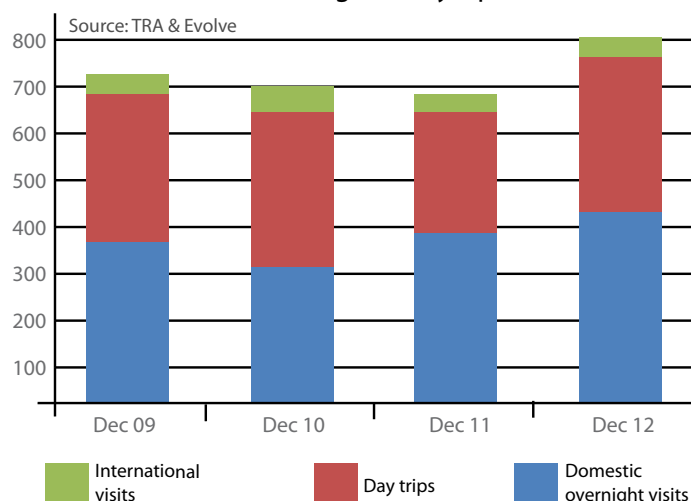
The number of international visitors has been trending down with an annual average of approximately 47,200 visitors with the Batavia Coast accounting for around 84% of visitation, the Murchison accounting for 10% and the North Midlands 6%. Day trips in the Mid West have fluctuated but otherwise remain fairly static averaging around 324,000 annually. Combined daytrips and overnight visits have an annual average of approximately 729,000 with 2012 being above average. This is shown in the charts below.

The Mid West's share of WA's domestic overnight visitors* has been static whilst its share of WA's international visitors has been declining and this is due mostly to accommodation constraints, an unchanging range of experiences, low appeal relative to its competitors and the popularity of Australians holidaying abroad.

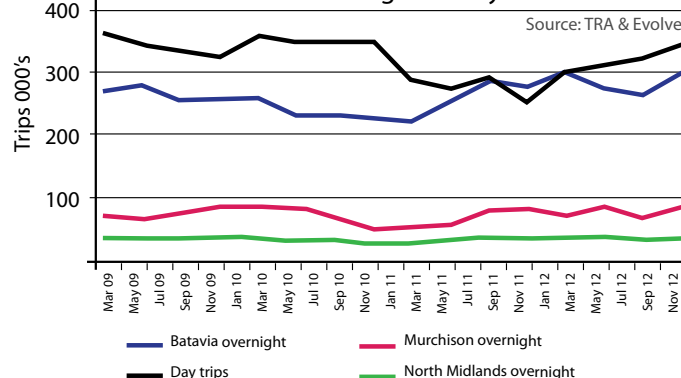


Sealion, Abrolhos Islands

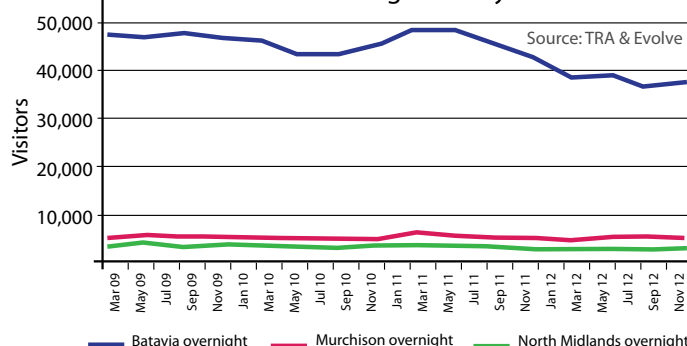
Mid West overnight & daytrip visits '000



Mid West Domestic Visitation
Year ending monthly



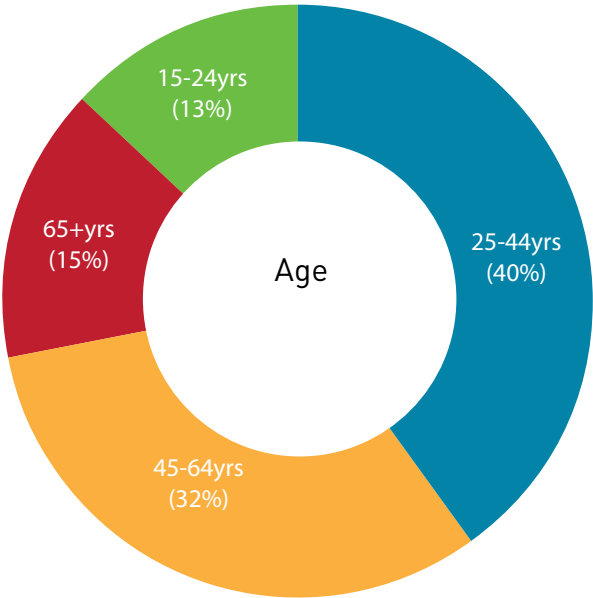
Mid West International Visitation
Year ending monthly



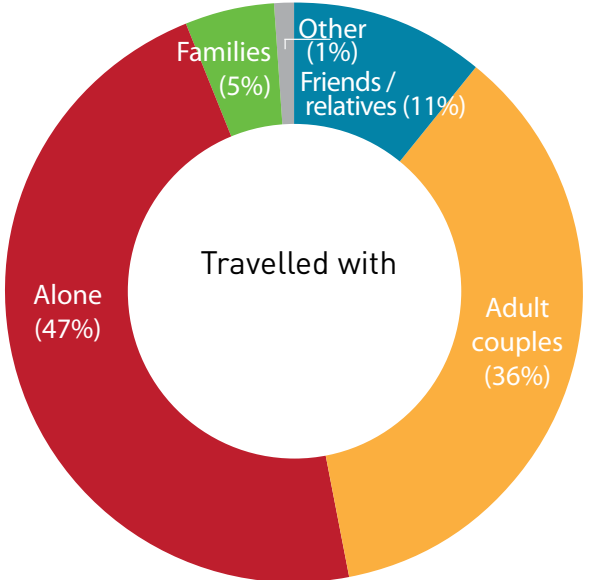
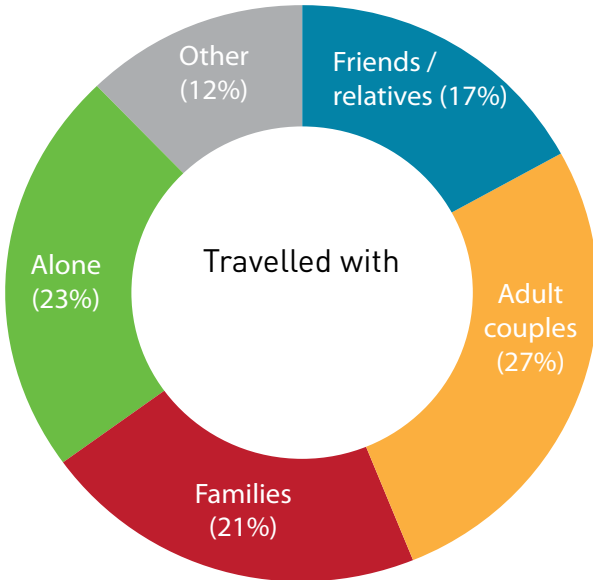
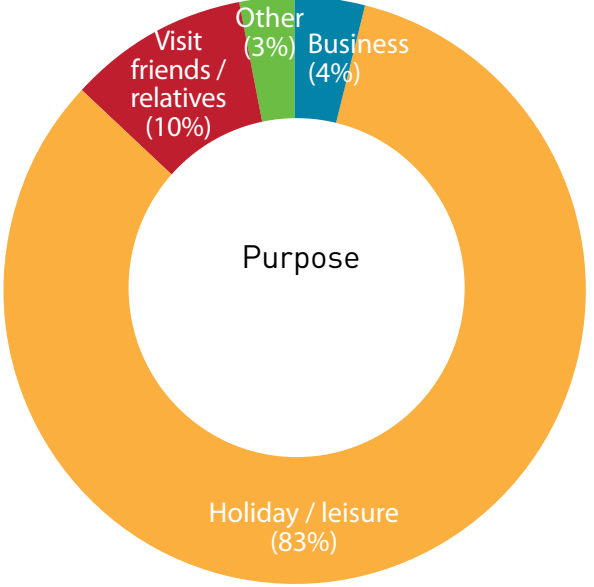
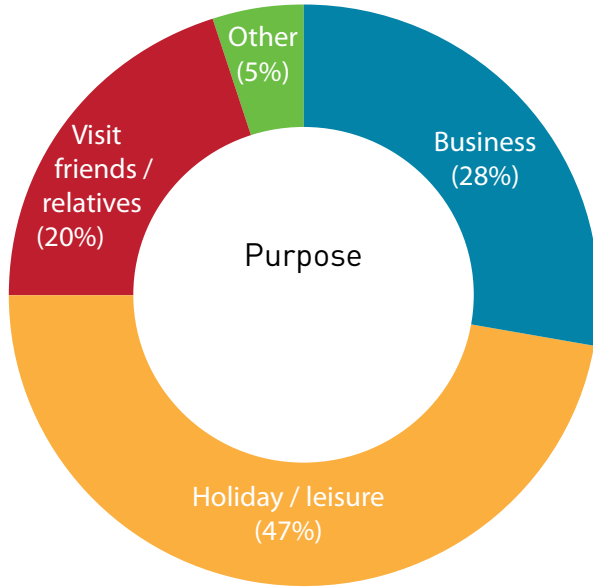
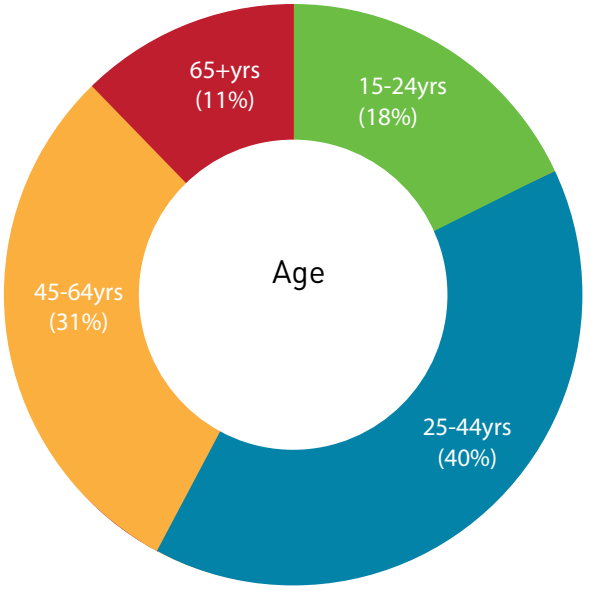
[^] Visitor estimates are based on Tourism Research Australia data March 2009 to December 2012 and supplemented with estimates from Evolve Solutions. Averages are based on four years (monthly) rolling annual estimates.

* WA's overnight visitors have increased steadily from 5.8M in 2010 to 7.5M in 2013 whilst visitor nights have increased from 46.1M in 2010 to 57.9M in 2013; The Mid West has not captured its share of WA's steady growth.

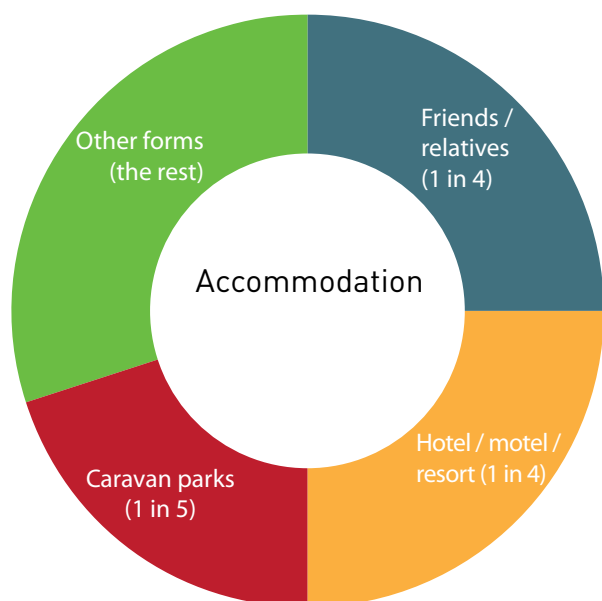
Mid West Domestic overnight visitors



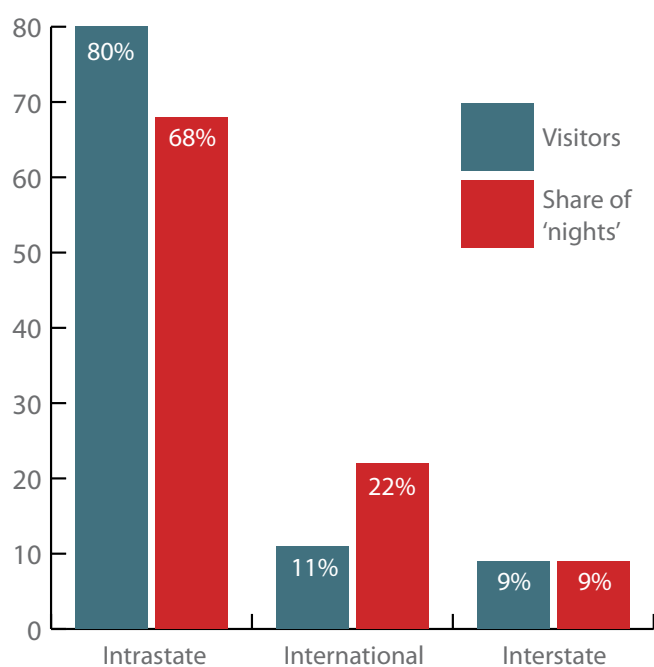
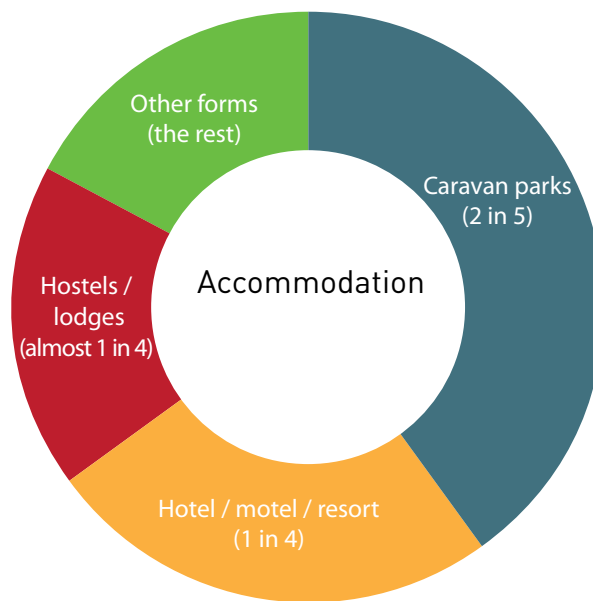
Mid West International overnight visitors



Mid West Domestic overnight visitors



Mid West International overnight visitors



In 2012 the Mid West hosted around 2.1M visitor nights. Intrastate visitors (80% of all visitors) generated 68% of the nights; interstate visitors (9% of all visitors) generated 9% of the nights; international visitors (11% of all visitors) generated 22% of the nights. Average length of stay was 4.8 nights for domestic visitors and 10.3 nights for international visitors.

The primary sources of information used in making travel decisions included friends and relatives, past travel experiences and holiday/travel websites and 'other' internet (e.g. blogs, forums, social media) with a minority using brochures and guidebooks.

19% of Mid West domestic overnight visitors are caravanners compared to the WA State average of 9%; 40% of Mid West international visitors are caravanners; and approximately 88,000 caravanners visit the Mid West annually. This group of visitors (approx. 25%) are highly mobile and disperse across the region.



Western Australian Museum, Geraldton

The following summarises visitation to the Mid West, compared to the other Development Commissions.

- The Mid West has among the highest percentage of intrastate visitors (80%) with only the South West (84%) and Wheatbelt (87%) being higher.
- The Mid West is among the lowest in interstate visitors (39,000), Gascoyne is the lowest (32,700), compared to the South West (141,000), which is highest.
- The Mid West is among the lowest in visitor nights (2.1M), with Gascoyne (1.7M) and Great Southern (1.7M) being the lowest, compared to the South West (6.0M).
- The Mid West is among the lowest in average nights stayed (5.1), with the South West (3.9) and Great Southern (3.9) and Wheatbelt (3.1) the lowest, and Pilbara (10.6) the highest (mostly because of the business market and high level of business visitors).
- The Mid West has a 'balanced' (i.e. sustainable) mix of visitors for business (25%), holiday-leisure (50%) and visiting friends and relatives (19%), similar to Goldfields-Esperance and the Kimberley.
- The highest in holiday-leisure + VFR visitors is the South West (89%) and Gascoyne (82%) compared to the Mid West 69% and the Pilbara (30%).

The Mid West has the potential to grow interstate visitation; encourage longer stays, especially among international and interstate visitors; and encourage more VFR and holiday-leisure visitors, as the following table indicates.



Point Moore lighthouse, Geraldton

2010/11/12 visitors	Mid West	%	Gascoyne	%	Pilbara	%	Kimberley	%	Goldfields Esperance	%	South West	%	Great Southern	%	Wheatbelt	%
Intrastate	331,300	80%	138,300	64%	236,000	70%	145,700	50%	249,000	74%	1,299,700	84%	359,300	79%	585,700	87%
Interstate	39,000	9%	32,700	15%	60,000	18%	111,300	38%	57,300	17%	141,000	9%	49,700	11%	52,700	8%
International	45,200	11%	44,100	20%	43,300	12%	35,600	12%	31,400	9%	105,000	7%	43,500	10%	36,800	5%
TOTAL VISITORS	415,600	100%	215,100	100%	339,300	100%	292,300	100%	337,700	100%	1,545,700	100%	452,500	100%	675,200	100%
Visitor Nights																
Intrastate	1,447,300	68%	1,168,300	66%	1,724,300	48%	826,000	33%	1,039,700	52%	3,921,000	65%	1,275,000	73%	1,430,000	69%
Interstate	201,000	9%	191,000	11%	699,000	20%	1,018,000	41%	386,000	19%	769,300	13%	168,700	10%	152,000	7%
International	467,800	22%	410,700	23%	1,158,600	32%	625,500	26%	585,600	29%	1,318,300	22%	310,800	18%	485,400	23%
TOTAL NIGHTS	2,116,200	100%	1,770,000	100%	3,582,000	100%	2,496,200	100%	2,011,300	100%	6,008,600	100%	1,754,400	100%	2,067,400	100%
Avg. length of stay (nights)																
Intrastate	4.4		8.4		7.3		5.7		4.2		3.0		3.5		2.4	
Interstate	5.2		5.8		11.7		9.1		6.7		5.5		3.4		2.9	
International	10.3		9.3		26.8		18.3		18.7		12.6		7.1		13.2	
TOTAL	5.1		8.2		10.6		8.5		6.0		3.9		3.9		3.1	
Purpose of Visit																
Business		25%		9%		62%		25%		31%		8%		11%		12%
Holiday or Leisure		50%		76%		21%		58%		35%		64%		56%		54%
Visiting Friends and Relatives (VFR)		19%		6%		9%		11%		23%		25%		27%		28%
Other		6%		8%		8%		6%		11%		3%		6%		6%

Source: Tourism Research Australia (TRA)

Consistent with Tourism Australia's 'Experience Seekers' and Tourism WA's domestic target market audiences, the following table profiles visitors most likely to visit the Mid West.[^] Recent research* suggests 5%-10% of intrastate visitors from each of the visitor segments are 'likely' to visit the Mid West in the next two years.

VISITOR SEGMENT	DEMOGRAPHIC	PROFILE	MOTIVATIONS
Dedicated Discoverers	Equivalent to 1 million consumers across Sydney, Melbourne, Brisbane and Perth. 42% have household incomes >\$100,000 pa 68% fall into the highest socioeconomic group based on income, education and occupation. 64% are big discretionary spenders.	A community minded and socially active group looking for something new and different. The highest socio-economic group with the highest frequency of travel. Big spenders on holidays and will pay a premium for new and authentic. Like undiscovered destinations so they can be first of their peers to visit.	Self development Adventure Engaged observation Motivating destinations: Broome, other North West, Ningaloo, the South West
Aspirational Achievers	Equivalent to 1.3 million consumers across Sydney, Melbourne, Brisbane and Perth. 39% have household incomes >\$100,000 pa. 47% fall into the highest socioeconomic group. 56% are big discretionary spenders. 46% have travelled by air in Australia in the last 12 mths. 83% like to holiday in Australia, 68% book their own travel. 41% are heavy internet users and 38% / 46% are heavy newspaper and magazine readers respectively.	This group have 'made it' in their chosen field. Frequent travellers but always look for a strong value proposition before making a decision. Spend big on holidays as a reward. Enjoy resorts, wine, food and activity based holidays. Look for a variety of experiences, prefer travelling to aspirational destinations.	Indulgence Relaxation Connection Variety Motivating Destinations: Broome, Margaret River and other South West, Ningaloo and Coral Bay
Grey Explorers	Equivalent to 1.1 million consumers across Sydney, Melbourne, Brisbane and Perth. 2% have household incomes >\$100,000 pa 94% are retired, 36% fall into the lowest socioeconomic group. 12% are big spenders, 27% medium spenders, 61% budget spenders. 29% recently travelled by air in Australia, 57% book their own travel. Low internet usage (9% heavy) but 44% and 34% are heavy newspaper and magazine readers respectively.	The oldest group, also known as grey nomads. Family is very important but their children have left home. Focus on relationships and experiencing what they missed out on. Have time to explore the country and reconnecting with loved ones. Travel in RV's and caravans and stay in low cost accommodation so they can travel longer. Spend time sightseeing and VFR.	Relaxation Connection Engaged observation Self development Motivating Destinations: Broome and other North West, South West, Kalbarri, Monkey Mia and other Coral Coast.
Family Connectors (WA-based)	Equivalent of 200,000 consumers in Perth. 27% have household incomes >\$100,000 pa. 36% are big discretionary spenders. 35% have travelled by air in Australia in the last 12 months. 76% like to holiday in Australia, 56% book their own travel. 48% are heavy internet users and 33% heavy magazine readers. 23% are heavy commercial radio listeners.	Conventional WA families. Devote a lot of effort into building home / lifestyle for their children. Holidays provide a chance to connect with their children-partners and enjoy all WA has to offer. Self-drive and rented accommodation and development of themselves and their children are important. Travel to traditional family destinations.	Variety Connection Relaxation Motivating Destinations: Margaret River and other South West (e.g. Busselton), Ningaloo
Experience Seekers (International)	Constitute 26-50% potential outbound travellers from key markets. Have higher than average household income, are tertiary educated. Experienced international travellers, not characterised by nationality, preferred holiday style or age. Seek out and enjoy authentic personal experiences; place high importance on value and critically balance benefits with costs.	Sociable and enjoy engaging with locals, enjoy a variety of experiences. Active in their pursuits, somewhat adventurous, value experiences different from their day-to-day lives. Open-minded, have an interest in world affairs, are opinion leaders within their peer and social groups. High users of technology, comfortable accessing information and messages in digital environments. Predisposed toward activities and pursuits that enhance them through understanding or learning.	Grow as an individual Being healthy Experience freedom Reconnect with family Self-discovery and education Motivating Destinations: National landscapes such as Great Barrier Reef, Uluru, Sydney, Margaret River and Ningaloo.

[^] Tourism WA Revisiting the Domestic Target Segments January 2014; Roy Morgan Travel Segments 2014; Tourism Australia Experience Seekers 2006, Tourism Australia Marketing the Experience Seeker 2007.

* Roy Morgan Holiday Tracking Survey April 2012 to March 2013. Refer also to the appendix for further details.

VISITOR MARKET OUTLOOK

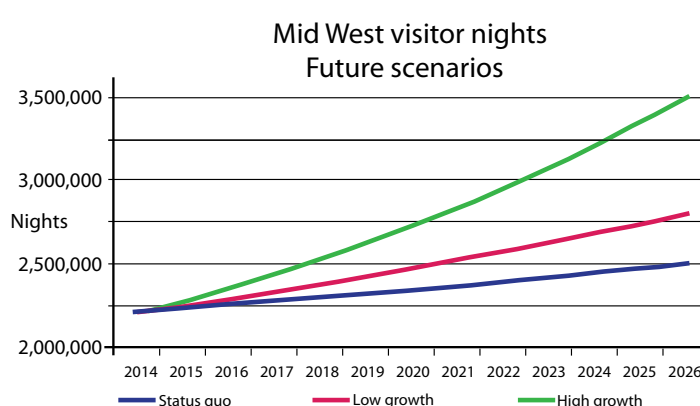
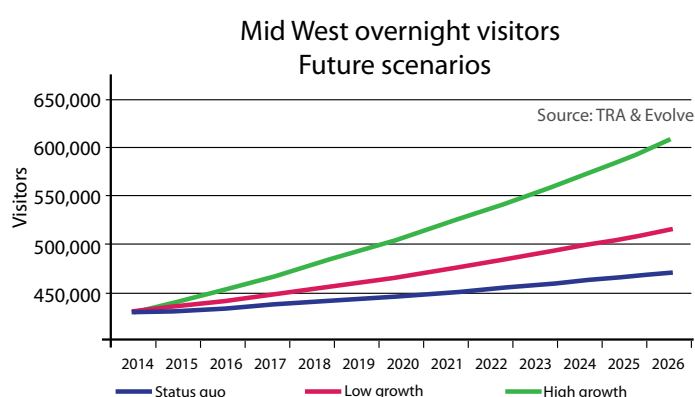
The Mid West offers a range of factors that motivate visitors to visit. The table below provides an indication of the extent to which the Mid West has leveraged these factors and where scope exists to increase the 'motivation to visit'. The extent to which some or all of these factors are developed will be instrumental in future visitation to the Mid West and the subregions.

CORE APPEAL – MOTIVATION TO VISIT	EXTENT LEVERAGED
Coastal and marine-aquatic environs	Adequate at Kalbarri, Port Denison and Geraldton. Abrolhos and 'quieter' coastal nodes largely undeveloped.
Outback wilderness and undisturbed nature	Many prominent landforms, natural features and bio-intensive sites are undeveloped or inaccessible.
Mining and pastoral heritage and local history	Adequate in regional towns. Several abandoned sites and places of historical interest are undeveloped.
Wide open spaces and uncrowded settings	Places of natural beauty, lookouts and locations with panoramic vistas are undeveloped or inaccessible.
Flora and fauna and natural bush scenery	Many accessible bio-intensive areas (e.g. rivers, creeks and waterholes) are undeveloped or inaccessible.
Ancient landforms, geological / mineralised areas	Many lesser known or overlooked sites remain undeveloped or inaccessible.
Arts and culture	Adequate in towns/galleries. Limited range of approved, accessible cultural sites.

Future visitation to the Mid West and the subregions is dependent upon a range of factors many of which are subject to change at short notice (e.g. A\$, interest rates, price of fuel, inflation, cost / risk of overseas travel, drought / floods, etc).

Visitor projections for the Mid West have been prepared based on aspirations within the Regional Blueprint (e.g. the high growth scenario for this strategy is consistent with 1,000,000 overnight visitors by 2050). A range of scenarios were developed as outlined in the following table with projected visitor levels shown graphically on the following page.

SCENARIO	ASSUMPTIONS AND RATIONALE
Status Quo	Minimal investment in tourism infrastructure; minimal addition to activities / experiences offered; minimal regional collaboration; fragmented promotion / branding prevails; accommodation constraints and seasonal shortages prevail; transit tourism continues, minimal growth in self-drive stopovers; minimal 0.72%p.a. growth in overnight visitation (average).
Low Growth	Low levels of investment in tourism; minor addition to activities / experiences offered; low levels of regional collaboration; regional promotion / branding emerges; minor increases in high and low priced accommodation capacity; self-drive stopovers increase, higher dispersal across the region; low-moderate 1.48%p.a. growth in overnight visitation (average).
High Growth	Moderate levels of investment in tourism; noticeable increase in activities / experiences offered; moderate levels of regional collaboration; effective regional branding / promotion; moderate increases in accommodation capacity, across the region; increased visitation and length of stay across the region; moderate-high 2.38%p.a. growth in overnight visitation (average).



2.3 TOURISM AUDIT

For each of the subregions a desktop-based tourism audit investigated the number and type of activities, attractions and accommodation. A primary purpose of the audit was to identify gaps in tourism product and infrastructure. Audit findings are based on information taken from websites, holiday planners, brochures, maps and travel guides. The findings for each subregion highlight the gaps, challenges and opportunities. Audit data is presented in the appendix.

BATAVIA COAST TOURISM AUDIT FINDINGS

In the heart of the subregion, 420 km north of Perth is Geraldton, the departure point for air and sea-trips to the Abrolhos Islands (lying approximately 60km west of Geraldton). The subregion has over 170 accommodation facilities, the vast majority of which are holiday homes and units. Coastal caravan parks provide a large proportion of accommodation capacity with a limited amount of farm stay and hotel-motel accommodation inland. Higher-end resort style accommodation is limited to Kalbarri and Geraldton, with some of the smaller towns providing aged hotel-motel accommodation as an alternative to limited caravanning-camping capacity.

Access to the region is year round on all-weather sealed roads, typically 4.5 hours drive from Perth. Geraldton is included on the 'official' route map of the Indian Ocean Drive (IOD), but Port Denison and Dongara are not. The subregion has regular (daily) air services through Geraldton regional airport and a limited-service airstrip at Kalbarri. Regional buses service most of the towns along the Batavia Coast on a regular basis with tour coaches confined to the larger towns.

There is a range of visitor activities involving mainly nature based walks, adventure and aquatic activities. Sporting activities are also available with a range of high quality facilities in the larger towns. Activities involving the history and industry of the subregion are limited. There are 17 heritage attractions promoted in the historic towns and buildings of the subregion, but most involve static displays and basic interpretation with limited guided and/or interactive tours.

Events in the subregion provide 'temporary' tourist attractions of limited appeal, while the nature, culture and food of the subregion support a limited offering of tourist attractions. There is a mismatch between the major attractions, which are mainly historical-heritage, and the major activities which are based mainly on natural attractions and land features.

Awareness is promoted through websites hosted by the Shires, Visitor Centres and TWA and supplemented by Holiday Planners of Australia's Coral Coast, Geraldton and Kalbarri that are available online as well as in hard copy though the Visitor Centre network. Walk and drive trail maps highlight some of the historic and natural features of the subregion, with some walk and drive trails more heavily promoted than others.

Gaps

- Tourism service standards are inconsistent and at times below comparable 'aspiring' destinations.
- Visitor servicing is mostly confined to visitor centres and is largely reliant on visitors going to the visitor centres (which are open 9am to 5pm).
- Tourism signage is generally adequate around the larger towns while away from the coast it can be inconsistent and/or lacking.
- Accommodation capacity is limited and mostly services the business sector, while caravanning-camping is mostly confined to caravan parks in urban areas.
- The subregion is a popular transit route for self-drive travellers and yet overnight stopover facilities are limited, undeveloped or discouraged.
- Self-drive tourism is the largest visitor segment yet drive trails, drive-itineraries and way finding[^] are not yet fully developed.
- Mid West has a large Aboriginal population yet Aboriginal tourism is almost non-existent and programs to foster new ventures are under-utilised.
- The subregion has over 300km of coastline and limited camping-caravanning facilities on the coast, yet visitors go there daily for aquatic activities.
- The Abrolhos Islands have under-utilised fishing huts, 'village' amenities and eco camping sites yet overnight and day visits are limited in number.
- Trail-based tourism is growing steadily across WA yet the subregion has a limited range of trails, mostly at selected sites and at some natural features.
- The burgeoning RV sector has failed to impact upon the region with a limited range of amenities-facilities for freedom campers and self-contained travellers.

[^] Way finding is how visitors apply information to find and/or arrive at a place of interest with minimal delay using the most direct or preferred route; it can include the use of maps, GPS, signs, markers, word-of-mouth instructions, web / app utilities, visual indicators and past experience; good way finding ensures visitors spend maximum time at a site (activity-experience) thus minimising cost, travel time and risk.

Challenges

- Shires in the subregion have been LGA-centric in managing tourism and subsequently view neighbouring shires as competitors, with minimal collaboration across boundaries, rather than utilising each Shire's capacity to extend the length of stay, increase expenditure or encourage repeat visitation.
- The subregion hosts excellent Vocational Education and Training (VET) facilities but achieves comparatively low levels of tourism training, and with the subregion's above average employment participation and below-average unemployment, tourism operators have difficulty recruiting quality staff⁵ to facilitate the growth of tourism. State / Federal government intervention may be required to incentivise VET enrolment in tourism-hospitality and/or encourage mature-age (unemployed, casual employee) residents to reconsider upgrading skills in tourism-hospitality.
- LGA-centric tourism has fostered 'town-destinations' in visitors minds, resulting in fragmented branding across the subregion, to the detriment of having a regional identity to compete with formidable regions (e.g. Shark Bay, Ningaloo, Margaret River, Goldfields, Kimberley). Batavia Coast branding could be improved by including Jurien, Green Head and northern sections of the Indian Ocean Drive (IOD); making coastal access, activities and experiences the basis for a stronger proposition; and utilising inland linkages to enhance the range of visitor experiences on offer.
- The subregion hosts two fishing-tourism towns (i.e. Kalbarri and Dongara-Port Denison) and a port-industry-fishing regional city (i.e. Geraldton), which are fundamentally different in their tourism capacity, profile and appeal creating challenges for subregional branding. Sub-branding of the towns has merit provided cross-town collaboration is encouraged in daytrips, drive routes, tour operators, accommodation sharing, governance, planning, etc.
- The subregion's hinterland is host to scenery, niche ventures, quaint communities and natural attractions yet is largely overlooked and under developed as a destination for day trips. The hinterland's accommodation capacity, hospitality services and RV amenities are limited and restrictive.



Dongara sand dunes

⁵ Western Australian Regional Profile Mid West-Gascoyne, June 2012, The Department of Training and Workforce Development. Mid West Gascoyne Profile. <http://myregion.gov.au/profile/mid-west-gascoyne/data/employment/unemployment>

- Investment is required to provide greater choice for self-drive travellers who are self-contained; and accommodation options enhanced for those not self-contained (e.g. by encouraging increased supply of farm stays, B&B's, rental holiday homes, refurbishment of disused facilities, increased supply of park homes/cabins, rezoning for mixed use, etc).
- Geraldton is the regional city and yet has a limited range of high quality accommodation; has limited affordable seafront accommodation; has limited budget accommodation; has only 2 caravan parks by the beach, and caravan park fees are comparatively expensive; Geraldton is not RV friendly; basic camps are limited in number and not widely advertised or sign-posted; no 24-hour free parking within 100kms of Geraldton; and the City needs more serviced accommodation, Bed and Breakfasts and Retreats (e.g. day spa, health-wellness); In the event of an upsurge in mining-resource activity (especially construction) the City's accommodation supply would be overwhelmed to the detriment of tourism and potential growth therein.
- The Mid West and in particular the subregions have limited tourism data to manage tourism and inform decision making. It is important that the Mid West and the subregions commence a program of tourism data collection and reporting that over time will provide a richer understanding of trends to inform future plans and strategies. National or State tourism data should become secondary to the primary data gathered within the region.
- The Batavia Coast could potentially extend from Jurien Bay to Kalbarri. However, the section from Jurien Bay to Green Head is not within the Batavia Coast boundary. Green Head currently lies within the North Midlands whilst Jurien lies within the Shire of Dandaragan and the Wheatbelt Development Commission. Coordinated development of tourism along the IOD from Jurien Bay to Port Denison would require a change of Development Commission boundaries. If opportunity to realign boundaries should arise it would be beneficial to include Jurien and Green Head in the Batavia Coast for consistent marketing and development.

Opportunities

- Encourage investment in and development of mixed accommodation; for example, serviced apartments, B&B's, farm stays, backpacker / flashpacker (i.e. up market) lodges, coastal caravan park and a high quality resort-hotel.
- Encourage the development of a conference-function facility in Geraldton, ideally colocated with a hotel-resort facility or within a hospitality / service oriented precinct (e.g. WA Museum Geraldton, Batavia Marina Stage Two).
- Encourage the development of tours, visitor services, guides, hires / rentals and cultural activities; increase the range of experiences available to visitors.
- Develop a wider range of tour options and shore-based activities for cruise ship passengers; offering cruise ships a wider range of options in hospitality, transport, activities-experiences, tour duration and tour themes (e.g. food, culture, heritage, industry, nature, astronomy).
- Develop a mix of accommodation options at the Abrolhos, across the broader spectrum of amenity and price / quality, offering a wide range of visitors the chance to experience the natural wonders of the islands.
- Develop additional infrastructure at Kalbarri National Park including an iconic 'skywalk' lookout, nature based eco camp, visitor's campground, additional walk / hike trails and the completion of upgrades to roads into day use areas.
- Encourage increased access to coastal day use sites and develop coastal short stay campsites; develop linkages between sites where possible.
- Continue to encourage the development of Geraldton's West End precinct including a range of entertainment, hospitality, cultural and social activities and services.
- Develop a coastal link between Kalbarri and the Shark Bay World Heritage Area; encourage a 4WD trail incorporating overnight rest areas, lookouts, picnic areas, walk trails and visitor amenities.
- Encourage half/full day self-drive routes into the hinterland by providing detailed maps, signage/markers, prominent stopovers and interpretive materials;
- Encourage the development of Aboriginal guided tours, hospitality / food experiences, cultural displays / talks and art-craft exhibitions / displays.

MURCHISON TOURISM AUDIT FINDINGS

In this instance, the 'Murchison' subregion includes the Shire of Upper Gascoyne, which is in the neighbouring Gascoyne region. The term 'Murchison' refers to 8 LGA's working together.

The Murchison subregion comprises eight shires, seven towns, 4,500 residents, and covers approximately 423,000km². Towns within the Murchison are mostly transit points for travellers' enroute to farther destinations as the region itself is largely undeveloped as a tourism destination.

The Murchison has over thirty-five accommodation facilities, mostly aged establishments of mixed quality and standard along with a limited range of low-cost or free camping sites. Access is primarily by sealed road-highway between the main towns, with a network of unsealed roads across the region, along with three regular-service airports in the larger towns, numerous airstrips for small aircraft (e.g. some for RFDS) and regular public bus-coach services in four towns.

The region is host to over twenty-seven visitor activities, mostly heritage, nature and trail based, albeit with a high degree of sameness from one town to the next. The region is host to forty-one attractions, mostly heritage, nature and culture-Aboriginal based, and these are generally within proximity to each town. Using the CMCA's RV Friendly Town scheme as a benchmark, the region's amenities are generally limited to basic facilities with the exception of Meekatharra, which is a certified RV Friendly Town.

Awareness is driven mostly through two mediums including printed holiday planners produced by the AGO, ACC and RAC and LGA tourism brochures, whilst tourism, self-drive and travel websites offer limited details on stopover towns and LGA websites provide details on local attractions, activities and accommodation. Four of the towns have visitor centres whilst the remainder have information nodes in Shire offices or CRC's.

Gaps

- Boutique scale hotel-motels or upmarket lodges-hostels suited to short stay families, couples and small groups.
- Formal campgrounds on DPAW, Station, Shire or freehold land to suit self-contained visitors and self-drive travellers' enroute and seeking extended stays.
- Overnight (24 hour) rest areas in-near towns, at roadside parking bays and / or near day use sites to accommodate travellers and self-contained visitors.
- A wider variety of nature based activities and attractions (e.g. billabongs, waterholes, fossicking / prospecting sites, wildflower sites, lookouts, short-loop drive trails, walk-bike trails, geo cache trails, shaded picnic sites, cave / breakaway sites, Aboriginal art sites, geological / land feature sites, fauna viewing sites, mine viewing areas / lookouts and river-creek confluences). Many of these opportunities exist on pastoral and DPAW land.
- Increased access to prominent landmarks, natural landforms and geological features enhanced with walk trails, lookouts, interpretation and shaded rest areas.
- Improved range and quality of information for visitors including half / full day itinerary options, store-hospitality operating hours, location of / directions to feature sites, recommended 'must see' attractions, safety information, recommended drive / 4WD trails and the location of RV-camper amenities.
- Suggestions for stopovers enroute to the region, including stopover accommodation and 'must see' feature sites / places of interest.
- Enhanced range of RV / camper amenities in or near to the towns.
- Detailed list of station stays within the region including on-site facilities, tours, accommodation and hospitality; readily available on multiple mediums.
- Marked locations of low-cost / free camp sites and dog-friendly destinations across the region.



Meekatharra sunset

Challenges

- A limited amenity for RV and self-drive travellers presents challenges to those potentially looking to rest-up or stopover between towns, discouraging visitors to lengthen a visit. Town amenities could be upgraded to meet CMCA RV Friendly Town standards or improved to better support RV travellers.
- The Outback Pathways (GMOP) is poorly maintained and attracting low patronage. Travellers of the GMOP are potentially sending unfavourable messages of the trail, which can lead to lower appeal for the region. Periodic maintenance is required to ensure the GMOP remains relevant to travellers.
- Built accommodation is generally aged, of a mixed standard and attuned to servicing miners or workers rather than tourists. Station stays, B&B's and boutique-size lodges-hostels need to be encouraged and actively promoted to catch a larger share of visitors.
- Hospitality such as cafe-restaurant-food suppliers are limited in number, have varied operating hours and generally not attuned to servicing tourists.
- The vastness of the region and the distance between towns requires a fair amount of driving yet the reliability of printed maps and GPS is limited and fail to show the location of attractions, activities, amenities and accommodation options – leaving travellers to explore the region unsure if they're driving past something of importance.
- The towns share a 'tourism monoculture' offering a 'sameness' of visitor experiences centred on heritage attractions notably architecture and town heritage walks, historic mining sites, heritage transport exhibits, photographic collections and hotels-pubs. Town differences need to be highlighted and reinforced.

Opportunities

- Helping to facilitate fossicking–prospecting in designated areas using maps, signage, providing information on licenses and permits, facilitating guides or tours during peak periods, and hiring metal detectors. This may include establishing 'prospecting reserves' operated by the local Shire.
- Encouraging Aboriginal artists to display their wares in town (e.g. windows of vacant shops, foyer of shire office, visitor centre and CRC) with clear instructions on where to enquire about buying art (e.g. at the Shire, visitor centre or CRC).
- Using blackboards / whiteboards outside the visitor centre to update travellers of recent happenings such as flooded lakes attracting birds, location of lookouts to view a rising full moon, types of fauna spotted at certain places, gems-metals found at certain places, waterholes available for swimming, seasonal campsites opened / closed, dates-times of social events/gatherings at local clubs, places-venues where locals patronise on certain days, etc to help show the region has ever-changing features and spontaneous appeal.
- 1-in-3 RV-travellers consciously avoid caravan parks. Creating places for RV/self-contained travellers to stay for 2-4 days at low or no cost; and providing information encouraging RV'ers to engage with local communities, clubs and regional gatherings and to purchase local food and services.
- Encouraging hospitality operators to adopt 'welcome' programs during peak visitor periods (e.g. for 3-4 months of the year) and offer localised information, support-on-request, visitor-friendly service and recommendations for day trips / site visits / sightseeing etc.



4WDDriving in the Mid West

- Enhancing existing walk and drive trails with maps-handouts, trail markers, directional signage, geo caches, shaded picnic sites and bike-loops around nearby places of interest.
- Each town offering visitors a postcard size handout listing the top five must-see attractions-activities with a map showing their location on the reverse side (and each town ensuring their offering is distinct and different from neighbouring towns).
- Preparation of a Murchison holiday planner that guides visitors across the region, in-around towns and in-between towns and provides travellers with a compendium of itineraries, options and opportunities to stop, stay and experience the region that are otherwise overlooked (i.e. including places frequented by locals).
- Encourage pastoralists with short stay accommodation (e.g. buildings or campsites) to package their station by listing the available attractions, activities and experiences with local visitor centres and combine all station stays in a regional compendium that enables travellers to view alternate places on a map, comparing experiences on offer, prices, location, travel distance, facilities, etc.
- Refurbish and/or redevelop disused Shire-owned buildings such as schools, hospitals and halls as upmarket accommodation for families, solo travellers and small groups.

NORTH MIDLANDS TOURISM AUDIT FINDINGS

The Northern Midlands comprises six shires, seven towns, 4,583 residents, covers approximately 23,269km² and is predominantly a farming and mining region three hour's drive north of Perth. Towns within the Northern Midlands are comparatively short distances apart along two sealed roads that take travellers north into the Gascoyne or south towards Perth.

The region is highly regarded for its wildflower displays July to September and it is during this period that peak visitation and accommodation shortages occur. The Northern Midlands has around forty accommodation facilities with over half being caravan parks, cabin facilities and camp sites, and supplemented by a hotel-pub in each of the seven towns. The region has a limited range of camp sites.

Access is primarily by sealed roads that are all-weather and serviceable year-round. The region has several landing strips for small, light aircraft but no facility for larger, regular-service aircraft. Public bus-coach services pass through most of the towns with links to Geraldton and Perth.

The region is host to over forty visitor activities, mostly nature, wildflowers, walks and self-drive trails, art-culture and marine-aquatic based activities that potentially support a day's stay in each town. The region is host to over 109 attractions mostly heritage, nature, events, art-culture and industrial tourism with each town having a range of attractions within a short drive capable of supporting a day's stay.

Using the CMCA's RV Friendly Town scheme as a benchmark, the region's amenities are generally limited to basic RV-traveller facilities with the exception of Three Springs, Mingenew and Arrino, which are RV Friendly Towns.

Awareness is driven mostly by two mediums including printed holiday planners produced by the AGO, ACC, RAC and Wildflower Country and the LGA tourism brochures. Travel-tourism and self-drive websites offer limited details on the towns whilst the LGA websites provide further details on shire-specific attractions, activities and accommodation. Four of the towns have visitor centres, opened seasonally, whilst the remainder have information nodes in Shire offices or CRC's.



North Midlands farmland

Gaps

- A limited supply of quality accommodation will be preventing high yield visitors from staying overnight, from participating in packaged tours or extending their stay in the region.
- During the wildflower season July to September there is a high level of repeat visitors, especially over 55 years of age. There are significantly fewer young families, international travellers or short-stay holidaymakers, especially outside the peak season.
- If visitation grows there will be a shortage of accommodation and a lack of choice in food-hospitality options. Alternatives need investigating such as lettable homes, disused dormitories/hospitals/lodges, increase in park cabins/chalets and increased access to BBQ facilities, camp kitchens and community club facilities-hospitality, farm stays.
- Inconsistency of town amenities, visitor services, RV facilities and visitor information across the North Midlands making the towns appear incongruous to tourism, which is potentially a barrier for impromptu stopovers.
- There are indications that locals patronise a range of sites/places with friends and family and many of these places are not well signposted and/or not included in visitor information, making the attraction of otherwise small towns less appealing as a short stay stopover destination.
- Windows of disused shops and offices could potentially be used to display art/craft, installations, displays-exhibits or curios to 'liven' up the appeal of the towns.
- Limited supply of amenities and facilities to attract and engage families (i.e. with children) such as mountain bike trails, hands-on activities, learning – discovery opportunities or creative-inspirational experiences.

Challenges

- Peak visitation July to September brings high utilisation of the region's accommodation capacity contributing to shortages in van-camp sites and/or rooms that will be discouraging first-time and repeat visitors.
- Self-drive routes, attractions and activities are potentially bringing people to the region however there is a limited range of places to stay and limited places to eat. Alternative approaches such as BBQ picnic sites, camp kitchens or farm stays specialising in gourmet food / cuisine experiences may be required, ideally encouraging the use of local-regional produce (e.g. lamb, lobster, fish, fresh produce, olive oil, etc).
- The Wildflower Country holiday planner identifies a range of places to visit (and some of these will be signposted from the towns), however, the Planner does not have all the identified places shown on a map and the Planner provides no directions to some of the places mentioned. Travellers with GPS, maps and guidebooks may discover they are unable to find places of interest even though they are identified in the Planner.
- Wildflowers are seasonally dependent on rainfall, sunshine and accessibility and this can give rise to good / bad years for visitor experiences. Supplementing the visitor experience with activities and amenities that enable visitors to enjoy the region with / without wildflowers will be critical in sustaining tourism. For example the Artbelt project, walk-bike trails, camp grounds, mine tours, heritage trails and conservation initiatives and improved amenities at known local natural features.



Morphett Park boat launching facility, Green Head

Opportunities

- Encouraging development of high quality farmstays, B&B's, self contained chalets or boutique-scale hostels / lodges to host high yielding travellers during the wildflower season and potentially some of the mining-resource visitors during the remainder of the year.
- The Wildflower Way and Midlands Road self-drive routes need promoting as a daytrip or a two-day overnight 'loop' from Perth travelling up the Wildflower Way and back via the Midlands Road, with a range of attractions / experiences on a self-guide map with details provided for each potential stopover.
- Enhance existing walk and bike trails with the addition of activities and amenities such as shaded rest stops, geo cache sites, lookouts, picnic sites, overnight huts, water points, designated pick-up / drop-off points, flora viewing sites, trail markers and interpretive-directional panels. Potentially making the trails an overnight experience for adventure travellers and enthusiasts, especially May to October when southern areas of the State are cooler.
- Encourage travellers to stop for a few hours or stay overnight and increase expenditure in the region by developing and / or promoting picnic sites, geo cache trails, walk-bike trails, 4WD tracks-trails, group camp sites (e.g. like those at Lake Indoon), overnight rest areas or designated flora viewing sites.
- North Midland Shires are working on a range of sustainability initiatives that could potentially become a unique difference for the region and lead to special interest tourism via nature and environmental sustainability, hosting guest speakers, researchers, research programs for volunteer tourists, small conferences, community pilot programs, field days or an event linking sites and programs. These need to be actively pursued, ideally in partnership.
- DPaW's proposed upgrades to the 'Karara Block' will provide a significant addition to the regions capacity to attract visitors outside of the wildflower season, for example, for flora-fauna appreciation, walk and bike trails, camping, bird watching, 4WD'ing and weekend getaways.
- Mine tourism could emerge as a supplementary attraction and could possibly include a range of tours, lookouts, interpretive experiences and displays, ideally bringing a year-round attraction to supplement other non-wildflower themes.
- Artbelt; priority could be given to projects that will impact on the 5-A's of tourism such as events based art initiatives, interactive family activities, sculpture park or playground, street furniture, land art or recycled art signs and ideally towns along the Midlands and Mullewa-Wubin Roads having Artbelt initiatives.
- Moving towards CMCA's RV Friendly Town status for all towns across the North Midlands by upgrading amenities and facilities for RV travellers. Overnight areas for RV'ers can include parking bays at race tracks, ovals, recreation clubs and sporting grounds with a 2-4 day stay limit.



Exploring Wildflower Country, Morawa

SUMMARY. SITUATION ANALYSIS

The situation analysis highlighted a range of factors influencing tourism in the Mid West. Key points are summarised below.

- The three subregions have their own uniqueness and are at different stages in their tourism lifecycle; historically the subregions have competed as destinations with varying features and appeal, seasonal differences and infrastructure constraints; sustained growth in visitation has been low and patchy.
- The region has identifiable markets and niches to capture; collaborative approaches to tourism have potential to significantly improve the region's competitiveness.
- The Mid West can differentiate itself based on geo tourism, unique nature based tourism,[^] self-drive routes, island eco tourism and Aboriginal tourism. These different 'appeals' have potential to deliver an impressive variety to discerning visitors.
- DPaW's extensive conservation estate is being enhanced with tourism infrastructure; stations and farms are warming to tourism as a supplementary activity; regional towns are becoming RV Friendly; and the Indian Ocean Drive is becoming a popular scenic route;
- Similar to the Mid West, competing destinations have seasonal capacity constraints; Ningaloo and the Kimberley are near capacity June to August; the mining-centric Pilbara has limited tourism infrastructure and visitor capacity, and relies on niche facilities (e.g. Karijini, Millstream-Chichester); the Goldfields-Esperance are developed tourism destinations with periods of high demand as well as being susceptible to economic cycles (i.e. impacting on accommodation supply).
- Australia's projected increase in the over-65yo age group of 2.0M (i.e. 2013 to 2028) and the 'silver tsunami'; Australia's 20,000+ new RV's annually, 500,000 registered RV's across Australia and 80,000 RV's on the road at any one time; this sector is highly organised and growing strongly and the Mid West is well placed to capture a larger share of this market.
- Strong growth in self-contained travellers and RV's, and many are 'tech-savvy' in using social media and internet forums to influence their routes, destinations, stay and spend.
- A mixed outlook for tourism during 2014-24. Moderately high A\$, high-cost domestic holidays, slow-steady rise in household disposable incomes, favouring overseas holidays; In 2013, 50% of Australia's overnight domestic visitor spend occurred in regional areas and this will continue to increase; Australia's international visitor numbers are expected to increase 40% from 6.6M in 2013 to 9.3M in 2023 with 60%+ return visitation, including visitors favouring destinations steeped in eco nature and a gourmet food focus.



Canoeing, Kalbarri Gorge

[^] For example, astronomy and the SKA, rain events and the flooding of vast catchments, conservation of former pastoral-farming lands, rich wildflower belts and science-driven fauna rehabilitation.

SECTION 3 – REGIONAL TOURISM DEVELOPMENT

3.1 GOALS

The long term goals for the Mid West Tourism Development Strategy are to achieve:

- 1,000,000 overnight visitors and 616,000 day trip visitor's p.a. by 2050;
- 5,000,000 visitor nights p.a. by 2050;
- \$544,000,000 p.a. overnight visitor expenditure and \$67,000,000 p.a. day trip expenditure by 2050;
- 988,000 day-trip and overnight visitors by 2025; and
- Sustainable long term growth in overnight visitation of 2.38% p.a. and 1.84% p.a. for day trip visits (avg).

3.2 STRATEGIC AIMS

To grow tourism across the Mid West the strategy aims to addresses five key areas including:

1. Increase accommodation capacity from camping through to resorts

Significant development options include develop coastal nodes – coastal campsites, Port Denison Hotel-Resort, Batavia Marina Hotel-Resort and conference facility, DPaW campgrounds, station/farm stays, overnight rest areas, refurbished heritage / disused buildings, additional cabins within LGA-owned caravan parks, and encouragement of B&B's, holiday homes, lodges and backpackers / flashpackers.

2. Open up sites and places previously overlooked or under-developed to enhance the Mid West's appeal as a destination

Significant development options include geo park sites, prospecting sites, wildflower rich sites, river-creek confluence sites, natural lookouts, walk-bike-4WD trails, flora-fauna rich sites, camp sites, unique landform sites for day use / overnight stay (e.g. Peace Gorge, The Granites, Irwin River crossing), heritage sites and (approved) cultural sites.

3. Improve the quality and distribution of information for pre-trip planning and way finding

Significant development options include an interactive map / App, map-centric tourism brochures and holiday planners, more directional signage to popular sites, promoting GPS coordinates of key sites, listing key sites on Google Maps, establishing information nodes in shops/outlets across towns, stronger emphasis in Planners of itinerary / route options for pre-trip planning, stronger emphasis on day trip options, recommending places to stopover and for accommodation while enroute to the region, wider use of web links connecting LGA/ Town websites, and web downloads of information specifically for pre-trip planning and post-arrival planning.

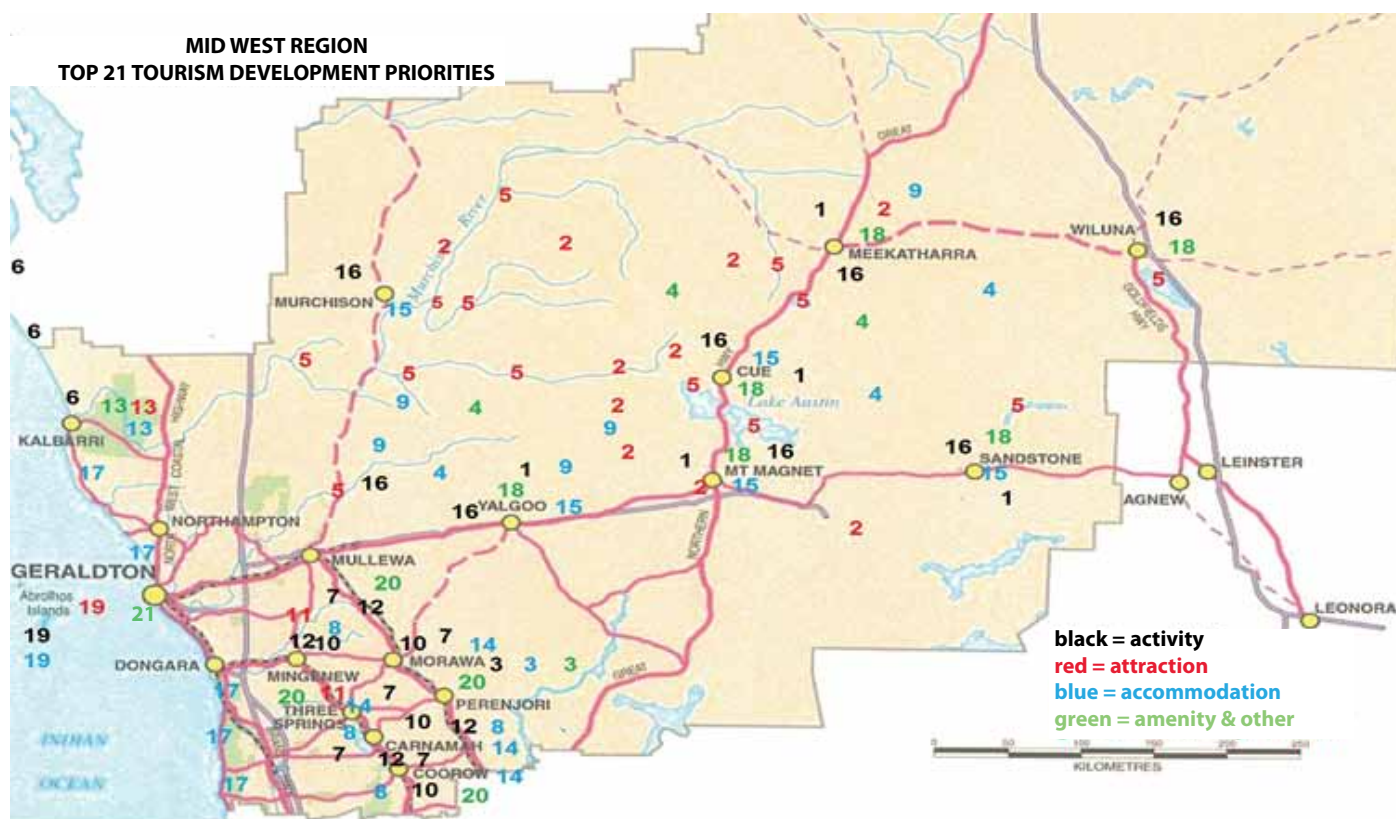
4. Attract more high-yield visitors and the growing self-drive and RV market

Significant development options include a hotel-resort at the Wallabi Islands, eco-camp experience at the Abrolhos, hotel-resort at Batavia Marina, continued development of Geraldton's West End cultural precinct (i.e. culture, hospitality, art), conference-event facility in Geraldton, hotel-resort in Port Denison to complement the conference facility, steady increase in regional foods / cuisines in local venues, packaged tours / holidays incorporating the Abrolhos, Kalbarri, Geraldton, Dongara and the Wildflower Country, a larger range of up-market station stays, and RV Friendly Towns across the entire Mid West.

5. Increase the range of eco nature based activities, attractions and experiences

Significant development options include 'open up' the Abrolhos Islands, finish upgrading Kalbarri National Park, establish the Zuytdorp Coast 4WD trail, upgrade DPaW's Karara and Murchison 'blocks, establish sites to view 'flash' events, establish a geo park in the Murchison, establish coastal nodes for day use and overnight stay, upgrade walk and bike trails at flora / feature rich sites, encourage pastoralists / farmers to open up unique sites as day use areas, and encourage wider promotion of drive routes / drive trails to nature based day use sites.

The top 21 development priorities are spread across the Mid West as shown below. Some priorities occur at more than one site (e.g. geo parks (no 2) shown nine times across the Murchison). The numbers correspond to those listed in the REMPLAN analysis in Appendix F.



- | | |
|--|---|
| 1 Prospecting reserves | 12 Interactive Artbelt project installations along Mullewa-Wubin and Midlands Road |
| 2 Geo tourism across the region | 13 Kalbarri NP - seal roads, iconic skywalk, naturbank eco camp, campgrounds, facilities |
| 3 DPAW's Karara block tourism facilities | 14/15 Develop cabins / chalets at Shire owned caravan parks |
| 4 Pastoral property tourism infrastructure | 16 Upgrade amenity of existing walk trails |
| 5 Lookout and safe viewing sites for flash events | 17 Coastal campsite and visitor node development |
| 6 Kalbarri to Shark Bay 4WD trail | 18 Repair and refurbish selected heritage buildings for tourism use |
| 7 Half and full day self drive routes with rest and overnight areas | 19 Abrolhos Islands eco tourism amenities |
| 8 New eco campgrounds | 20 Mobile phone network upgrade |
| 9 DPAWs three Murchison blocks tourism facilities | 21 Geraldton conference centre / business event hub |
| 10 Upgrade selection of trails to multi use | |
| 11 Create wildflower self drive loop along Wildflower Way and Midlands Road | |

*Refer to Appendix E for further information and details on REMPLAN data.

3.3 REGIONAL TOURISM DEVELOPMENT PRIORITIES

A primary objective of the Mid West Tourism Development Strategy was to “identify tourism opportunities, game changers, priorities and gaps for the Mid West to inform future development and investment.”

An extensive list of potential investment and infrastructure development opportunities informed the desktop study, consultation and analysis phases of the project culminating in a short list of recommended priorities for each subregion. The recommended development priorities were identified based on the following steps.

1. 50+ development options were identified by MWTA, MWDC, desktop analysis and consultations.
2. The development options were assessed on social, environmental, financial and economic criteria; preliminary assessment against gaps, competition, opportunities and trends; approximately 10-12 options were identified for each subregion.
3. Subregional workshops ranked the top 10-12 development options for each subregion. Feedback from the MWTA and the MWDC highlighted regional preferences.
4. Further assessment against gaps, opportunities, trends and competition identified the top five options for each subregion.
5. The Mid West’s top 21 development options were assessed economically using REMPLAN (see Appendix E for details). Preliminary ranking was based on net benefit and benefit-cost ratio.
6. Final ranking was based on economic ranking (i.e. Benefit-Cost ratio and Net Benefits) and the response to gaps, opportunities, competition and trends.
7. The top six development priorities for the Mid West and the top five priorities for each subregion were identified.

The top six regional tourism development priorities for the Mid West include the following.

1. Develop the Abrolhos Islands maritime history and nature based experiences.
2. Develop Kalbarri national park by adding an iconic ‘skywalk’ lookout, sealed access roads, a naturebank eco camp, public campground and trail upgrades.
3. Develop five coastal campsites and day use visitor nodes from Green Head to Kalbarri.
4. 4WD trail along the Zuytdorp Coast linking Kalbarri to the Shark Bay World Heritage Area.
5. Develop tourism-recreation infrastructure across four of the Department of Parks and Wildlife’s conservation blocks (i.e. Karara, Muggon, Doolgunna-Mooloogool and Dalgarranga).
6. Develop geo tourism and a geo park in the Murchison.

The top six regional development priorities are outlined below including a brief overview of the business case (i.e. underlying rationale). The results of a preliminary economic analysis using REMPLAN are presented in the appendix for each development priority.



Snag Island Pier, Leeman

1. ABROLHOS ISLANDS

The Abrolhos Islands are potentially a significant drawcard for visitors to the Mid West – a potential ‘game changer’ for the region. The Abrolhos can offer a diverse range of iconic experiences including:

- Snorkelling in coral-lined ‘sinks’ home to fish, lobster, reef sharks and shells and over coral-covered atolls/anemones viewing schools of prized table fish;
- Beach/rock fishing into deep trenches (i.e. drop-offs);
- Canoeing, kayaking and stand-up-paddle boarding over shallow coral coves viewing marine life, coral, shells, etc;
- Swimming in coral-enclosed bays and coves, in warm tranquil water;
- Viewing colonies of birds on remote headlands and isolated shores;
- Spotting whales, sharks and large marine life in open waters;
- Diving on wreck sites including the Batavia and others; and
- Experiencing the many different types of fishermen’s huts, jetties and structures that help make up the Abrolhos Islands ‘village’.

An immediate challenge is to resolve how tourism at the Abrolhos can best be managed, given the location and scale of tourism infrastructure required to service day visits and overnight visitation and the approaches required to ensure conservation, tourism and commercial fishing can co-exist sustainably.

The experience and understanding of existing charter boat operators and the Abrolhos community need to be built on and the challenges of developing tourism at the Abrolhos needs to be carefully considered (i.e. high end tourism, severe weather, testing environment, etc).

The **Master Visitor Plan for the Wallabi Group, Abrolhos Islands (2013)** set out approaches to develop day trips centred on the Batavia history, Beacon Island and nearby areas. The Master Plan set out a range of recommendations including:

- the Department of Fisheries (DoF) remain responsible for management of the aquatic and terrestrial resources of the day use areas;
- a Management Committee be established, made up of a senior manager from each of DoF and the WA Museum, with responsibility to deliver the new day visit experience;
- Negotiate a memorandum of understanding with DPaW to define their involvement in land management activities (e.g. rangers), and involve local community wherever possible in a sub-contractor and volunteer capacity (e.g. caretakers, guides, site protection, rehabilitation);
- The preparation of a Master Visitor Plan for the entire Abrolhos Islands identifying the complete range of tourism opportunities across all island groups.

Consultation highlighted challenges with governance in enabling tourism at the Abrolhos, due mostly to limitations within the Fisheries Resource Management Act, which is primarily to manage fish resources and extractive marine-activities. The Act does not enable DoF to facilitate the development or administration of non-extractive activities such as tourism.



Abrolhos Islands

In comparison, the Conservation and Land Management Act (administered by the Department of Parks and Wildlife) enables the development and administration of tourism activities for example, in National Parks and World Heritage Areas (e.g. Dirk Hartog Island, Shark Bay; Rottnest; Bungle Bungles) using a range of commercial systems, practices and resources. The Fisheries legislation may require amending depending on how the development of tourism at the Abrolhos is to be facilitated and governed.

A key determinant of the governance approach is what types of tourism might be established on the Abrolhos Islands, which could potentially include:

1. Hotel-resort style facility on Wallabi Island, catering to overnight visitors seeking 4-5 star service, typically 2-5 nights stay. Seasonal offering, influenced by weather conditions.
2. Refurbished ex-fishermen's Huts on numerous islands, rustic 'shanty' style holiday accommodation, for short stay visitors (e.g. 4-10 nights), typically 3-4 people per hut. Potentially a year-round offering albeit demand will be determined by school holidays and climate / weather conditions.
3. Nature based camping, very low impact 'hikers huts' on (5-6) selected islands offering guided activities-experiences in the immediate surrounds, visitors staying 1-2 nights then ferried to the next 'hut' and experience, hiking-style accommodation and hospitality (e.g. 3-sided huts, limited water, solar power, porta-loo's, swags), typically Apr-Jun and Oct-Nov subject to weather conditions.
4. Charter boats. Currently around 200 charter boats operate along WA's western coast, however, only 5-10 vessels regularly visit the Abrolhos. Demand is currently seasonal, niche-based and not sufficient to support charter vessels year-round (i.e. boats follow seasonal visitors/attractions up-down the Western Australian coast).
5. Guided day trip visits facilitated by air or sea travel (i.e. from Geraldton or Kalbarri) themed on the Batavia with optional snorkelling / kayaking or whale/dolphin experiences in the surrounding area. Potentially a year-round offering, weather permitting, subject to boat transfers being available at the Abrolhos.
6. Privately owned power/sail boats using designated moorings and anchorages for short stays. Typically a seasonal program from March to July and October-November. Most boats are self-contained and self-reliant.
7. Orion Class[^] cruise ships visiting the islands seasonally (e.g. April-May, whilst northern destinations are closed for the cyclone season), offering eco nature based activities and experiences, using their onboard facilities (e.g. tenders, dive gear, helicopter, kayaks, etc) and the specialist expertise of onboard guides (e.g. scientists and conservationists).

The Abrolhos Islands master visitor plan will need to identify the staged development of tourism infrastructure and how it can be managed sustainably whilst also appealing to a broad cross-section of visitors to ensure sufficient demand to reward investors and operators over the medium-long term. The Abrolhos could potentially be a 'green' eco nature based destination where facilities, visitors and governance subscribe to world-leading sustainable tourism principles. Management and governance of tourism needs to be resolved foremost in the master visitor plan.



Big Pigeon Island, Abrolhos

[^] Orion Class cruise ships are much smaller than conventional cruise ships; typically 100m LOA, 4m draft, 4000MT displacement, 75-150 passengers, 30-50 crew, 8,000nm cruising range; regularly cruising in the Kimberley, PNG, Solomon Islands, Great Barrier Reef, Tasmania, NZ and Antarctica; often specialising in eco tourism and adventure / expedition tourism.

Potential governance approaches include the following.

1. An island management authority similar in style to the Rottnest Island Management Authority.
2. A marine reserve administered by the WA Department of Fisheries under a revised legislative framework, if required, enabling management of extractive and non-extractive activities including tourism.
3. A conservation reserve administered by the WA Department of Parks and Wildlife under the CALM Act, utilising systems and approaches under the existing legislative framework in respect to whale shark licenses, Bungle Bungles eco-camps, helicopter flights at Mitchell Falls, dolphin tour operators, Dirk Hartog Island accommodation operators, etc.
4. Extending the City of Greater Geraldton's boundaries to include the Abrolhos (i.e. excising the islands from the Shire of Northampton); with corporate bodies managing private leasehold facilities on the respective islands, serviced by local government and / or sub-contractors, and the Abrolhos Islands Management Advisory Council having a role in overseeing development and continuity of the Islands integrity.
5. Status Quo. Working with DoF and potentially enhanced with the establishment of a community enterprise to develop and grow tourism by combining fishing groups (e.g. seafood processors, fishers), carrier boat operators, hut leaseholders, charter boat operators, visitor centres, inbound tour wholesalers / specialist tour promoters, air charter operators and vested-interest groups. The existing FRMA legislation may need revising to facilitate certain activities.

Preliminary economic analysis has not been developed for the Abrolhos Islands opportunity due to further community consultation required to determine the parameters for analysis. A full feasibility would be recommended. This should include the phased development of the Abrolhos into an "eco-green" sustainable-tourism destination, offering a range of accommodation, transport and activity-experience options. The Abrolhos could potentially rival the Ningaloo Coast and bring iconic appeal to the Mid West. Development of tourism at the Abrolhos Islands would be a medium-long term initiative extending beyond the planning horizon of this strategy.



Abrolhos Islands

2. KALBARRI NATIONAL PARK

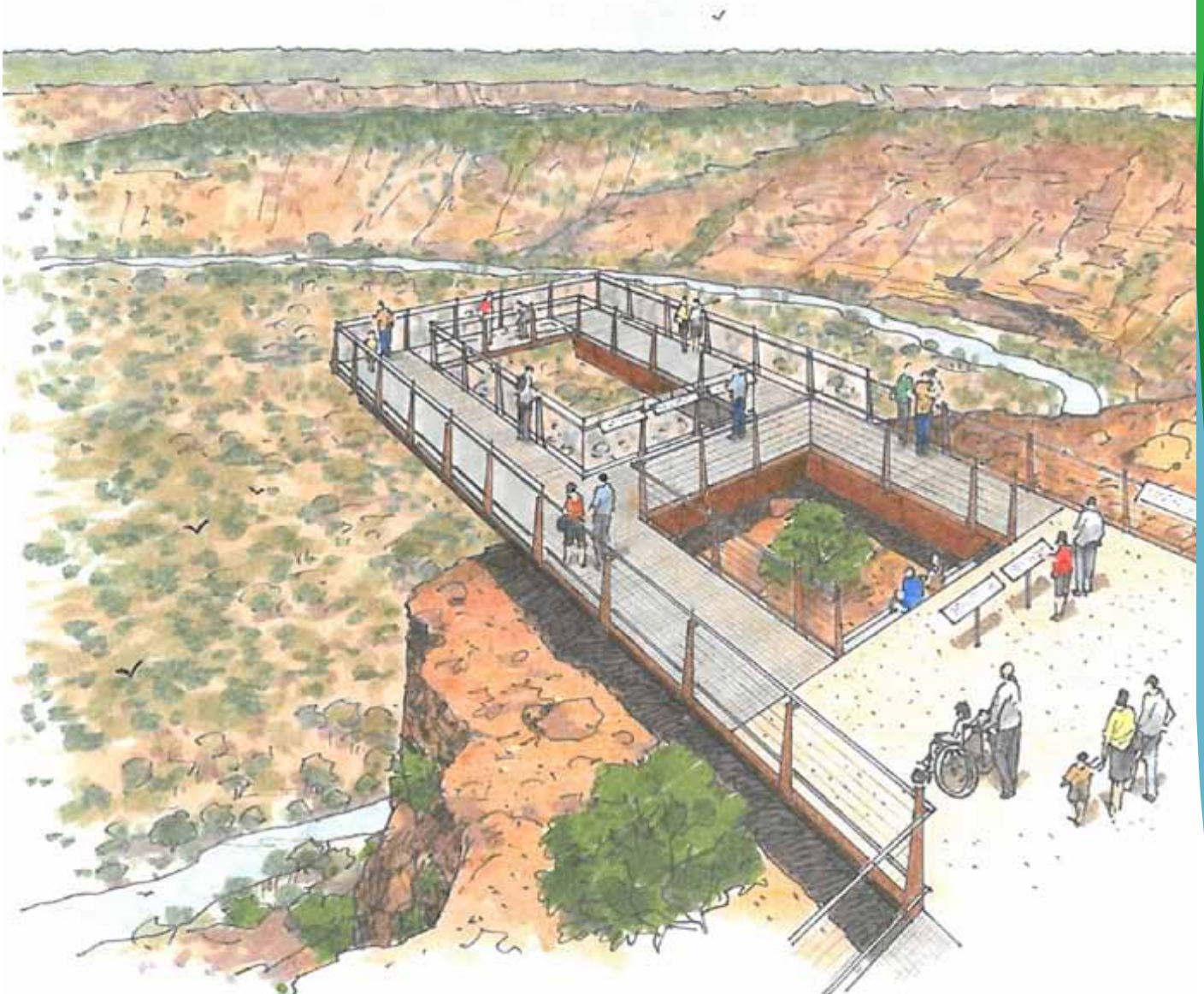
Kalbarri National Park covers an area of approximately 183,000 hectares and is located on the lower reaches of the Murchison River in close proximity to the coastal town of Kalbarri, around 6-7 hours drive north of Perth.

The Park hosts spectacular wildflowers, coastal landscapes and the Murchison Gorge, which extends for 80km from the hinterland to the sea. The gorge is home to popular formations such as Nature's Window, The Loop, Z-Bend and Hawks Head and offers majestic views at the Ross Graham lookout. Although famous for wildflowers the Park also offers a variety of bushwalks, picnic areas, hiking trails as well as canoeing, rafting, fishing and sightseeing.

The Park's Aboriginal cultural heritage, the history of 17th century European exploration and pastoral heritage provide visitor's with a fascinating range of appreciation and experiences. During 2008/09 to 2012/13 Kalbarri National Park averaged approximately 305,000 visits annually and around 334,000 visits in 2012/13 with peak visitation being from June to October.

Some of the roads into the park have recently been upgraded (Royalties for Regions funding) with 12km of the 32km road to the Loop (home to Nature's Window) and Z Bend sealed; and an aim to complete the remaining 20km as funding will permit. The Ross Graham lookout road is sealed. Public amenities and car parking areas have been upgraded at the Loop and West Loop lookout. There are no camping areas in the national park although sites have been assessed and pre-feasibilities undertaken for a naturebank eco retreat. Accommodation is available in Kalbarri, however, during peak periods the seasonal influx of visitors can result in accommodation shortages giving rise to the need for additional capacity.

DPaW have also commenced concept designs and preliminary planning for an iconic 'Skywalk' lookout that would offer visitors an exhilarating and magnificent view from a cantilevered platform extending out over the cliffs edge near The Loop. Collectively, these upgrades have potential to further raise the appeal and profile of the Park, increasing visitation and stay in the region, and bring iconic status to the Park and town.



Kalbarri Gorge skywalk (concept)



Kalbarri Gorges

Timing	Need	Risks	Benefit - Cost
<p>Develop an iconic 'skywalk' lookout in Kalbarri National Park, seal access roads, facilitate a Naturebank eco resort, a new public campground and upgrade trails.</p> <p>2015-2020</p>	<p>The gap is not having an iconic attraction in the Mid West that visitors can gravitate to. The fundamental problem is Ningaloo / Shark Bay have very high appeal that outweighs the Mid West. This project helps alleviate the problem by introducing an iconic skywalk, a high quality eco-resort and a wilderness campground. Factors contributing to the need include recent low growth in visitation to Kalbarri and the National Park and no wilderness eco-resort in the Mid West. This project will be highly valued by international visitors and high yielding 'aspirational achievers' and 'dedicated discoverers' who account for approximately 20-30% of Mid West Visitors. Beneficiaries of this project include Kalbarri residents, businesses, tourism operators and the broader visitor market. The main drivers of this project include sustained growth in eco-tourism, wilderness experiences and packaged tours / holidays.</p>	<p>Elements not evaluated that are potential risks include technical – design issues of the 'skywalk', investor interest in a Naturebank site, size of the campground, safety issues associated with trails, and the uncertainty of extra visitation. Scenarios that could disrupt this project that pose a risk include delays in commencement, significant fire or flood damage to the Park, and a superior 'iconic' feature appearing elsewhere. Broader risks include cultural heritage issues, feral animals, legal liability and geo-technical engineering constraints.</p>	<p>B:C Ratio.</p> <p>1.15</p> <p>Net Benefit.</p> <p>\$17,794,000</p>

3. COASTAL NODES

The Mid West has around 340km of coast and yet visitors have limited access to the coast, whilst elsewhere around Australia the coast has proven to be a major drawcard for visitors. There is vast potential to 'open up' the Mid West coast by increasing access (i.e. via tracks / unsealed roads) and developing shore-side eco-camps and day use sites. Potential sites for coastal eco-camps include Lucky Bay, Bowes River mouth,[^] Buller River mouth, Shoal Point, Freshwater Point, Cliffs Head, Gum Tree Bay and Illawong to name a few.

The coastal nodes are potentially short stay nature based eco campgrounds, similar to those in National Parks, with minimal infrastructure requiring minimal maintenance and servicing but may require 4WD to access some camp sites. Conservation and rehabilitation should be a high priority facilitated by volunteers, site users, seasonal caretakers and Shires.

Seasonal camp caretakers, based on DPaW's volunteer program, should be encouraged and adopted. The coastal nodes should enforce a strict no-tolerance policy in respect to rubbish, damage to flora / fauna, vehicle areas, pedestrian areas, visitor safety, fires and restricted length of stay (i.e. 14 day maximum during holiday periods; 21 day maximum outside holiday periods). Fees should apply when a caretaker is in residence (e.g. \$10 / night per site; \$70 / week per site; 1-2 nights stay free of charge) and free of charge when no caretaker is in residence.

The identified sites and other potential sites require investigation of tenure, land management responsibilities, access options, location / size of eco-camps, walkways to the beach, day time activity nodes, fire / risk assessment and a review of subregional policies/by-laws required (e.g. number of nights allowed to stay, dogs / pets, beach driving, fires, rubbish, fees, conservation, volunteer caretakers and servicing).

Preliminary economic assessment of developing coastal eco camps (in a later section) adopted an estimated \$600,000 investment per coastal node, which includes:

- \$150,000 to supply/install a four-unit Clivus Multrum* waterless composting pre-fabricated toilet block (including concrete pad and disabled ramp);
- \$100,000 to develop an unsealed access track for year-round, all-weather use;
- \$50,000 to develop unsealed all weather tracks into each respective camp site / overnight bay and parking for day use visitors;
- \$40,000 to supply / install corten barrier-posts marking camp sites, pathways, parking areas and conservation-rehabilitation zones;
- \$50,000 to supply/install a dump point and a rubbish collection area (e.g. to suit an 8-10m³ bulk bin);
- \$75,000 to supply / install communal benches and fire-rings, signage and rehabilitation planting/screening;
- \$60,000 site planning to facilitate the development of low impact eco-camps;
- \$50,000 contingency; and
- OPTIONAL \$75,000 to supply / install public (gas) BBQ, shade shelter and communal seating.



Dongara board walk

[^] Bowes River is mainly privately owned, there is an environmental strategy being developed that includes this area.

* Delivered to site price A\$85,000 for a four cubicle unit plus cost of installation, concrete pad and disabled ramp; Estimated cost to supply and install a prefabricated four cubicle unit is approximately \$135,000. Clivus Multrum WA. 08 9071 3126.

Timing	Need	Risks	Benefit - Cost
Five Coastal campsites and visitor nodes from Green Head to Kalbarri. 2018-2023	<p>The gap is having 340km of coast and very few locations to camp near a beach. The problem for the Mid West is visitors naturally gravitate to the coast and yet coastal camping and day use sites are limited. This project helps alleviate the problem. Factors contributing to the need include the IOD raising awareness of coastal experiences, limited choice of camping / RV options in the Mid West and the popularity of coastal facilities in general. This project will be highly valued by ‘dedicated discoverers’, ‘family connectors’ RV’ers, and 4WD / fishing enthusiasts, who may account for approximately 50% of Mid West Visitors. Beneficiaries of this project include towns in proximity, and tourism operators. The main drivers of this project include growth in camping, 4WD’s, RV’s, fishing and aquatic-marine holidays.</p>	<p>Elements not evaluated that are potential risks include zoning, tenure, access, coastal erosion, landscape-environment management and user conflicts. Scenarios that could disrupt this project that pose as a risk include coastal erosion, rare-endangered flora, fire, exposure to strong trade winds, beach-ocean dangers and extended stays. Broader risks include climate change, legal liability and technical site issues.</p>	<p>B:C Ratio. 0.50 Net Benefit. \$1,611,000</p>



Port Denison

4. ZUYTDORP COAST 4WD TRAIL

The Zuytdorp coast extends northwards from the Murchison River mouth to Steep Point. Southern access is via a seasonal river crossing near Kalbarri at Murchison House Station (\$50 fee payable).

A 4WD track leads from the river to the coast and northwards for a distance of approximately 160km to Tamala Station and Useless Loop Road (or an additional 70km along the coast to Steep Point). The 4WD trail could be a 3-4 day trip stopping at sites of interest (e.g. Zuytdorp wreck, cliffs, caves, southern beaches, cultural sites, ocean viewing sites, fishing locations, picnic sites).

The coastline is one of the western most points of Australia and the Zuytdorp cliffs are some of the most dramatic. A northbound drive takes travellers to Shark Bay World Heritage Area, Denham and Monkey Mia or potentially (alternatively) to False Entrance, Crayfish Bay and Steep Point (i.e. renowned fishing destinations). The trail has potential to be enhanced with interpretive panels, trail markers, camp sites, lookouts and picnic areas.

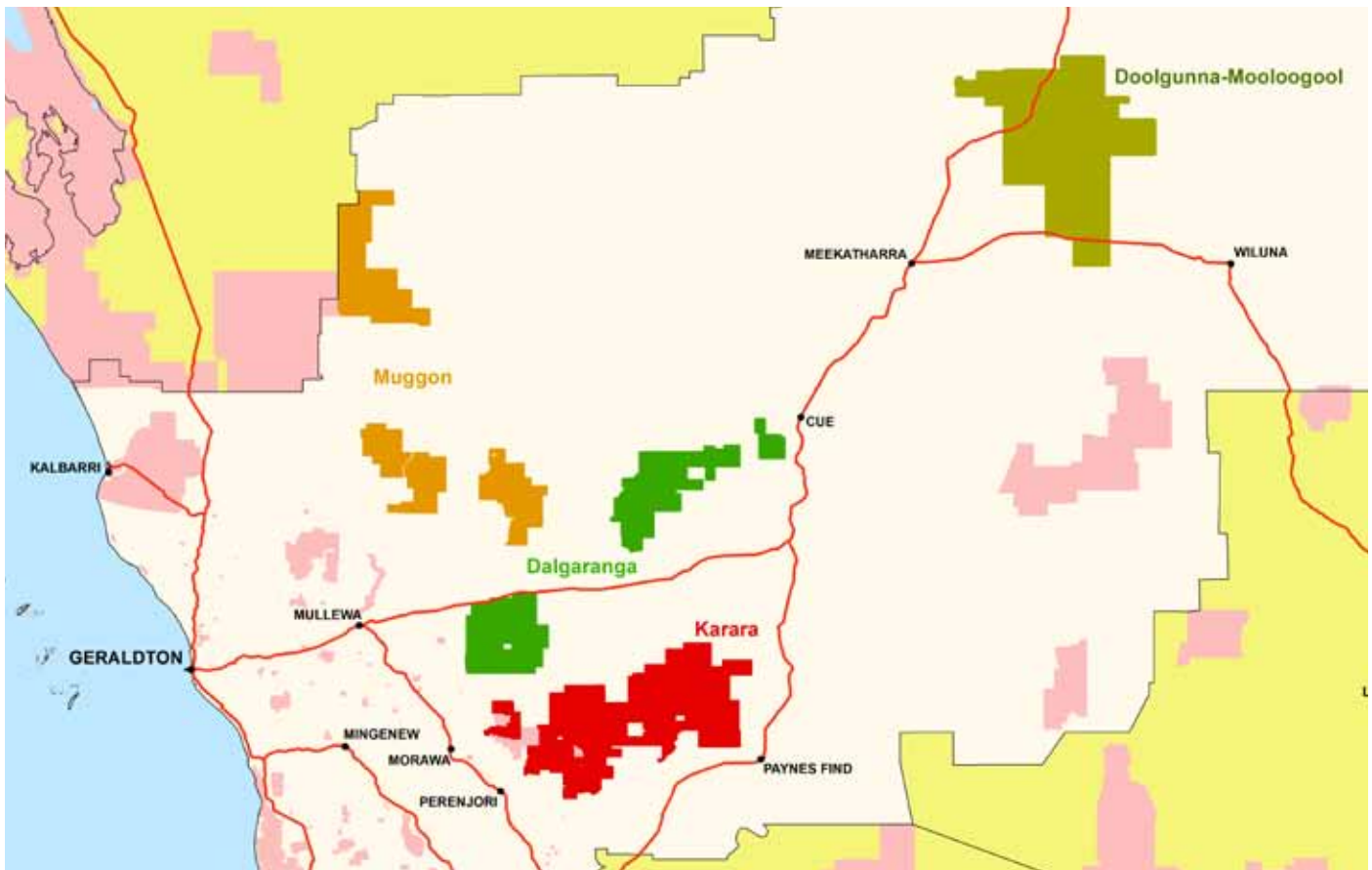
Travellers southbound from Shark Bay and Denham via Tamala Station could potentially gain access to Kalbarri along a scenic 4WD coastal track (as opposed to a 330km road trip). The trail has potential to link two highly visited areas, Kalbarri and Shark Bay, via a 4WD trail along cliffs, coast, beaches and a vast wilderness area. The existing through-tracks are located well back from the coast and are largely overgrown so would require significant improvement as well as spur roads to the coast.

The cost of development may be higher than estimated in the economic assessment. There are also issues relating to the vermin proof fence reserve, control of an invasive weed, impacts on pastoral operations, the difficulty of the terrain, access, safety and emergencies that need further investigation. Considerable involvement of DPaW and Pastoral stations is required to deliver on this priority.

Timing	Need	Risks	Benefit - Cost
<p>Develop a 4WD trail along the Zuytdorp Coast from Kalbarri to Shark Bay.</p> <p>2018-2022</p>	<ul style="list-style-type: none"> The problem is limited access to the coast from Kalbarri to Shark Bay and the lack of 4WD trails in the region. A fundamental problem is the existing limited access leads to under-utilisation of a potentially 'iconic' route. This project helps alleviate these gaps and problems. Factors contributing to the need include growth in 4WD's and 'outback' adventure seekers. This project will be highly valued by visitors seeking wilderness experiences as well as fishers, marine enthusiasts and 4WD'ers. Beneficiaries of this project include Kalbarri and Denham, tourism operators and Batavia Coast tourism. The main drivers of this project include the growth in 4WD's, camping/RV's, trails, outback tourism and wilderness experiences. 	<ul style="list-style-type: none"> Elements not evaluated that are potential risks, include visitor safety, health-medical amenities, feral animal populations, access via a river crossing, track alignment-route, managing visitor activities and pastoral lease operations-facilities. Scenarios that could disrupt this project, and pose as a risk, include extended stays, difficulty servicing sites, flood damage to tracks, impassable river crossing, cultural site restrictions, and fire risk to national parks. 	<ul style="list-style-type: none"> B:C Ratio. 4.00 Net Benefit. \$8, 392, 000

5. DPAW CONSERVATION ESTATE

An assessment of tourism assets on DPaW rangeland properties (2009) identified 'spectacular and unique landscapes, cultural heritage artefacts and wilderness style experiences' at properties adjacent to Mount Augustus and the Kennedy Range and former pastoral stations in the Murchison. In particular the Muggon Block (6 properties), the Doolgunna Mooloogool Block (2 properties), Dalgara Block (4 properties) and Karara Block (6 properties), covering an area of 1.95 million hectares (refer to the appendix for details).



The Gascoyne Murchison Outback Pathways self-drive trail was viewed as a potentially important conduit bringing visitors to tourism and camping facilities at the rangeland properties. A management presence would be required at the properties and this could involve indigenous stakeholders developing tourism products and experiences to help realise the tourism potential of the former pastoral stations. In the short-medium term, DPaW is planning to develop a selection of tourism projects in the Mid West including:

- Karara Block: Karara drive trail, camping opportunities and visitor facility improvements, extending across five ex-pastoral / farming properties.
- Moresby Range: Proposed Conservation Park. Access road upgrade and visitor facilities.
- Coalseam Conservation Park: Miners campground expansion and upgrade.

The four Mid West DPaW blocks with tourism potential for this strategy are indicated in the map above. Of these, the 'Karara' block, is the largest and is potentially a significant day trip and overnight destination with scope for multi-use trails, lookouts, flora / fauna appreciation, camping, homestead and shearers quarters accommodation, drive trails and conservation programs.

However, as a result of mining exploration and former pastoral activity the Karara Block is not in pristine condition and some of the landscape features and access points have been subject to significant alteration. Remediation and rehabilitation is required in some areas. Considerable involvement of Parks and Wildlife is required in developing this block for conservation and tourism.

Three other potential 'blocks' are located in the Murchison and represent large areas with significant natural features, flora/fauna, river-creek systems and built facilities that are largely under-utilised as eco-tourism assets. The development of these 'blocks' could potentially create a wide range of choices for nature based eco tourists, similar to the pastoral-tourism properties spread across the Kimberley and Northern Territory.

The 'blocks' could be linked via a drive trial and could potentially accommodate over 200 vehicles / 600 visitors-campers daily and employ local Aboriginal people as rangers. Their relative location would support towns as hubs where visitors seek replenishment, accommodation and hospitality. Some of the 'blocks' have potential to host geo tourism, the viewing of 'flash' rain events, heritage appreciation and conservation programs. The four 'blocks' are potential 'game changers' and could become major destinations for visitors to the Mid West's hinterland. Considerable involvement of DPaW is required to deliver on this priority.



Martu Rangers, Wiluna



Yellow Everlastings, Coalseam Conservation Park (Mingenew)

Timing	Need	Risks	Benefit - Cost
Karara Block 2015-2018	<ul style="list-style-type: none"> Limited choice of conservation - wilderness tourism properties in the Mid West. Limited accommodation capacity in the Murchison. 	<ul style="list-style-type: none"> Mining in the Karara area. Increase in tourist traffic, and the adequateness of health-medical amenities in the area. 	<ul style="list-style-type: none"> Karara Block B:C Ratio 8.38 Net Benefit \$46, 102, 000
Muggon, Doolgunna Mooloogool & Dalgara Block 2016 - 2021	<ul style="list-style-type: none"> Growth in camping / RV's, trails, outback tourism, popularity of wilderness tourism experiences (i.e. Kimberley and NT), and the growing awareness of conservation-based and geo-tourism. Meets the needs of eco nature based visitors, adventure-seekers, geo tourists, RV'ers and day visitors. Potential market is approx. 20-30% of Mid West Visitors (Karara) and 30-40% (Murchison Blocks). 	<ul style="list-style-type: none"> Potential disruptors include a surge in mining activity, diseases / pests / feral animals, flood and access restrictions, cultural sites voiding areas and 24hr noise from mining. Extensive remediation and rehabilitation required in some areas due to mining and pastoralism 	<ul style="list-style-type: none"> Muggon, Doolgunna Mooloogool and Dalgara Block B:C Ratio 3.04 Net Benefit \$21,282,000

6. GEO TOURISM AND A GEO PARK

A geo park is an area or region that has geological heritage of international significance. Some of the oldest rocks on the planet have been found in the Murchison and the Mid West. The Murchison in particular has significant potential to develop a geo park, which is a means to develop geo sites and geo tourism.

A geo park is where geo heritage is promoted to bring benefit to local communities. Geo tourism promotes geo sites focusing on the conservation of geo diversity and fosters an understanding of earth sciences through appreciation and learning. This is achieved through interpretation of sites, walk trails, guided tours, geo activities, seminars, educational materials and geo visitor centres (e.g. Mount Magnet). Geo tourism and geo sites focus on the geology and landscape of an area and can include unique landforms, mineralisation and evolutionary processes as features promoted to visitors.

A geo park does not impose restrictions on any economic activity within a geo park provided that activity complies with local, regional or national legislation (e.g. mining and pastoral can co-exist in a geo park or at a geo site). The United Nations Educational Scientific and Cultural Organization (UNESCO) supports geo tourism and geo parks as part of an integrated concept centred on the protection, education and sustainable development of geo sites and geo parks globally.

There are reportedly 'hundreds' of geo parks around the world (e.g. over 320 in China) and UNESCO's geo park 'brand' has amassed global awareness among travellers and tourists. In the Murchison there is a range of potential geo sites that could support a geo park including Mount Augustus, Windimurra, Walga Rock, Dalgara meteorite crater, Jack Hills, Mount Narryer, Peace Gorge, The Granites, Wilgimia ochre, and Poona to name a few.

A regional drive trail linking the sites and supported by guides, tours, walk trails, geo activities and educational materials would form the basis of the Murchison Geo Park. The Murchison Geo Park could also incorporate cultural and industrial heritage, mining tourism and a reinforcement of the earth sciences at a local level. A principal aim of the geo park would be to build visitation, increase expenditure, lengthen stay, promote tourism development and raise the global profile of the Murchison.

The Murchison has the option of establishing geo sites gradually over several years, compiling educational material, site infrastructure (e.g. signage, panels, trails, picnic areas), a marketing program and value-added services. At a later stage, once the region has established geo tourism as a niche product, the Murchison can re-evaluate the notion of becoming a UNESCO geo park or stay as an independent geo region. There is no compulsion to become a UNESCO certified geo park. During early 2014 the Australian Government indicated its interest in reviewing its policy on geo parks and UNESCO geo parks in particular.

Timing	Need	Risks	Benefit - Cost
<p>Develop a Geo-Park in the Murchison (i.e. 10 sites) with unsealed access roads, signage, amenities, educational & promotional material.</p> <p>2015-2020</p>	<ul style="list-style-type: none"> The gap is not having any geo tourism attraction in the Mid West, which is a prominent geology-intensive region. The fundamental problem is the Murchison has world-class geo tourism sites that are largely unknown and unvisited. This project helps alleviate the problem by introducing ten geo tourism sites linked by a self-drive route. Factors contributing to the need include recent low visitation to the Murchison and geo tourism being highly under-developed in WA yet growing globally. This project will be highly valued by international visitors, 'dedicated discoverers', 'grey explorers' and 'family connectors' who account for approximately 60-70% of Mid West Visitors. Beneficiaries of this project include Murchison businesses, tourism operators and Mid West tourism. The main drivers of this project include growth in geo tourism, wilderness experiences and nature based tourism. 	<ul style="list-style-type: none"> Elements not evaluated that are potential risks include site access, pastoral lease / operational implications, safety issues associated with self-drive trails and outdoor activities, and cultural heritage implications. Scenarios that could disrupt this project that pose a risk include delays in commencement, significant fire or flood damage to sites, and a superior alternative geo tourism area appearing elsewhere. Broader risks include cultural heritage issues, legal liability and environmental / pest control issues. 	<ul style="list-style-type: none"> B:C Ratio. 17.18 Net Benefit. \$11,169,000

3.4 ADDITIONAL REGIONAL TOURISM DEVELOPMENT OPTIONS

In addition to the six regional priorities outlined in section 3.3, three other regional opportunities were identified through consultation as having significant merit in supporting tourism in the Mid West and worth mentioning in this section. REMPLAN analysis has not been conducted on the initiatives due to uncertainty around the parameters that would apply. However due consideration should be given to:

- Mid West events;
- Aboriginal tourism; and
- Way finding.

MID WEST EVENTS

The Mid West events calendar (on the following page) provides a snapshot of events across the region, however, some smaller events may have been overlooked from the snapshot. The calendar highlights the broad range of 42 regional events and their timing. Most of the listed events have prevailed over time at a local or subregional level. Notably the Mid West does not have any iconic events that attract large crowds, span subregions or that generate a State or National profile.

The larger towns of Dongara and Geraldton have excellent recreation facilities with the capacity to host large sporting events such as golf, football, lawn bowls, basketball, netball, martial arts and indoor sports. Both towns (and some smaller towns) have a horse racing track with potential to host larger events such as music concerts, rodeos, camp drafts, vehicle-machinery display events and large scale outdoor hospitality events.

Seasonal trade winds in the Mid West from December to March are among the strongest in the world and are well suited to events / competitions in kite-boarding, windsurfing, sailing, kite flying, hang gliding and land sailing. The ocean also lends itself to competitions/events in fishing, free diving, game fishing and endurance sports (e.g. triathlons, ocean kayaking, long distance swimming).

The region is host to a significant resource of lobster, grains, beef, sheep, and goats and is supplemented by niche ventures in olives, wine, grapes, etc that collectively have potential to support a food-based event celebrating the region.

An iconic event is required and recommended for each subregion with complementary sports / activities, evening entertainment programs, local produce/culinary themes, interactive family activities, spanning towns / venues and inspiring a broad cross-section of visitors, travellers, residents and sponsors. An iconic event(s) has potential to significantly enhance the region's profile as a tourism destination.

It is recommended that:

- An Event Alliance or event leader's network be established ideally on a subregional basis as resources permit; and
- The group should engage with regional sporting groups, food producer groups, venue operators and stakeholders to identify a 'preferred list' of themes /activities / venues in developing an iconic event within the short-medium term.

Consultations identified a possible 'sea-fare' event incorporating a seafood festival, marine-leisure sports activities and product launches, ocean-side music, art and cultural venues, evening and daytime programs (e.g. entertainment, hospitality, and learning), industry involvement and regional produce.



Goo Fest, Yalgoo

MID WEST EVENTS CALENDAR

EVENT / MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
Peak Tourism Season	HOLIDAYS			HOL'S						HOL'S		HOL'S
Mullewa Agricultural Show												
Mid West Golden Bowls Carnival												
Mullewa Rodeo & Muster												
Mullewa Polocrosse Carnival												
Mullewa Arts & Craft Fair												
Geraldton Cup												
Valley View Concert & Show												
Perenjori Agricultural Show												
Perenjori Blues for the Bush Festival												
Morawa Bi-annual Arts Festival												
Mingenew Races												
Mingenew-Irwin Polocrosse												
Mingenew Lions Mid West Expo												
Three Springs Agric. Show												
Western Desert Races												
Geraldton Wind on Water Festival												
Northampton's Airing of the Quilts												
Geraldton Sunshine Festival												
Big Sky Readers & Writers												
Mid West Art Prize												
Nukara Music Festival												
Dongara-Port Denison Kitestock												
Kalbarri Sports Fishing Classic												
Kalbarri Zest Festival												
Underage Music Festival Morawa												
Geraldton Boat, Caravan & Camping Show												
Kalbarri Canoe-Cray Carnival												
Chapman Valley Ag. Show												
Northampton Agriculture Show												
Geraldton Music Festival												
Geraldton City to Surf Fun Run												
Australasia Safari												
Mount Magnet Ghymkana												
Dongara-Denison Lobster Festival												
Dongara Easter Horse Races												
G-Fest												
Meeka Outback Festival												
Yalgoo Emu Cup & Goo Fest												
Red Hill Concert												
Mount Magnet Astro Rocks Fest												
Murchison Polocrosse Tournament												
No of events / month	0	2	6	7	1	3	0	8	8	7	1	0

An indication of the potential visitor expenditure that could be attributed to an 'iconic' event in the Mid West is shown below. The estimates are based on 'best guess' patronage levels combined with TRA's visitor expenditure for day trip and overnight visitors. The estimates include lower, median and upper visitor expenditure.⁶ ^ The anticipated cost of the event could be subtracted from the expenditure estimates to provide an indication of the potential net economic benefit from an event.

ESTIMATE OF VISITORS TO AN ICONIC EVENT IN THE MID WEST			
	Lower estimate of Visitors	Median Estimate of Visitors	Upper Estimate of Visitors
Small Event	5,000	7,500	9,000
Medium Event	12,000	16,000	18,000
Large Event	20,000	25,000	30,000

ESTIMATE OF VISITOR SPEND ATTRIBUTED TO AN ICONIC EVENT IN THE MID WEST			
	Lower estimate of Visitor Spend	Median Estimate of Visitor Spend	Upper Estimate of Visitor Spend
Small Event	\$608,100	\$912,150	\$1,094,580
Medium Event	\$1,459,440	\$1,945,920	\$2,189,160
Large Event	\$2,432,400	\$3,040,500	\$3,648,600

In the short-medium term, the development of an iconic event in the Mid West will need to address seasonal limitations in accommodation, hospitality and amenities for a potentially large influx of visitors and the development of an event theme that can be sustained and developed over time while support for the event grows.

Consideration needs to be given to the sustainability of such events and the limited 'volunteer' resources available in the region. This may be somewhat mitigated by a events leaders network to help share resources. Recurrent funding is a common problem faced by most events and it may be appropriate to consider rationalising the funding of events on an annual basis to those that are iconic. Seed funding for new events that can prove sustainability beyond the first year is sometimes an option through small grant schemes. Nevertheless events must have sustainable business models to ensure the continuity and quality of the experience to the visitor.



Dongara Hotel

⁶ TRA Regional Profiles 2011/12.

[^] Average day trip spend \$110/visitor; average domestic overnight spend \$142/visitor; average international overnight spend \$52/visitor; weighted average regional spend \$122 per visitor. The origin of visitors at the event is based on averages from TRA Regional Profile for the Mid West 2009-2012; day trip 44% (i.e. 44% local visitors); domestic overnight visitors 49% (i.e. 49% Perth, regional WA and interstate); 7% international visitors.

ABORIGINAL TOURISM

Aboriginal tourism is under-developed across the Mid West. TWA research has found that 59% of visitors are seeking an Aboriginal tourism experience in WA yet only 26% are participating, highlighting the market gap (Tourism WA Industry Briefing, June 2014). Consultations across the Mid West identified a range of opportunities that could potentially lead to a variety of Aboriginal tourism ventures including:

1. Abandoned rail dams being used to farm yabbies and Aboriginal guides offering 'tucker' and talks at the sites (i.e. Yalgoo Railway Dams).
2. Walga rock, Wilgie Mia Mine and other appropriate sites in the Murchison forming part of a guided tour during the peak visitor season. Such activities would work with Traditional Owners already delivering informal talks with tourists (i.e. Walga Rock) and would ensure Aboriginal people were supportive of development.
3. Resourcing an under-utilised kitchen / commercial space (i.e. Yalgoo Railway Station building) to operate as a bush tucker café / bakery, as a training and tourism facility.
4. 4-6 day bus tour covering Wiluna, Meekatharra, Burringurrah, Mount Augustus, Gascoyne Junction, Carnarvon, Shark Bay, Kalbarri and Geraldton, with local indigenous tours/talks/tucker at each stop, with an Aboriginal guide accompanying the bus tour.
5. Campgrounds established on Aboriginal-owned lands, mostly for self-contained RV's and campers, with a range of activities / experiences offered such as talks, walks, art classes, tucker-meals, performances, star-gazing / night sky interpretation and cultural appreciation; mostly during the peak visitor periods. Ideally development would go hand in hand with capacity building and enterprise development support.
6. Establish a 4WD trail across Aboriginal owned lands with a tour guide offering cultural appreciation at selected sites and evenings.
7. Develop upgraded day use and camping facilities at Peace Gorge, Meekatharra, and introduce a range of guided tours, talks, bush tucker catering, star gazing and cultural appreciation within the area facilitated by local Aboriginal groups. This could potentially be extended to small bus tours in the surrounding area.
8. Implement existing plans for the Mount Magnet Granites Walk Trails. Develop capacity so that local people are able to utilise The Granites as a cultural tourism product / experience in partnership with the Badamia Land Aboriginal Corporation and Shire of Mount Magnet.

Alternative approaches are also required that provide 'hands on' assistance at community and individual operator levels to build the capacity to establish new tourism enterprises and new partnerships that can be sustained over the long term. For example, an Aboriginal tourism officer could be resourced to work with relevant agencies, associations and communities in helping Aboriginal entrepreneurs make the transition towards new ventures (e.g. planning, training, funding, administration, compliance, marketing, operations, etc). Alternatively, stakeholders could facilitate off-season mentoring or training for Aboriginal people wanting to develop tourism ventures, using recognised tourism operators (e.g. WAITOC award recipients) possibly in partnership with Indigenous Business Australia (IBA) and others.

There are several campgrounds in National Parks across the Northern Territory (e.g. Nitmiluk, Kakadu, Litchfield, King River, MacDonnell Ranges) where local indigenous rangers facilitate evening talks, slideshows and tastings for camp site visitors and many of these events are well organised, well patronised and invariably lead to additional stay and expenditure in the local area.



Ilgarijiri eggs, Geraldton Foreshore
~ Yamatji artist interpretation of the sky

WAY FINDING

The Mid West road network extends across 4000km+ of sealed and unsealed roads, leading to over 150 sites and places of interest. Most towns have printed maps, presented at a large scale and these are invariably of limited use when trying to find sites.

Signage is not always reliable. GPS in cars and smart phones/tablets and handheld GPS are commonplace and widespread, however, the maps in most GPS do not include tourism places of interest and many do not include secondary or unsealed roads. Visitor servicing via visitor centres can be extremely helpful in getting directions to places of interest, however, not all towns have visitor centres open seven days per week.

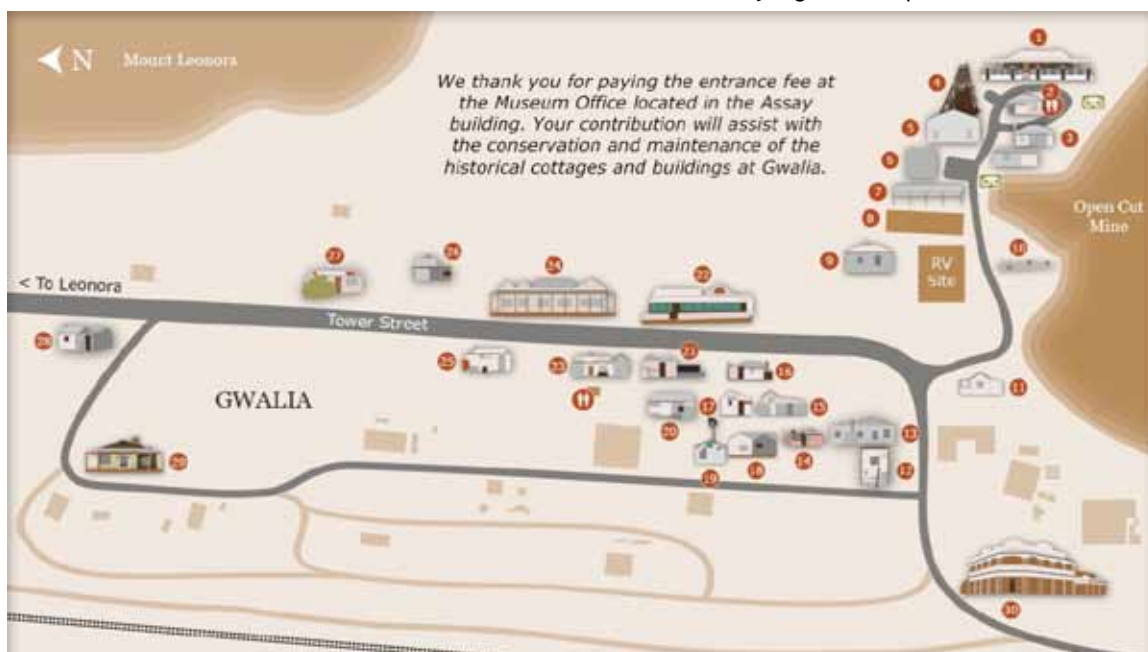
Smart phones have advanced significantly, for example Apps that greatly expand their functionality, however large areas of the Mid West are 'black spots' without phone coverage and satellite coverage is all that remains to support the use of so-called 'smart' devices. With these limitations, visitors to the Mid West, who are mostly self-drive travellers, are vulnerable to driving around the region not knowing precisely where places of interest are or how long it should take to get there and back.

Way finding is a key factor limiting growth in tourism visitation and stay across the Mid West. Suggested approaches to improve way finding across the Mid West include:

- An audit of directional and informational signs and an upgrade to address major gaps (i.e. signs that are missing, illegible, damaged or outdated);
- Inclusion in tourism brochures / planners the GPS coordinates for all sites / places (i.e. enabling visitors to input and get directions from their GPS systems);
- Standardised formatting of tourism brochures and planners that include maps, directions, travel times, site descriptions and site amenities;
- Gradual inclusion of sites and places of interest on Google Maps, powered largely by satellites rather than mobile phone networks; and
- Gradual inclusion of sites and places of interest on TWA's Experience Extraordinary App, powered largely by mobile phone networks.

Development of an interactive map (or App) of the Mid West that lists all sites / places relative to roads and tracks and that ideally shows the vehicle's location using satellite and GPS systems.[^]

An example of an interactive map developed for Gwalia town site is shown below. A similar map could be developed for the entire Mid West that utilises the GPS of 'smart' devices to show the visitors location relative to sites-places (i.e. without relying on the phone network in remote areas).



Interactive Gwalia townsite map

[^] Average day trip spend \$110/visitor; average domestic overnight spend \$142/visitor; average international overnight spend \$52/visitor; weighted average regional spend \$122 per visitor. The origin of visitors at the event is based on averages from TRA Regional Profile for the Mid West 2009-2012; day trip 44% (i.e. 44% local visitors); domestic overnight visitors 49% (i.e. 49% Perth, regional WA and interstate); 7% international visitors.

SECTION 4 - SUBREGIONAL TOURISM DEVELOPMENT

4.1 SUBREGIONAL TOURISM DEVELOPMENT PRIORITIES

Highly recommended development options for each subregion that are not detailed elsewhere in this report are outlined in this section. The results of a subregional preliminary economic analysis are included under each subregion.

BATAVIA COAST SUBREGION

The recommended priorities for the Batavia Coast subregion include:

- Kalbarri to Shark Bay 4WD trail.
- Kalbarri NP iconic skywalk, road sealing, naturebank eco camp, campground, enhanced trails.
- Coastal campsites and visitor nodes from Greenhead to Kalbarri.
- Eco accommodation and amenities on Abrolhos Islands.
- Headworks and pre approvals for a colocated Geraldton conference function centre

CONFERENCE FACILITY HEADWORKS

Geraldton has a range of essential infrastructure to support growth in fly-drive visitors however it does not have facilities to host larger scale conferences, seminars and functions that could potentially help grow the visitor market. The City has recently undergone significant upgrades that greatly enhance its appeal to the business market (i.e. conference patrons) including steady improvements to the West End precinct, foreshore and town streetscape.

There remains however, challenges concerning headworks at potential sites in around the City that could host a conference-seminar facility adjacent to or incorporated in a new hotel-resort. The cost of installing or overhauling the required headworks is prohibitive and a disincentive for developers. Appropriate pre-planning and the installation of headworks at a suitable site would be expected to result in new facilities and significant growth in the conference-seminar market in Geraldton.

**refer to Appendix E for assumptions behind REMPLAN analysis.

TIMING	BATAVIA COAST DEVELOPMENT PRIORITIES	CONSTRUCTION PHASE		OPERATING PHASE		NET BENEFIT \$M	BENEFIT COST RATIO
		OUTPUT \$M	JOBS	OUTPUT \$M	JOBS		
2018-2022	Kalbarri to Shark Bay 4WD trail along the Zuytdorp Coast to Tamala / Useless Loop Road (220km 4WD track, 2-3 overnight camps with eco-amenities, lookouts, trail markers). Investment \$1.8M-\$2.4M. Estimated number of additional visitors p.a.: 800 daytrip, 12,000 overnight domestic, 1,500 overnight international. Average 2 nights stay.	\$2.322	6	\$8.170	37	\$8.392	4.00
2015-2020	Seal roads into Kalbarri NP, install an iconic skywalk lookout, realise a Naturebank eco-camp, develop a new campground & enhanced trails. Investment \$15M-\$16M. Estimated number of additional visitors p.a.: 14,000 daytrip, 20,000 overnight domestic, 4,000 overnight international. Average 3 nights stay.	\$17.141	41	\$16.153	72	\$17.794	1.15
2018-2023	Develop coastal campsites & visitor nodes from Greenhead to Kalbarri (e.g. five new/upgraded sites with low level eco-infrastructure). Investment \$3.0M-\$3.5M. Estimated number of additional visitors p.a.: 500 daytrip, 2,700 overnight domestic, 720 overnight international. Average 2 nights stay.	\$3.594	9	\$1.267	6	\$1.611	0.50
2017-2022	Eco accommodation & amenities on Abrolhos Islands (e.g. 6 x low impact eco-camps, amenities, planning, moorings). Investment \$5.0M to \$6.0M. Estimated number of visitors p.a.: 900 daytrip, 2200 overnight domestic, 800 overnight international. Average 2 nights stay.	\$6.082	15	\$1.222	5	\$1.804	0.33
2016-2019	Headworks and pre-approvals for a Geraldton conference-function centre co-located with or adjacent to a hotel-resort. Investment \$2.0 - \$2.5M	\$2.258	7			\$0.008	0.00

MURCHISON SUBREGION

The recommended priorities for the Murchison subregion include:

- Develop tourism infrastructure on DPaW's conservation blocks (e.g. Muggon Block - six properties, Doolgunna Mooloogool Block - two properties and Dalgaranga Block - four properties);
- Develop a geo park across the subregion;
- Develop prospecting reserves for visitors;
- Support pastoral properties to develop tourism infrastructure; and
- Develop lookouts and safe viewing sites for flash rain events.

PROSPECTING RESERVES

The Murchison is steeped in history as a gold mining area and even today remains a significant producer of gold. Stories abound of prospectors discovering rich veins of gold, nuggets and panning for gold dust in the dry creek beds.

Abandoned mine shafts, including many that were dug by hand, remain scattered across the landscape. There are numerous books that invite and instruct prospectors and fossickers to explore the countryside in search of gold. Many of the regions caravan parks are occupied by amateur prospectors during the cooler months whilst many families and travellers undoubtedly have interest in searching for gold while in the region. Yet for many visitors this is not easily achieved.

TIMING	MURCHISON DEVELOPMENT PRIORITIES	CONSTRUCTION PHASE		OPERATING PHASE		NET BENEFIT \$M	BENEFIT COST RATIO
		OUTPUT \$M	JOBS	OUTPUT \$M	JOBS		
2016-2021	Develop tourism infrastructure on DPaW's three conservation blocks including upgrades for station stay accommodation, nature-based campgrounds, walk trails and flora/fauna appreciation. Investment \$6.0-\$8.0M; Estimated number of visitors p.a: 2,000 daytrip, 30,000 overnight domestic, 10,000 international. Average 3 nights stay.	\$7.741	19	\$20.541	92	\$21.282	3.04
2015 - 2022	Develop a Geo-Park across the region (i.e. 10 sites) with access, signage, amenities, educational & promotional material. Investment \$0.5M-\$0.8M. Estimated number of visitors p.a: 2,000 daytrip, 16,000 overnight domestic, 6,000 international. Average 3 nights stay.	\$0.498	1	\$11.321	51	\$11.169	17.18
2016-2020	Develop prospecting reserves for visitors (e.g. 3-4 reserves, site infrastructure, promotional material), Investment: \$0.3M-\$0.4M; Estimated number of additional visitors p.a: 1,000 daytrip, 12,000 overnight domestic, 3,000 international. Average 3 nights stay.	\$0.387	1	\$7.956	36	\$7.993	22.84
2018-2022	Support pastoral properties to develop tourism infrastructure including station stay accommodation, campgrounds and day use sites (e.g. 10-12 properties). Investment \$1.2M-\$1.8M. Estimated number of visitors p.a: 1,000 daytrip, 8,000 overnight domestic, 1,000 international. Average 2 nights stay.	\$1.216	3	\$10.914	49	\$10.630	7.09
2019-2023	Develop lookouts and safe viewing sites for flash events (e.g. 8-10 sites, designated viewing areas, rest areas / overnight camp areas, signs, interpretive panels). Investment \$1.0M-\$1.2M; Estimated number of additional visitors p.a.: 2,000 daytrip, 6,000 overnight domestic, 2,000 international. Average 3 nights stay.	\$1.216	3	\$4.397	20	\$4.513	4.10

**refer to Appendix E for assumptions behind REPLAN analysis.

The concept of establishing reserves for visitors to go prospecting in proximity to the towns has recently been considered by the Murchison LGA's. Towns such as Mount Magnet have a Registrars Office to issue prospecting licenses and a local business hires metal detectors. Scope may exist for the CRC's in each town to offer prospecting licenses via online portals to the Mines Department / Registrars Office. The concept of prospecting reserves in proximity to each town would be expected to increase visitation and stay during the cooler months.

PASTORAL TOURISM

Pastoral stations extend across the Murchison. A small selection of stations are well advanced in hosting visitors overnight and for day use activities. However, there remain many stations that are host to interesting landforms, waterholes, flora, geology and scenery that are not accessible to visitors and could potentially introduce tourism to improve their viability.

However, given the limited financial sustainability of some stations they will require assistance in developing tourism infrastructure such as signage, campsites, accommodation upgrades, public amenities, track / trail enhancements, promotional material and possibly mentoring. Financial assistance may also be required to maintain tourism infrastructure during the formative years whilst stations grow their tourism profile and patronage. The prospect of establishing a broader network of station stays, campgrounds and day use sites across the Murchison could significantly enhance visitation and stay in the region.



Station mustering time

FLASH WEATHER EVENTS

Climate change is affecting nature based tourism in Western Australia as noted by DEC (2012). Visible signs of climate change in the Mid West include disappearing wetlands, increased coastal erosion, changes in the flowering times of native plants, changes to the arrival-departure times of some bird species, a movement away from the usual locations by native animals, a decline in trees due to water stress (e.g. wandoo and tuart), changing fire regimes and a greater spread of weeds and pests.

These impacts are expected to continue across the Mid West over the long term (i.e. beyond 2024). Conversely, the onset of extreme weather events such as 'flash' flooding and extreme rain events are arguably a side-effect of climate change that the Mid West, and in particular the Murchison, could turn into an opportunity by making the after effects of 'flash' rain events an attraction-activity that draws visitors to affected areas.

The Murchison's vast catchment areas and associated river-creek systems come to life after flash rain events as evidenced by the flowing/flooding of rivers, creeks, lakes, waterholes and dams and this in turn triggers immediate change in wildlife movements (e.g. birds, kangaroos, reptiles), sprouting of new flora, the 'greening' of the countryside and invariably a boost in wildflowers (albeit delayed).

The development of 'safe' viewing areas, utilising existing roads and tracks largely unaffected by flooding, the creation of maps showing 'flash' event viewing sites, and promoted 'live' via social media (e.g. Facebook, Twitter, Instagram) has potential to attract and disperse visitors seeking eco nature based experiences across the Murchison. Visitors would be expected to stay in proximity to the 'safe' viewing areas for 3-4 days or until the 'after effects' begin to subside. There would be opportunity to extend their stay by redirecting visitors elsewhere across the Murchison and Mid West.



Yalgoo race course

NORTH MIDLANDS SUBREGION

The recommended priorities for the North Midlands subregion include:

- Extend and enhance the Wildflower Way;
- Develop interactive components of the Artbelt Project, creating a drive 'loop' with year-round appeal;
- Develop half/full day self drive routes with rest and overnight areas;
- Upgrade a selection of trails to multi use (walk, bike, horse, 4WD) and/or create new trails at popular sites; and
- Audit potential campsites and develop 4-5 eco campgrounds.

WILDFLOWER WAY

The Wildflower Way currently extends along the Mullewa-Wubin Road and is supported by an impressive array of signage, interpretive panels, brochure / map and online promotion. However the Wildflower Way is essentially one-way and the return trip offers travellers no themed experience. Extending the trail infrastructure along the Midlands Road and promoting the Wildflower Way as a 'loop' would be expected to disperse travellers more broadly across the North Midlands. Further, it would increase the scope to promote other activities and experiences in each of the towns and at sites / places of interest.

TIMING	NORTH MIDLAND DEVELOPMENT PRIORITIES	CONSTRUCTION PHASE		OPERATING PHASE		NET BENEFIT \$M	BENEFIT COST RATIO
		OUTPUT \$M	JOBS	OUTPUT \$M	JOBS		
2015-2020	Develop DPAW's Karara Block into a tourism-conservation-recreation destination (i.e. 5 ex-pastoral properties, farm stay, camping, trails, recreation, etc). Investment \$5.0M-\$6.0M. Estimated number of additional visitors p.a: 45,000 daytrip, 60,000 overnight domestic, 10,000 overnight international. Average 3 nights stay.	\$6.082	15	\$45.520	204	\$46.102	8.38
2018-2023	Develop half & full day self drive routes with rest and overnight areas (e.g. 3-4 routes with signage/markers, interpretive panels, eco-amenities, lookouts). Investment \$2.0M-\$3.0M. Estimated number of additional visitors p.a.: 25,000 daytrip, 10,000 overnight domestic, 6,000 international. Average 2 nights stay.	\$2.765	7	\$9.524	43	\$9.789	3.92
2015-2018	Audit potential campsites and develop 4-5 eco-campgrounds (e.g. with eco-amenities, fire rings, benches, designated bays, parking areas). Investment \$2.5M-\$3.0M. Estimated number of additional visitors p.a.: 1600 daytrip, 15,000 overnight domestic, 2,400 international. Average 3 nights stay.	\$2.488	6	\$9.264	42	\$9.002	3.27
2019-2024	Upgrade four trails to multi-use (e.g. walk, bike & horse) or create new trails at popular sites. Investment: \$1.2M-\$1.4M. Estimated number of additional visitors p.a.: 3,000 daytrip, 6,000 overnight domestic, 800 international. Average 2 nights stay.	\$1.216	3	\$2.995	13	\$3.011	2.51
2020-2025	Extend the wildflower self-drive trail along the Wildflower Way & Midlands rd (i.e. creating a loop with signs, markers, information panels, rest areas, etc). Investment \$0.75M-\$1.0M. Estimated number of additional visitors p.a.: 2,400 daytrip, 4,400 overnight domestic, 2,000 overnight international. Average 1 nights stay.	\$0.968	2	\$1.472	7	\$1.565	1.79

*refer to Appendix E for assumptions behind REPLAN analysis.

ARTBELT PROJECT

Artbelt is an art-inspired project of 30+ art-sculptural installations and activities-events proposed for the North Midlands. The project has been thoroughly researched and reported and provides a unique opportunity to provide visitors with an alternative experience to wildflowers. The recommendation is to focus on installing hands-on, interactive sculptures, installations and displays that invites visitors to engage with the artworks. Installations located at strategic sites in / near towns, popular day use sites, scenic locations, drive route junctions and trail heads would encourage visitors to disperse across the North Midlands. The Artbelt Project Report was completed in 2012 and provides a detailed guide to development approaches to help realise the project in the short-medium term.



Church, Mullewa

ALTERNATIVES TO WILDFLOWERS

Wildflowers as a regional theme is inherently seasonal, supports a short window of visitation and is highly susceptible to the vagaries of climate change and 'poor' wildflower seasons. The development of alternative activities and experiences would reduce the risk of over-relying on wildflowers and could potentially extend the visitor season. Alternative experiences and activities can include multi-use trails for mountain bikes, walkers and horse riding; picnic areas at lookouts or scenic locations; heritage trails with maps and interpretive panels; and short or half day self-drive trails with rest areas or picnic sites at scenic locations; and road-side promotion in towns of what's happening in the local community on a weekly basis (e.g. at sports clubs, town halls, events, etc).

ECO CAMPGROUNDS

Peak visitation July to September can result in accommodation shortages. Additional 'built' accommodation is required, especially using disused and under-utilised facilities. However the region a limited range of camping facilities and capacity. There are several areas of high natural attraction and appeal that could potentially host an eco campground and encourage higher levels of visitation and stay.

An audit of potential sites is required in identifying locations for eco campgrounds. The campgrounds would contain minimal infrastructure given that an increasing number of visitors are largely self-contained. Toilets and communal fire rings and picnic benches would form the basis for an eco campground of typically 8-10 sites suited to vans, campers and tents.



Geraldton Art Gallery

4.2 SUBREGIONAL ACTION PLANS

BATAVIA COAST SUBREGION

The action plan for the Batavia Coast subregion focuses on three key areas:

1. Marketing, branding and promotion;
2. Capacity building to better service higher levels of visitation; and
3. Improved standards and service delivery.

The following actions are prioritised and budgets are indicative 'best estimates' that could be jointly funded by Shire operating/capital budgets and supplemented by grants or in-kind contributions. The Shires and the respective CEO's may consider establishing a memorandum of understanding (MOU) to provide a framework for 'regionalising' the Plan.

ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES
MARKETING, BRANDING & PROMOTION				
Assign Australia's Coral Coast to manage selected aspects of Batavia Coast promotion. ^o	H Start: 2015 Finish: ongoing	Shires via MOU	\$10,000 / Shire; Total \$30,000p.a. ACC will match it with \$30,000p.a.	Targeted promotional campaign. Increased visitation.
Establish a regional tourism website. See appendix for details.	M Start: 2016 Finish: 2017	Shires via MOU	Approx: \$8,500 each shire. Total: \$25,000	Website commissioned. Number of hits and downloads.
Establish multiple outlets in towns to display / distribute tourism brochures and planners.	M Start: 2015 Finish: 2016	Shires via MOU	Estimated cost: <\$1000 per town	More outlets with tourism information. Positive feedback from visitors.
Develop regional branding: a regional name and a logo on signs, brochures, website, entry statements, billboards, advertisements, etc.	M Start: 2015 Finish: ongoing	Shires via MOU	Estimated cost: \$5000 graphic design; \$10,000p.a. signage, displays, promotions, advertising.	Visible branding across the region. Variety of promotional mediums used.
Establish a Batavia Coast entry statement at northern and southern entry points.	M Start: 2015 Finish: 2016	Shires via MOU	Estimated Cost: \$50,000-\$100,000	Entry statement installed. Positive feedback from visitors.
Establish pooled funding to support subregional tourism data collection. [^]	M Start: 2015 Finish: ongoing	Shires via MOU	Estimated cost: \$10,000p.a.	

* H – high priority; M – medium priority; L – low priority

^o For example, at interstate trade and consumer shows, in liftouts and special promotions in Statewide newspapers, at selected overseas trade fairs/consumer events, at trade promotions with wholesalers / promoters, and at forums/events targeting intrastate travellers. Emphasis should be on promoting the Batavia Coast, Kalbarri to Green Head, and the main attractions/experiences.

[^] Commencing with self-completion surveys in visitor centres, accommodation facilities and prominent places (e.g. Museum, Greenough Hamlet, etc); adding occasional intercept surveys at popular day use sites;

CAPACITY BUILDING						
ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES		
Appoint a sub-committee to assist upgrading trails to multi-use, short/long, in partnership, with/without day use amenities, etc.	H Start: 2015 Finish: 2019	Shires via MOU Shire Tourism Officers	Estimated cost: \$40,000 Trail Plan.	Sub-committee established. Trail Plan developed. Trails slowly upgraded / developed.		
Invite participation of operators and stakeholders on MWTA to assist in managing this strategy.	H Start: 2015 Finish: ongoing	MWTA		Broader membership. Stronger input from industry-operators.		
Investigate coastal locations where new nature based eco campgrounds can be established for RV's, campers and travellers for 2-10 days stay.	H Start: 2015 Finish: 2019	Shires via MOU	Estimated cost: \$40,000 camp site audit and development plan.	New campgrounds introduced. Regular patronage and utilisation. Positive feedback from visitors.		
Investigate locations where undeveloped or overlooked day use sites ^o can be established.	M Start: 2015 Finish: 2018	Shire Tourism Officers and Staff		New sites opened up. Regular visitation by tourists.		
Investigate locations for RV / caravan overflow areas during peak periods.	M Start: 2015 Finish: 2018	Shire Tourism Officers and Staff				
Investigate how Batavia Coast can fund and resource a Tourism Enterprise Development Officer [^] for 3-4yrs.	M Start: 2016 Finish: 2019	Shires via MOU	Estimated cost: \$100,000p.a.	T.O. appointed full time. Subregional initiatives actioned.		
Explore centralised training of Visitor Centre (VC) staff; building / sharing a pool of trained VC staff. Explore ways for subregion VC's to collaborate, share resources / expertise, programs, etc.	M Start: 2016 Finish: 2019	Shire Tourism Officers VC Managers		Increased collaboration. More efficient operations. Increased capacity. Higher quality service to visitors.		
Explore upgrades [~] at nature / wildflower rich sites and develop into destinations on day trip drive trails-routes.	M Start: 2016 Finish: 2019	Shires via MOU Shire Tourism Officers and Staff		Wider range of quality day use sites. Higher dispersal of visitors / impacts. Positive feedback from visitors.		
Explore with MWCCI approaches to help grow tourism capacity in business and industry.	M Start: 2015 Finish: 2019	Shires via MOU		Businesses engaged with MWCCI. New capacity / ventures introduced.		

* H – high priority; M – medium priority; L – low priority

^o For example sites with permanent waterholes (i.e. for bird watching), lookouts-vistas, unique land formations, flora / fauna / bird hotspots, bush walking-biking, shaded picnic areas, cultural sites, heritage-history relics, etc.

[^] Working exclusively with tourism operators and prospective start-ups on planning, marketing, industry networking, training, business improvement, product/service standards, quality accreditation, etc..

[~] For example, enhance sites with walk / bike trails, lookouts, bird hides, picnic areas / BBQ's, interpretation panels, boardwalks, amenities/toilets, 4WD trail, overnight camping / 24hr rest areas, shade facilities, water, etc.

STANDARDS & SERVICE DELIVERY						
ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES		
Shires enter a Memorandum of Understanding to guide subregional tourism development.	H Start: 2015 Finish: ongoing	Shire CEO's		MOU signed by all shires. Agreement on tourism action plan. Shires committing to regional tourism.		
Gain accreditation to CMCA's RV Friendly Town program. ^o	H Start: 2015 Finish: 2017	Shire CEO's	CMCA and TWA's subsidised dump points; CMCA's State Representative.	RV Friendly Town Accreditation. Signs installed. RV visitation and stays.		
Audit signage across the subregion, address gaps in directional, informational and interpretative signs.	M Start: 2016 Finish: 2018	Shires via MOU	Estimated cost: \$40,000-\$50,000 sign audit. \$500,000 signs and panels.	Signage gaps addressed. Positive feedback from visitors. Increased visitation to selected sites.		
Explore delivering region-wide training in service, quality, tourism value and visitor safety.	M Start: 2016 Finish: Ongoing	Shires via MOU Shire CEO's	Create new or access existing programs, [^] online or in workshops.	Training approach identified. Training program commenced.		
Develop subregional famils for visitor centre staff (i.e. visiting towns / sites across the region.	M Start: 2016 Finish: Ongoing	Shires via MOU Shire CEO's				
Record GPS coordinates of ALL subregional tourism sites and upload to Google Maps.	M Start: 2016 Finish: Ongoing	Shire tourism officers and staff.		Sites displayed on Google Maps. Positive feedback from visitors.		
Investigate re-aligning boundaries to include Jurien-Green Head in the Batavia Coast.	M Start: 2016 Finish: 2018	Shires via MOU Shire CEO's				
Investigate with seafood processors the supply of lower-priced 'seconds' grade seafood to local shops, cafes and restaurants.	L Start: 2015 Finish: 2016	Shire CEO's		Local seafood available in local shops. Positive feedback from visitors.		

* H – high priority; M – medium priority; L – low priority

^o Dongarra and Geraldton have commenced the process. Northampton should consider becoming RV Friendly, especially if Kalbarri continues to reject the concept.

[^] Examples include <http://www.austrade.gov.au/Tourism-and-business/T-QUAL/Accreditation> ; <http://aussie-host.com.au/en-us/ourproducts/courseprofiles.aspx> ; http://www.ahawa.asn.au/training/wa-service_with_a_smile.phtml ; <http://www.tourismcouncilwa.com.au/events> ; Creating new could be in partnership with groups such as CMCA, Tourism Council WA, WA TAFE.

Initiatives that individual Shires should monitor and / or develop into new infrastructure/ activities / experiences, independently or in partnership with respective authorities or land owners, are listed below (note that significant initiatives such as Abrolhos islands tourism opportunities, coastal node development, proposed Geraldton conference-function centre etc are included in the subregional and regional priority sections of the document):

CITY OF GREATER GERALDTON

- Completion of Batavia Coast Marina stage 2.
- Western Australian Museum Geraldton redevelopment project.
- Development of leisure, recreation and conservation amenities on the Moresby Ranges, including DPAW and Private holdings.
- Formalise and upgrade selected sites currently used for mountain bike riding by implementing MBT standards and facilities; promoting as dedicated venues, appealing to enthusiasts and recreational users; and supporting events that help grow visitation to the region.
- Continue to support development of the West End cultural precinct, enhanced with events, performances, installations, light shows, displays-exhibitions, social-cultural gatherings, galleries / artisans, etc. Promote to visitors as the cultural epicentre of Geraldton hospitality and entertainment.
- Continue to explore the development of tours, activities, experiences, hospitality, guides, trails and shopping as packages / itinerary options for cruise ship passengers; continue to promote strongly to cruise ship companies; encourage (offer) increased capacity in buses, guides and visitor service delivery.
- Continue to investigate the development of an additional caravan park within proximity to the coast, in the township of Geraldton, preferably with a limited number of permanent residents and a mix of cabins, powered sites, unpowered sites and basic amenities for travellers.
- Investigate the development of 24hr overnight rest bays within 25-75km of Geraldton.
- Investigate the upgrading and / or development of short stay camp sites within the regional hinterland; install signage, promote in planners / brochures, and include on website listings; encourage growth in travellers staying overnight in the region.

SHIRE OF IRWIN

- Continue to encourage the development of a 4-5 star hotel-resort at the former Kailis plant site near the foreshore; ideally 40-50 rooms to support events / seminars using the conference facilities within the recreation centre. Encourage TWA to co-promote the site to investors.
- Encourage the development of additional farmstays, holiday homes, B&B's and lodges-hostels; encourage growth in visitation during the peak periods.
- Investigate the development of a fortnightly or monthly farmers market in-near town; encouraging local producers, entrepreneurs and businesses to deliver a variety of produce and products.
- Investigate parking for long vehicles near the main street, with appropriate signage;
- Continue to explore the sustainability of an ocean pool as an attraction.
- Investigate greater use of the river, the riverbanks and surrounding areas, including day time activities (e.g. trails, picnic areas, benches, pathways, canoeing, swimming) and evening activities (e.g. BBQ's, rest areas).
- Investigate larger, more prominent signage on the Brand Highway / Kailis Drive junction to encourage higher volume of visitors / vehicles into Port Denison.
- Investigate re-branding as Dongara with a strong emphasis on ocean/coast, river, heritage, country town, fishing and marine activities. Phase out Port Denison and Shire of Irwin from all branding and tourism promotion. Introduce a logo and tag line and incorporate into all promotional mediums.
- Investigate upgrading directional signage in-around Geraldton to the visitor centre, day use sites, attractions / places of interest, hospitality, parking (for long and short vehicles), trails and sport-rec facilities.
- Continue to progress the Port Denison Foreshore master plan.
- Continue to progress the Town centre revitalisation plan including the RV park, the relocated Visitor Centre and visitor amenities at the Park.
- Continue to progress the development of tourism nodes along the coast both as day use sites and overnight short stay sites.

SHIRE OF NORTHAMPTON

- Investigate the installation of additional water fountains, public toilets, shade shelters, BBQ's, bike racks and benches along the main foreshore (Kalbarri).
- Investigate with DPAW the development of a walk / bike trail from town to Meanara Hill through the reserve / bush (Kalbarri).
- Encourage upgrades to fishing amenities such as boat ramps, jetties, shore-side platforms, car-trailer parking bays and safety signs messages.
- Investigate free Wi-Fi at public venues across Kalbarri township.
- Install visitor information displays (i.e. brochures and maps) at shops throughout Northampton, promoting local visitor attractions and activities.
- Investigate Northampton township becoming RV Friendly to encourage stopovers and 2-3 day stays.



Oakabella, Northampton

SHIRE OF CHAPMAN VALLEY

- Continue to investigate and develop sites for overnight caravan / RV stays.
- Continue to investigate and develop construction of White Peak road linking the coast to the Valley.
- Encourage the refurbishment / redevelopment of short term accommodation at farms, homes, lodges and under-utilised buildings.
- Investigate the development of walking, riding, cycling trails along the old railway line between Yuna and the Moresby Ranges.
- Investigate upgrading access, facilities and capacity at the Buller river mouth for short stay camping and day use activities.
- Investigate a guided route / self-drive trail off NW Coastal Highway through the Valley highlighting heritage, landforms, river / creek, views / lookouts, rest / picnic areas, overnight accommodation and local businesses; incorporate trail markers along the route.
- Investigate establishing an overnight rest area adjacent / near to Naraling Hall; incorporate a short walk trail to surrounding wildflower 'hot spots'.
- Investigate better utilisation of disused railway reserves as overnight stays, picnic areas, wildflower viewing areas, cycle / walk trails or rest areas.
- Investigate the re-activation of disused farmhouses as farmstays, B&B's or holiday rentals; encourage landlords / owners to utilise houses for short stay.



Dongara orchard

MURCHISON SUBREGION

The action plan for the Murchison subregion focuses on three key areas:

1. Marketing, branding and promotion;
2. Capacity building to attract and service higher levels of visitation; and
3. Improved standards and service delivery.

The following actions are prioritised and budgets are indicative 'best estimates' that could be jointly funded by Shire operating-capital budgets and supplemented by grants or in-kind contributions. The Shires and the respective CEO's may consider establishing a memorandum of understanding (MOU) to provide a framework for 'regionalising' the Plan. Action plans for each shire have been presented in a separate document and provide specific actions for each LGA.

ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES
MARKETING, BRANDING & PROMOTION				
Assign Australia's Golden Outback to manage promotion of the Upper Murchison.	H Start: 2015 Finish: ongoing	Shires via MOU	\$5,000 each Shire; Total \$40,000p.a. AGO will match it with \$40,000p.a.	Targeted promotional campaign. Increased visitation.
Re-design and standardise each Shire's (DL-size) Tourism Brochures. See appendix for details.	H Start: 2015 Finish: 2017	Shire CEO's	Standardised template. Graphic designer. \$4,000 for 8000 brochures.	Common format-layout of brochures. Positive feedback from visitors.
Develop a regional holiday planner combining Shire tourism brochures and maps. See appendix.	H Start: 2016 Finish: Ongoing	Shires via MOU	Estimated cost: \$15,000	Holiday Planner published. Positive feedback from visitors.
Establish a regional tourism website. See appendix for details.	M Start: 2016 Finish: 2017	Shires via MOU	Approx: \$4,000 each shire. Total: \$30,000	Website commissioned. Number of hits and downloads.
Establish multiple outlets in towns to distribute brochures/planners and tourism information.	M Start: 2015 Finish: 2016	Shire CEO's	Estimated cost: <\$500 per town	More outlets with tourism information. Positive feedback from visitors.
Adopt regional branding: a regional name, Billy Bungarra on signs, brochures, websites etc.	M Start: 2015 Finish: ongoing	Shires via MOU	Estimated cost: \$5000 graphic design; \$10,000 signage and displays.	Billy Bungarra visible across the UGM. Promotional mediums displaying Billy Bungarra.
Establish and maintain a register of UGM station stays.	L Start: 2015 Finish: ongoing	Shires via MOU	Phone enquiries to pastoralists. List-register of station stays.	Up-to-date register of station stays. Visitation-stays at station stays.
Establish a Facebook page titled "Everything Murchison" and update regularly.	L Start: 2015 Finish: Ongoing	Shires via MOU	Estimated cost: <\$100	Facebook page established. Growing number of 'likes'.

* H – high priority; M – medium priority; L – low priority

CAPACITY BUILDING					
ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES	
Appoint a sub-committee to coordinate the establishment of a geo park across the UGM. See appendix for details.	H Start: 2015 Finish: 2019	Shires via MOU	Estimated cost: \$250,000	Sub-committee established. Sites identified, information and collateral developed and operational.	
Identify and establish a series of sites-places-lookouts to <u>safely</u> view the after-effects of significant 'flash' rain events across the UGM.	H Start: 2015 Finish: 2019	Shire CEO's	UGM Topographical maps. Local knowledge and input. Site visits to survey sites and access.	Routes linking 'flash' event sites. Print material promoting flash events. Visitors attending flash event sites.	
Establish UGM Tourism Committee of operators, and community to assist implement this strategy.	H Start: 2015 Finish: ongoing	Shires via MOU	UGM residents and community. Murchison Tourism Association Constitution	Committee formed and activated. Roles-Responsibilities assigned.	
Encourage pastoral stations to allow visitor access, day-use visits, tours and/or camping.	H Start: 2015 Finish: ongoing	Shires via MOU Shire CEO's	In-kind support where appropriate.	Increase in station stay network. Increase in visitation to stations.	
Investigate how UGM can fund and resource a tourism development officer for 3-4yrs	H Start: 2015 Finish: 2018	Shires via MOU	Estimated cost: \$100,000p.a.	TDO appointed full or part time. Regional tourism initiatives actioned.	
Investigate locations where new campgrounds can be established for RV's, campers and travellers for 2-10 days stay on Shire, pastoral or UCL.	H Start: 2015 Finish: 2019	Shire CEO's	Estimated cost: \$20,000-\$50,000 per campground.	New campgrounds introduced. Regular patronage-utilisation. Positive feedback from visitors.	
Investigate locations where undeveloped or overlooked day use sites° can be established.	H Start: 2015 Finish: 2018	Shire CEO's		New sites opened up. Regular visitation by tourists.	
Explore how UGM can create prospecting reserves for visitors to enjoy prospecting.	M Start: 2015 Finish: 2016	Shires via MOU Shire CEO's	Estimated cost: \$10,000 per site p.a.	Prospecting reserve established. Positive feedback from visitors / users.	

* H – high priority; M – medium priority; L – low priority

° For example sites with permanent waterholes, lookouts-vistas, unique land formations, flora/fauna/bird hotspots, fossicking – prospecting, walking-biking, shaded picnic areas, cultural sites, unique flora, etc.

STANDARDS & SERVICE DELIVERY					
ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES	
UGM Shires enter a Memorandum of Understanding to guide regional tourism. See appendix for details.	H Start: 2014 Finish: 2015	Shire CEO's	Undertaken during MEG meetings.	MOU signed by all shires. Agreement on tourism action plan. Shires committing to regional tourism.	
Gain accreditation to CMCA's RV Friendly Town program.	H Start: 2015 Finish: 2017	Shire CEO's	CMCA and TWA's subsidised dump points; CMCA's State Representative	RV Friendly Town Accreditation. Signs installed. RV acknowledgement.	
Audit signage across the UGM, address gaps in directional, informational and interpretative signs. <u>No</u> replacing of existing, functional signs.	M Start: 2016 Finish: 2017	Shires via MOU	Estimated cost: \$40,000-\$60,000 sign audit. \$100,000 signs and panels.	Signage gaps addressed. Positive feedback from visitors. Increased visitation to selected sites.	
Explore delivering region-wide training in service, quality, tourism value and visitor safety.	M Start: 2016 Finish: Ongoing	Shires via MOU Shire CEO's	Create new or access existing programs. ^o	Training approach identified. Training program commenced.	

* H – high priority; M – medium priority; L – low priority

^o Examples include <http://www.austrade.gov.au/Tourism-and-business/T-QUAL/Accreditation> ; <http://aussie-host.com.au/en-us/ourproducts/courseprofiles.aspx>; http://www.ahawa.asn.au/training/wa_service_with_a_smile.phtml ; <http://www.tourismcouncilwa.com.au/events> ; Creating new could be in partnership with groups such as CMCA, Tourism Council WA, WA TAFE.



Austin Street Post Office, Cue

Initiatives that individual Shires should monitor and / or develop into new infrastructure / activities / experiences, independently or in partnership with respective authorities or land owners, are listed below (note that significant initiatives such as upgrades to DPaW's conservation estate, developing prospecting reserves, geo park etc are included in the subregional and regional priority sections of the document).

SHIRE OF CUE

- Investigate with CMCA the gaps to address for Cue to become an 'RV Friendly Town'.
- Investigate increasing short stay options e.g. camping, Station stay, Pensioner Huts, etc.
- Investigate sites for potential use as a caravan / RV overflow area during peak periods.
- Create a geo cache trail in around town.
- Investigate sites to promote as 'bird viewing' sites (e.g. 2-10km from town).
- Investigate developing a half-day 4WD trail to key sites in close proximity to town.
- Investigate free Wi-Fi in town.

SHIRE OF MEEKATHARRA

- Investigate development of a mountain bike trail from town to Peace Gorge, via 'back tracks'.
- Create a geo cache trail in around town.
- Investigate sites to promote as 'bird viewing' sites (e.g. 2-10km from town).
- Investigate with land owners the establishment of short stay (2-4 day) camping at Peace Gorge.
- Investigate free Wi-Fi in the town.
- Investigate funding for a native food forest as a community project and tourism feature.
- Investigate developing a half-day 4WD trail to key sites in close proximity to town.
- Investigate using a Shire bus to run a guided tour to ex-mine pits / sites / relics.

SHIRE OF MOUNT MAGNET

- Investigate with CMCA the gaps to address for Mount Magnet to achieve 'RV Friendly Town' status.
- Investigate re-development of the Old Hospital into a 'flashpackers' for families and backpackers.
- Investigate The Granites for camping, trails, guided tours and interpretation (e.g. geo park).
- Investigate ridges, breakaways and prominent landforms as day use, camping and lookout sites.
- Enhance existing day use sites by adding short bike / walk trails, picnic areas and BBQ's where appropriate.
- Explore the use of a Shire bus to trial guided art-culture tours in collaboration with Wirnda Barna.
- Investigate free Wi-Fi at selected sites within the Town and / or at popular day sites e.g. Granites.

SHIRE OF MURCHISON

- Create geo cache trails in around town and / or at popular day use sites (e.g. Errabiddy Bluff).
- Investigate with CMCA the gaps to address for Murchison to be an 'RV Friendly Destination'.
- Investigate establishing a half-day 4WD trail to feature sites / places in proximity to the town.
- Investigate day use amenities at Errabiddy Bluff and a mountain bike trail from town to the Bluff.
- Establish an astronomy 'kit' for visitors using the telescope e.g. Star Chart , App-GoSkyWatch, etc.
- Continue exploring funding AND concepts for the SKA-Astronomy Interpretive Centre.
- Investigate ways to build visitation to the Museum (e.g. flexi-opening hours; events, talks)
- Investigate free Wi-Fi at the Caravan Park store and in the adjacent parking area.



Bungarra at Murchison Settlement

SHIRE OF SANDSTONE

- Investigate the development of a botanical walk trail in-around Sandstone.
- Investigate with CMCA the gaps to address for Sandstone to achieve 'RV Friendly Town' status.
- Investigate re-developing the school into a camp school and/or 'flashpackers' accommodation for families.
- Investigate ridges, breakaways, waterholes and prominent landforms as day use and camping sites
- Investigate the addition of Chalets / Park Homes at the Caravan park.
- Investigate free Wi-Fi at selected sites within the Town.
- Investigate installation of a second dump point in town (i.e. outside the caravan park).
- Investigate a half-day 4WD trail in-around Sandstone to key sites.

SHIRE OF WILUNA

- Investigate with CMCA the gaps to address for Wiluna to become an 'RV Friendly Town'.
- Investigate potential new day-use sites that have been overlooked, undeveloped or inaccessible .
- Investigate potential camping sites on Pastoral, Reserve and Shire land (e.g. Lake Violet and Lake Way)
- Investigate using under-utilised areas of the Old Hospital as short stay accommodation, hospitality, etc.
- Create geo cache trails in around town and/or at popular visitor sites.
- Finalise plans for the Heritage-Interpretive Centre and proceed to develop and commission a new facility.
- Investigate the development of North Pool and 'The Crossing' as day use sites.
- Develop a 4-day 4WD Loop along CSR, Access Track #2 and Wiluna-Granite Peak Road via Lorna Glen.
- Investigate free Wi-Fi within Town.

SHIRE OF YALGOO

- Investigate with CMCA the gaps to address for Yalgoo to achieve 'RV Friendly Town' status.
- Investigate potential new day-use sites that have been overlooked, inaccessible or undeveloped.
- Investigate a new food themed event - "Goat and Roo Festival".
- Investigate ridges, breakaways and prominent landforms as potential camp sites.
- Create a geo cache trail in around town and / or at popular visitor sites.
- Upgrade the Rotunda area next to the Shire offices into a day use visitor-picnic area.



Warri and Yatungka - "last of the nomads", Wiluna

SHIRE OF UPPER-GASCOYNE

- Investigate with CMCA the gaps to address for Gascoyne Junction to be an 'RV Friendly Destination'.
- Investigate potential day-use sites that have been overlooked, undeveloped or inaccessible.
- Investigate establishing an eco nature walk trail in proximity to town (e.g. along the river to the river junction, back to town, 6-8km, 2-3hr walk).
- Investigate potential sites across the Shire for short stay camping including on Pastoral, Reserve and Shire land.
- Investigate free Wi-Fi near the Precinct store and in the adjacent parking area.
- Investigate sites for a visitor day use area near town with shade, BBQ, seating and eco toilet.
- Create a geo cache trail in around town.
- Investigate sites in proximity to town to promote as 'bird viewing' sites (e.g. 2-10km from town).



Eremophila, Kennedy Ranges



River in the Gascoyne

NORTH MIDLANDS SUBREGION

The action plan for the North Midlands subregion focuses on three key areas:

1. Marketing, branding and promotion;
2. Capacity building to attract and service higher levels of visitation; and
3. Improved standards and service delivery.

The following actions are prioritised and budgets are indicative 'best estimates' that could be jointly funded by Shire operating/capital budgets and supplemented by grants or in-kind contributions. The Shires and the respective CEO's may consider establishing a memorandum of understanding (MOU) to provide a framework for 'regionalising' the Plan. Actions for each respective shire have been listed on the following page.

ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES
MARKETING, BRANDING & PROMOTION				
Assign Australia's Golden Outback to co-manage promotion ^o of the North Midlands and Wildflower Country.	H Start: 2015 Finish: ongoing	Shires via MOU	\$5,000 each Shire; Total \$30,000p.a. AGO will match it with \$30,000p.a.	Targeted promotional campaign. Increased visitation.
Re-design and standardise each Shire's (DL-size) Tourism Brochures.	H Start: 2015 Finish: 2017	Shire CEO's	Standardised template. Graphic designer. \$4,000 for 8000 brochures.	Common format-layout of brochures. Positive feedback from visitors.
Establish multiple outlets in towns to distribute brochures / planners and tourism information.	M Start: 2015 Finish: 2016	Shire CEO's	Estimated cost: <\$500 per town	More outlets with tourism information. Positive feedback from visitors.
Establish a Facebook page "Everything Wildflower Way" and update regularly.	M Start: 2015 Finish: 2016	Shire CEO's	Estimated Cost: <\$500	Number of Likes / Comments. Positive feedback from visitors.
Redesign Wildflower Way Planner [^] with stronger emphasis on maps, site locations, way finding, itinerary options, suggested routes, etc.	M Start: 2015 Finish: 2016	Shire CEO's		Increase in visitation and stays. Positive feedback from visitors.
Establish links to / from each LGA's website, the Wildflower Way website, Facebook page, etc.	M Start: 2015 Finish: 2017	Shire CEO's	Estimated cost: <\$500	

* H – high priority; M – medium priority; L – low priority

^o For example, at interstate trade and consumer shows, in lift-outs and special promotions in Statewide newspapers, at selected overseas trade fairs/consumer events, at trade promotions with wholesalers / promoters, and at forums/events targeting interstate travellers. Emphasis should be on promoting Wildflower Country and the North Midlands.

[^] For example, assign each town a two-page spread / map showing major-minor routes, key sites / places of interest, half-full-2 day itinerary options, accommodation-RV-camping sites, hospitality sites, walk trails, etc

CAPACITY BUILDING						
ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES		
Investigate and encourage refurbishment of under-utilised Shire-owned buildings for short stay accommodation.	H Start: 2015 Finish: 2019	Shire CEO's		Increase in accommodation capacity. Positive feedback from visitors.		
Conduct an audit of potential and existing camp sites and develop/upgrade suitable sites.	H Start: 2015 Finish: 2019	Shire CEO's	Estimated cost: \$20,000 audit and development plan	Increase in camp sites / capacity. Positive feedback from visitors.		
Re-invigorate the Wildflower Country Group ^o	H Start: 2015 Finish: 2016	Shire CEO's Community		New members & structure enacted. Actions implemented.		
Investigate upgrading existing or developing new trails that help lengthen stay in the region.	M Start: 2015 Finish: 2019	Shire CEO's		Increase in camp sites / capacity. Positive feedback from visitors.		
Encourage farms / landowners to allow visitor access to day-use visits / places of interest.	M Start: 2015 Finish: ongoing	Shire CEO's		Increase in places to visit / attractions. Increase in visitation and stays.		
Investigate how the region can fund & resource an EDO / CDO / TDO for 3-4yrs. [^]	M Start: 2015 Finish: 2018	Shires via MOU	Estimated cost: \$100,000p.a.	TDO appointed full or part time. Regional tourism initiatives actioned.		
Investigate becoming RV Friendly Towns (i.e. those not already RV Friendly).	M Start: 2015 Finish: 2017	Shire CEO's	Estimated cost: \$5,000-\$10,000. Dump points available from TWA / CMCA.	RV Friendly accredited. Increased visitation / stay by RV's. Positive feedback from visitors.		
Investigate locations where undeveloped or overlooked day use sites [~] can be made accessible and amenity improved.	M Start: 2015 Finish: 2018	Shire CEO's		New sites opened up. Regular visitation by tourists.		
Investigate free Wi-Fi in towns for visitors who patronise local stores (i.e. receipt shows password)	M Start: 2015 Finish: 2018	Shire CEO's		Local shops participating. Increase in sales / visits by tourists.		
Investigate how local sustainability initiatives can be leveraged via seminars, voluntourism, research events, etc.	L Start: 2016 Finish: 2019	Shire CEO's		New events / activities introduced. Patronised by tourists. Positive feedback from visitors.		

* H – high priority; M – medium priority; L – low priority

^o Standardise meeting dates (2nd Tues, bi-monthly), standardise agenda, establish a secretariat, 1 x LGA CEO attendance at each meeting, encourage proxies (stand-ins), invite members from other economic / business groups, adopt 12-18 month action plan and focus on achievable outcomes, aim to deliver sub-regional benefits

[^] For example, a recent graduate or 'junior officer' shared across Shires; co-funded by in-kind, cash and community support; mentored by local leaders / champions and Shire executives; working on regional-collaborative tourism projects (e.g. grants, planning, project management, reporting); participating in the Wildflower Country Group and MWTA;

[~] For example sites with permanent waterholes, lookouts-vistas, unique land formations, flora / fauna / bird hotspots, fossicking – prospecting, walking-biking, shaded picnic areas, cultural sites, unique flora, etc.

STANDARDS & SERVICE DELIVERY					
ACTION	PRIORITY* & TIME FRAME	RESPONSIBILITY	TASKS & RESOURCES	MEASURES	
Encourage – support local businesses in achieving T-QUAL accreditation.	H Start: 2015 Finish: 2017	Shire CEO's		T-Qual Accreditations. Positive feedback from visitors.	
Explore delivering region-wide training in service, quality, tourism value and visitor safety.	M Start: 2016 Finish: Ongoing	Shires via MOU Shire CEO's	Create new or access existing programs. ^o	Training approach identified. Training program commenced.	

* H – high priority; M – medium priority; L – low priority

^o Examples include <http://www.austrade.gov.au/Tourism-and-business/T-QUAL/Accreditation> ; <http://aussie-host.com.au/en-us/ourproducts/courseprofiles.aspx> ; http://www.ahawa.asn.au/training/wa-service_with_a_smile.phtml ; <http://www.tourismcouncilwa.com.au/events> ; Creating new could be in partnership with groups such as CMCA, Tourism Council WA, WA TAFE.



Coorow Hotel

Initiatives that individual Shires should monitor and / or develop into new infrastructure / activities / experiences, independently or in partnership with respective authorities or land owners, are listed below.

SHIRE OF MORAWA

- Continue to work towards gaining accreditation as an RV Friendly Town.
- Continue to explore upgrading and promoting the airstrip / airport as a destination for recreational flyers; and packaged meals / accommodation in town.
- Continue to support MEEDAC and the possible development of food tourism and / or visitor engagement.
- Continue to pursue development of the Morawa-Perenjori Trail project.
- Continue to explore the development of activities-experiences for kids as an avenue to attract families; promote the youth centre, pool and skate park in day trips / itineraries; explore movie nights for kids during school holidays.
- Continue to explore initiatives that support / grow local businesses and / or encourage start-ups including training, workshops, mentors and networking.

SHIRE OF COOROW

- Continue to explore the development of road side rest areas with amenities and day use facilities.
- Continue to upgrade coastal campsites; e.g. Little Anchorage and Billy Goat Bay; install signage and promote; appoint a seasonal caretaker during peak periods.
- Continue to work towards Coorow gaining accreditation as an RV Friendly Town.
- Encourage shops, stores and outlets in town to become as information nodes, displaying tourism brochures, planners and maps and offering assistance to visitors.
- Develop a collection of self drive routes to caves, windfarm, wildflowers, coast, nature reserves, heritage sites, etc with overnight accommodation options at campgrounds, caravan park, hotel, farm stays, etc and promote in the brochure and Planner.
- Investigate potential sites / places of interest within the Shire that could be added to self-drive routes or itinerary options; explore sites / places on private land.

SHIRE OF PERENJORI

- Continue supporting and growing the 'Blues for The Bush' event; explore additional partnerships and event features that build awareness and patronage.
- Investigate trialling movie nights with hired / loaned equipment, either during peak visitor periods or to coincide with local events.
- Investigate the development of local tours, on foot or guided self-drive, visiting places steeped in local history, folklore and nature, and / or including farms to view relics / machinery / landforms / local produce / cuisines.
- Commence working towards gaining accreditation as an RV Friendly Town; identify potential overnight stay and overflow areas and long vehicle parking.
- Encourage shops, stores and outlets in town to become as information nodes, displaying tourism brochures, planners and maps and offering assistance to visitors.
- Audit potential and existing campsites and identify the priorities to upgrade / formalise / promote for short stay visitors; subject to funding install directional signage, communal fire rings, benches and amenities.
- Audit potential and existing day use sites and attractions and identify priorities to upgrade with directional signage, amenities, walk / bike trail, picnic area, amenities, lookouts, bird hides where appropriate.



North Midlands

SHIRE OF MINGENEW

- Continue to upgrade tourist facilities / amenities at the Depot Hill / Irwin River crossing; consider installing picnic area, short walk trail, BBQ, toilets, 24hr rest area, long vehicle parking bay, shade shelter, etc.
- Continue working with Aboriginal groups upgrading Little Well site and include in promotional materials; investigate guided tours during peak periods (i.e. school holidays) facilitated by local Aboriginals; investigate linking similar Aboriginal heritage sites into a self-drive trail across the North Midlands.
- Encourage shops, stores and outlets in town to become as information nodes, displaying tourism brochures, planners and maps and offering assistance to visitors.
- Continue to promote-advertise accommodation options across the shire including caravan parks, farm stays, hotel-motel, B&B's, campgrounds, overnight rest bays and RV friendly sites.
- Investigate upgrading the Shire website with more detailed information for visitors; map downloads, accommodation lists / contacts, half-full-two day itinerary options, self-drive route options, picnic rest areas / bush walk sites, RV Friendly sites and amenities / dump point sites and walk/bike trails.

SHIRE OF CARNAMAH

- Continue to promote accommodation options across the shire including caravan parks, farm stays, hotel-motel, B&B's, campgrounds, overnight rest bays and RV friendly sites.
- Continue to develop overnight rest bays, RV stopover sites and free camp sites within proximity to major attractions and places of interest.
- Encourage shops, stores and outlets in town to become as information nodes, displaying tourism brochures, planners and maps and offering assistance to visitors.
- Continue to investigate access to sections of coastline currently inaccessible by vehicle; explore the development of picnic areas / day use sites, short stay camp sites, small boat / dinghy launch sites, shaded rest areas, BBQ sites, etc.
- Continue to develop / upgrade walk trails in Carnamah, including the creation of multi-use trails where appropriate.
- Investigate upgrading the Shire website with more detailed information for visitors; map downloads, accommodation lists / contacts, half-full-two day itinerary options, self-drive route options, picnic rest areas / bush walk sites, RV Friendly sites and amenities / dump point sites and walk/bike trails.

SHIRE OF THREE SPRINGS

- Continue to develop mine tourism opportunities such as the Talc Mine Lookout and promote widely in the Planner, brochure, maps and website.
- Continue to run competitive events such as the Western Desert Races Qualifier.
- Investigate screening Silo movies during school holidays and promote widely across the subregion.
- Continue to develop and implement the Heritage Trail; promote widely in the Planner, brochure, maps and website; and explore the use of (volunteer) trail guides during peak visitor periods.
- Continue to support development of the Mullewa-Wubin Road and Midlands Road as a Wildflower Way 'loop'.
- Encourage shops, stores and outlets in town to become as information nodes, displaying tourism brochures, planners and maps and offering assistance to visitors.
- Continue to enhance amenities at the eco caravan park and continue to promote the RV Friendly Town accreditation.
- Investigate co-funding 24hr 'swipe card' amenity at a local service station to ensure 24hr fuel supplies (i.e. when the service stations are otherwise closed).



Artbelt sculpture, North Midlands

SECTION 5 - GOVERNANCE

5.1 MANAGEMENT FRAMEWORK

Tourism in the Mid West has historically been administered by Shires working independently with minimal collaboration at the subregion or regional level. This has contributed to the Mid West's LGA-centric tourism approaches, disparate tourism aims, varied tourism resources and a comparatively low priority afforded to tourism.

Historically, the development of Mid West tourism has largely been the domain of seventeen LGA's, Visitor Centres, the Midlands Wildflower group, the GMOP group and Gascoyne Murchison Tourism Incorporated, the Kalbarri Tourism Association and the Department of Parks and Wildlife.[^] More recently the MWDC and the MWTA have taken a more proactive role in facilitating a collaborative approach to regional tourism development. Consultation with stakeholders across the Mid West investigated alternate management frameworks and the following is recommended as a way forward.

1. The Mid West Tourism Alliance (MWTA), comprising representatives from government agencies, local government, non-government organisations (e.g. CCI, ACC, AGO, AIMAC, MWAOA, Yamatji Regional Council), tourism industry representatives (i.e. operators), small business owners and regional stakeholders (e.g. industry, community, volunteers, NFP's, etc); collectively becoming a driving force in facilitating collaboration-cooperation among tourism stakeholders. The MWTA has a term of reference, charter, executive officer support, stakeholder representation and potential to solicit 'champions / community leaders' to be members. The MWTA will be instrumental in helping to facilitate support for the adoption of this tourism development strategy and in monitoring progress-performance during implementation of the strategy.
2. State government agencies such as DPAW, DoF, DCA and DOT have potential capacity to implement initiatives such as those recommended within this strategy and through government processes may receive funding to implement initiatives in the plan. Their participation and/or involvement during implementation will be critical.
3. Local government. Councillors endorsing the subregional and LGA action plans and assigning resources to initiatives falling within their shire and contributing towards the resourcing of subregional initiatives. CEO's and staff being responsible to implement the recommendations and initiatives in the plan, including initiatives that extend across shire boundaries (i.e. subregional outcomes).
4. Subregional tourism 'groups'. Mostly informal groups comprising shire staff, tourism operators and community stakeholders with responsibility and/or a commitment to action initiatives within their respective Shire and/or collaborate with neighbouring Shires and subregional stakeholders in sharing expertise, resources and capacity to implement subregional initiatives that extend across shire boundaries. Subregional tourism groups include the Wildflower Country, Gascoyne Murchison Tourism Inc. and the Upper Gascoyne Murchison Tourism Consortium.
5. OPTIONAL: Regional Tourism Officer. A full or part time position dedicated to implementing initiatives in this plan and resourced by collaborative Shires within a subregion. Primary role is to assist with grant funding, project administration and delivery and evaluation and monitoring of subregional tourism initiatives at the Shire and subregional level. Primary purpose is to boost capacity at the LGA / subregional level to help realise the desired outcomes of this plan. The officer position may be resourced by cash and in-kind contributions of several shires.
6. OPTIONAL: Regional Aboriginal Tourism Officer. A full or part time position dedicated to implementing 'Aboriginal tourism' initiatives in this plan and resourced by collaborative Shires within a subregion. Primary role is to work with Aboriginal Bodies / Entities, Communities and Aboriginal entrepreneurs building capacity to establish new Aboriginal tourism ventures, services and products across the region. Primary purpose is to help facilitate training-mentoring, external advice-support, grant funding and business development.
7. OPTIONAL: Subregional Tourism Enterprise Development Officer. A full or part time position within the Batavia Coast dedicated to helping facilitate the growth and development of tourism enterprises, start-ups and community projects. Primary role is to work with existing SME's, entrepreneurs, business networks and community leaders / champions to help with planning, start-up, marketing, quality, operations, etc. Primary purpose is to encourage the growth of new tourism products, services and capacity by helping foster enterprise growth and development.

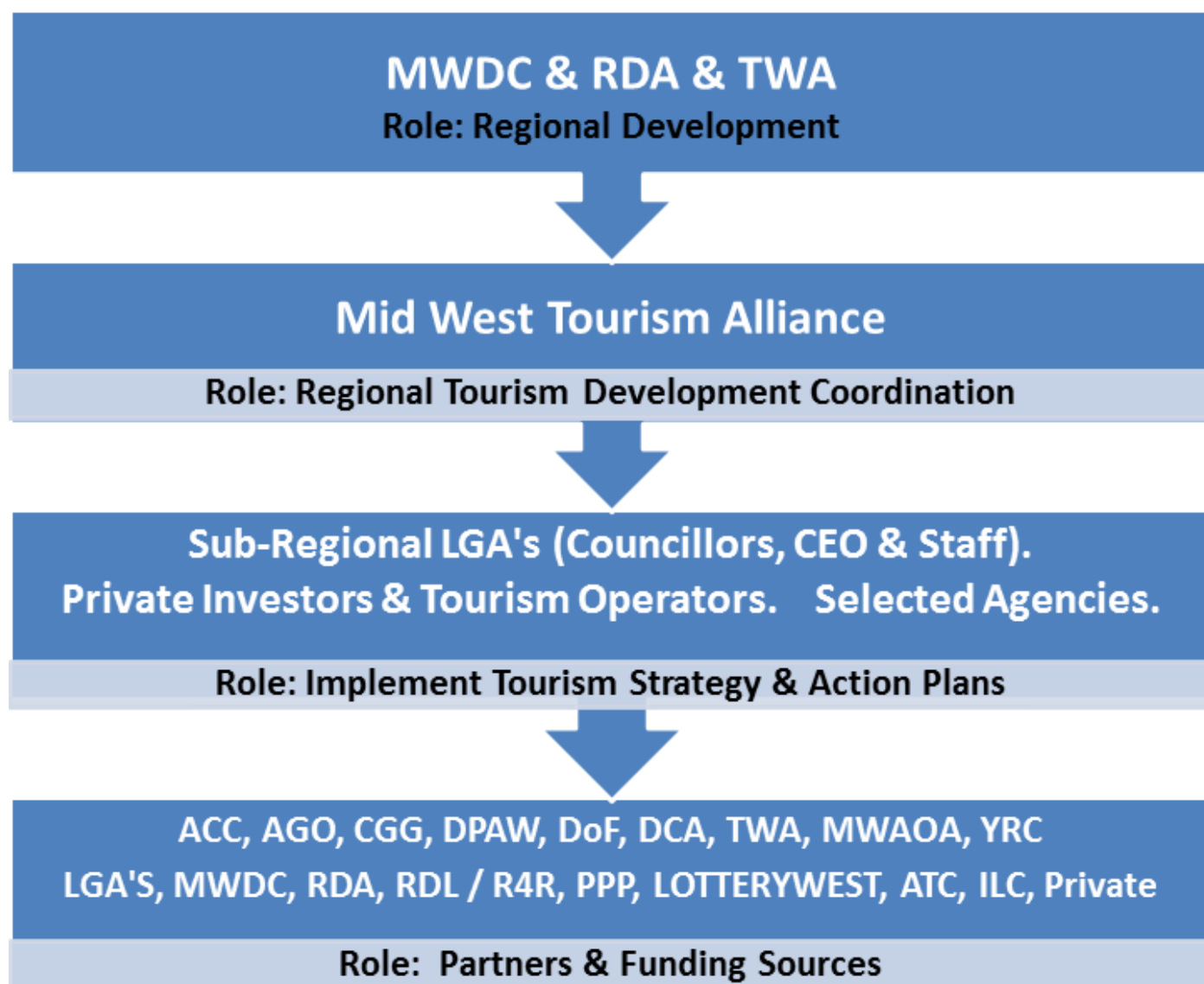
[^] Across the Mid West and the Gascoyne DPAW manages 5.7M hectares of land and water with \$54M of recreational assets and 7,800km of roads also valued at \$54M. DPAW recorded 1,589,120 visits in 2012/13.

Some LGA's may choose not to support the appointment of 'shared' regional tourism officers and may instead opt to enhance the tourism roles of existing staff-personnel by adding tasks relating to initiatives in this plan. Other LGA's have capacity to partly fund a 'tourism officer position' either in cash or kind and may collaborate with neighbouring shires by contributing staff resources, vehicles, office facilities and staff housing to collectively resource a tourism officer position.

LGA's in the Murchison subregion are working towards developing a memorandum of understanding (MOU) outlining the aims and principles of working collaboratively in developing tourism infrastructure, product and capacity across the region.

An MOU may eventuate within the Batavia Coast and North Midlands and may include for example, endorsing a tourism enterprise development officer or the basis (i.e. funding) to utilise a third party such as the MWCCI, Enterprise Connect or local specialists to act as facilitators of tourism enterprise, tourism infrastructure / product development and economic development initiatives outlined in this plan.

A suggested management framework to facilitate Mid West tourism development, based on the suggested approach, is shown below.



5.2 KEY SUCCESS FACTORS

The success of this strategy is contingent upon a number of key success factors listed and outlined below:

- Collaboration;
- Regional linkages;
- Market research;
- Marketing;
- Visitor Centres;
- Memorandum of Understanding;
- Key Performance Indicators, and
- Funding priority projects.

COLLABORATION

A regional approach to tourism will be important, if not critical, in bringing change across the Mid West. A program of gradually introducing a collaborative regional approach should be possible given the recent enthusiasm to establish the Mid West Tourism Alliance, the Murchison Upper Gascoyne Tourism Consortium and the continuity of the Wildflower Country Group. Potential approaches that could foster regional collaboration include:

- Adopting a standardised format holiday planner and brochure (i.e. across the Mid West) focusing on pre-trip planning, itinerary options (half / full day and 2-4 days), way finding information, conservation, visitor safety and engaging with the local community.
- Better utilise ACC and AGO to promote the Mid West with Shires contributing to an annual marketing fund for targeted promotion using newspaper / magazine advertisements, printed lift-outs, billboards, online banners, magazines, trade / consumer shows and collaborative marketing campaigns.
- Encourage broader distribution of information for visitors via visitor centres, CRC's, Shire Offices, libraries and local shops (e.g. service stations, newsagents, supermarkets, hospitality outlets). Creating 'information nodes' wherever visitors replenish after
- Become an RV Friendly region and encourage the dispersal of RV'ers to neighbouring towns and shires and promote travel across the region via the CMCA, clubs, forums, press and regional initiatives.
- Develop a range of east-west and north-south drive trails that extend across shires and subregions linking experiences, activities and accommodation and that reinforce a stronger focus on travel route options for RV's, 4WD's and cars.

- Region-wide promotion of visitor safety, 'Leave no Trace', conservation and engaging with local communities at clubs, venues, facilities, markets and events.
- Establish a website to facilitate online training in customer service, quality practices, tourism friendly, visitor safety, conservation and community; accessible to the broader Mid West tourism community and with capacity to support beginner to advanced levels.
- Establishing free Wi-Fi within regional towns to foster visitor's communication and promotion and to help overcome 'blackspots' in mobile coverage; enabling region-wide communication via towns as hubs; encouraging the use of social media and apps to aid travel planning; digitising the region's 'bush telegraph'. This may require a regional partnership with Telstra or iinet to host the Wi-Fi service.



Point Moore, Geraldton

REGIONAL LINKAGES

The vastness of the Mid West means regional linkages are potentially critical in growing tourism. Opportunities to facilitate linkages with neighbouring regions include:

- A self-drive route via Perth-Kalgoorlie-Leinster-Geraldton-Perth, with diversion linkages to key sites across the Mid West;
- Promoting 4WD trails to / from northern and central Australia that start / end in or near the Murchison (e.g. CSR, Gunbarrel Highway, Talawana, Great Central Road) and linking them to quality stopovers where 4WD travellers can convene, replenish and/or make repairs;
- Geo park extending from the Murchison into the Gascoyne (e.g. Mount Augustus);
- Promoting the wildflower way from Moora to Mullewa via the Midlands Road and a return loop via the Mullewa-Wubin Road and New Norcia etc;
- Kalbarri 4WD trail along the Zuytdorp coast linking with Shark Bay and the Ningaloo coast (i.e. and promoting it to southbound travellers);
- Mid West travel planners utilising feeder routes into the region to accommodate visitors enroute to the Mid West (e.g. recommending places to stop overnight while enroute to the region);
- WAITOC and successful Aboriginal tourism operators (from other regions) helping develop new Aboriginal tourism ventures / products in the Mid West;
- Promotion of the Indian Ocean Drive as a feeder route to the Mid West and linking in with coastal towns, sites and scenery while enroute.
- Promotion of self drive routes from the Gascoyne into the Murchison via Gascoyne Junction, Mount Augustus and Kennedy Ranges.
- Development of a geo trail Port Hedland to Mount Magnet via Marble Bar (and Rippon Hills / Skulls Spring Rd, aided by a detailed geology guide) and Newman.
- Promotion of regional airstrips suited to recreational light aircraft where accommodation is within close proximity; this could be developed into an aerial 'trail' stopping over at pastoral stations, regional towns and remote sites; utilising the collection of airstrips within the Mid West.

MARKET RESEARCH

The existing Mid West visitor data is based on Tourism Research Australia's (TRA) visitor survey program (i.e. IVS and NVS), which has recently changed by adopting ABS geography-population boundaries to collect and report regional tourism (i.e. geographic rather than LGA boundaries). Further, it is no longer able to provide reliable, consistent data on specific towns or subregions of the Mid West (i.e. that are based on LGA boundaries). Alternative 'local' approaches to tourism data should be adopted including:

1. Introduce a multi-faceted data gathering approach to provide localised data on Mid West visitors (e.g. an ongoing survey at selected popular sites, traffic counters at popular sites, feedback forms at popular venues / establishments, intercept surveys at popular events).
2. Utilise the VIC's and selected operators across the region to continuously gather data from visitors using a standardised questionnaire.
3. Collate VIC Bookeasy data, door-count data and in-store data from the larger VIC's and supplement it with data from the smaller VIC's (e.g. door counts and number of desk / email / phone inquiries).
4. A continuous survey of visitors using a pre paid mail questionnaire distributed from VIC's and selected outlets across the Mid West.

The collection of 1,500-2,000 valid survey responses annually would provide reliable, high quality data from across the region. The Mid West is encouraged to adopt a data gathering approach that over time highlights trends in visitor movements, routes, activities, profiles, preferences, expenditure, length of stay and visitor servicing.



Lattitude Gallery, Geraldton

MARKETING

Tourism marketing and promotion across the Mid West is mostly LGA-centric with the exception of the Wildflower Country where a subregional marketing approach is used and recommended. The Upper Murchison is moving towards a subregional marketing approach for 2015 onwards.

Scope exists for the Batavia Coast to introduce a holiday planner that combines Dongara, Geraldton and Kalbarri with a stronger emphasis on pre-trip planning (e.g. itinerary, accommodation, route, activity-experience options, budget options) and way finding (e.g. locations / directions / travelling to day trip sites, hospitality, tours, activity-experience site, trails). The Batavia Coast Planner could be produced twice yearly to suit peak and off-peak visitor periods, combining advertising support from across the Batavia Coast to offset production costs. Collaborative marketing with Australia's Coral Coast and Australia's Golden Outback would broaden the communication reach, help target specific visitors and strengthen subregional branding-identity.

Additional marketing approaches (options) include adding a minimum 4-5 sites / places from each shire to TWA's Experience Extraordinary App; installing large roadside billboards showing visitors experiencing idyllic Mid West locations; establishing social media programs for each subregion (e.g. Facebook page, Instagram, Twitter, You Tube channel); establishing subregional websites focusing on pre-trip planning and in-region way finding and holidaying (e.g. including information on weather, local news, transport / road condition, banking / ATM's, accommodation, health-medical and social / hospitality).

VISITOR CENTRES

Visitor centres (VC) across the Mid West are either partly or fully funded by local government. The primary purpose of a VC is distributing information, facilitating bookings, helping visitors enjoy a town or region, and to promote a town or region. The net benefit VCs deliver to a town or region is generally not measured but indications are their economic value can be significant and is often undervalued. However, financial sustainability is an elusive goal for VCs and rationalising-downsizing is commonplace. Technology has reconfigured the way information is distributed to visitors.

The 'next wave' of re-inventing the business model of VCs is by reconfiguring the way VCs interact with local tourism operators. Across the Mid West, the larger VCs should invest in delivering services that foster growth for existing and potential operators in a way that helps create and grow tourism ventures. The change is akin to VCs becoming a co-operative[^] delivering a range of services to members who are left to specialise in what they do best (i.e. run tours, accommodation, hire services, hospitality, etc). Creating a range of 'information nodes' across the Mid West will be pivotal in delivering visitor services (i.e. visitor information) and this will benefit from towns having free Wi-Fi that will enable visitors to access websites, social media, downloads and to communicate with peers.



Season Tree Cafe, Dongara

[^] For example, Broome VC offers a range of services to members including phone/email answering, bookings, managing daily tour schedules / accommodation loadings, collecting / remitting payments and co-designing marketing. Broome VC is aiming to further develop the way it collaborates with members in becoming more proficient in delivering services that members can safely outsource and yet continue to grow their business.

MEMORANDUM OF UNDERSTANDING

To assist in making the transition to a more collaborative approach to regional tourism development it is recommended that an agreement is established between LGA's in each subregion. The agreement or 'Memorandum of Understanding' (MOU) is expected to identify the primary areas for the LGA's to share resources, capacity and expertise in implementing initiatives that bring subregional benefits.

The MOU would include as a minimum:

- care-maintenance roles and resourcing for trails and sites crossing LGA boundaries;
- shire tourism staff undertaking familiarisation visits during low periods (i.e. to familiarise with the tourism offering of neighbouring shires);
- appointing Australia's Coral Coast and /or Australia's Golden Outback as the tourism marketing facilitator to implement an agreed promotion program with KPI's;
- shared cost and input to a subregional tourism website and holiday planner;
- achieving and maintaining RV Friendly Town accreditation across the subregion;
- jointly developing and adopting regional branding across multiple formats;
- endorsing regional support and steps to establish overnight accommodation at the Abrolhos Islands;
- establishing multiple outlets in each town distributing visitor information;
- endorsement of LGA participation in the Mid West Tourism Alliance and where necessary the establishment of LGA tourism sub-committees[^] in respect to the implementation of subregional tourism initiatives;
- encouragement for operators and business owners to work towards accreditation as a quality tourism venture (e.g. T-QUAL); and
- outline the basis for the appointment of a shared tourism development officer / enterprise development officer and endorsement of the strategies within the respective subregional tourism action plans.

The MOU should have a minimum five year term with an agreed minimum level of financial support from each shire annually.

[^] This may include re-activation of Murchison Tourism Inc. as the principal mechanism for operators, residents and stakeholders wanting to grow tourism across the region.

KEY PERFORMANCE INDICATORS

Monitoring implementation and progress of the strategy will require a range of key performance indicators. The action plans include measures for each initiative. In addition, there is often data that exists within a region and if captured in a subregional or regional reporting format (i.e. annually) could provide effective indicators of progress towards achieving the goals and objectives of the strategy. The recommended key performance indicators include:

- Shire-owned caravan park occupancy rates (supplemented with ABS accommodation data).
- Number of nights the overflow facilities are used and the number of campers-vehicles accommodated annually;
- Number of tourism brochures and holiday planners distributed annually via visitor centres and 'information nodes' within the towns (i.e. during peak and off-peak periods);
- Shire operated road traffic (vehicle) counters at popular day use sites, information bays and rest areas in towns;
- Number of visitor enquiries received by phone and/or email at the visitor centres, Shire offices and CRCs, annually;
- Tourism-related merchandise sales (\$) at the visitor centres and/or CRCs annually;
- Number of visitors accessing / entering the local museums and/or heritage displays annually (i.e. especially those operated by the LGA's); and
- Anecdotal measures from local business owners-operators e.g. sales, opening hours, stock levels, profitability, staffing levels, expansion plans, etc.

FUNDING PRIORITY PROJECTS

Alternative funding mechanisms are important and are encouraged in realising the development of tourism priorities and include:

- local government budget processes;
- private investment;
- public private partnerships;
- federal grants (e.g. Tourism Demand Driver Infrastructure funds);
- Royalties for Regions (Mid West Investment Plan, Regional Grant Scheme, WAITOC and TWAs proposed Aboriginal product development program);
- TWA's regional events funding scheme;
- Lotterywest;
- Partnering with community / social enterprises; and
- Miscellaneous State Government grants (<http://grantsdirectory.dlg.wa.gov.au/GrantsSearch.aspx>).

APPENDICES

- A. TOURISM AUDIT DATA**
- B. SWOT ANALYSIS**
- C. PREFERRED WA DESTINATIONS**
- D. COMPETITIVE ADVANTAGES**
- E. REMPLAN**
- F. TOP 21 TOURISM DEVELOPMENT OPPORTUNITIES**
- G. DPAW CONSERVATION ESTATE**

A. TOURISM AUDIT DATA

The tourism audit investigated the number and type of activities, attractions and accommodation in the subregions, which are shown in the following tables.

BATAVIA COAST

ACTIVITY	ATTRACTION	ACCOMMODATION
46	46	176

ACTIVITIES						
HERITAGE	NATURE	INDUSTRY	ADVENTURE	MARINE	WALK TRAIL	SPORT
4	10	1	8	10	4	9

ATTRACTIONS						
HERITAGE	NATURE	ART-CULTURE	ADVENTURE	Aboriginal	EVENT	FOOD
19	8	2	4	1	8	2

ACCOMMODATION					
HOTEL	MOTEL	CARAVAN PARK	HOLIDAY HOMES/UNITS	CABINS / CAMPSITES AND FARMSTAY	B&B AND BACKPACKERS
14	9	17	96	16	24

MURCHISON

ACTIVITY	ATTRACTION	ACCOMMODATION
14	41	35

ACTIVITIES						
HERITAGE	NATURE	ART-CULTURE	ADVENTURE	SELF-DRIVE TRAIL	WALK TRAIL	Aboriginal
6	7	1	4	4	4	2

ATTRACTIONS						
HERITAGE	NATURE	ART-CULTURE	ADVENTURE	Aboriginal	EVENT	RECREATION
25	12	4	2	3	4	

ACCOMMODATION					
HOTEL - PUB	MOTEL	CARAVAN PARK	STATION STAY	CABINS / CAMPSITES	B&B AND OTHER
9	2	7	8	3	2

NORTH MIDLANDS

ACTIVITY	ATTRACTION	ACCOMMODATION
40	109	40

ACTIVITIES								
HERITAGE	NATURE	ART-CULTURE	ADVENTURE	SELF-DRIVE TRAIL	WALK TRAIL	Aboriginal	MARINE / AQUATIC	SUSTAINABILITY
2	7	3	0	7	15	2	3	1

ATTRACTIONS					
HERITAGE	NATURE	ART-CULTURE	Aboriginal	EVENT	RECREATION
30	25	7	3	28	2

ATTRACTIONS CONTINUED		
SUSTAINABILITY	MARINE/AQUATIC	INDUSTRIAL TOURISM
5	3	6

ACCOMMODATION					
HOTEL -PUB	MOTEL	CARAVAN PARK	STATION STAY	CABINS/ CAMPSITES	B&B AND OTHER
7	1	11	1	15	5



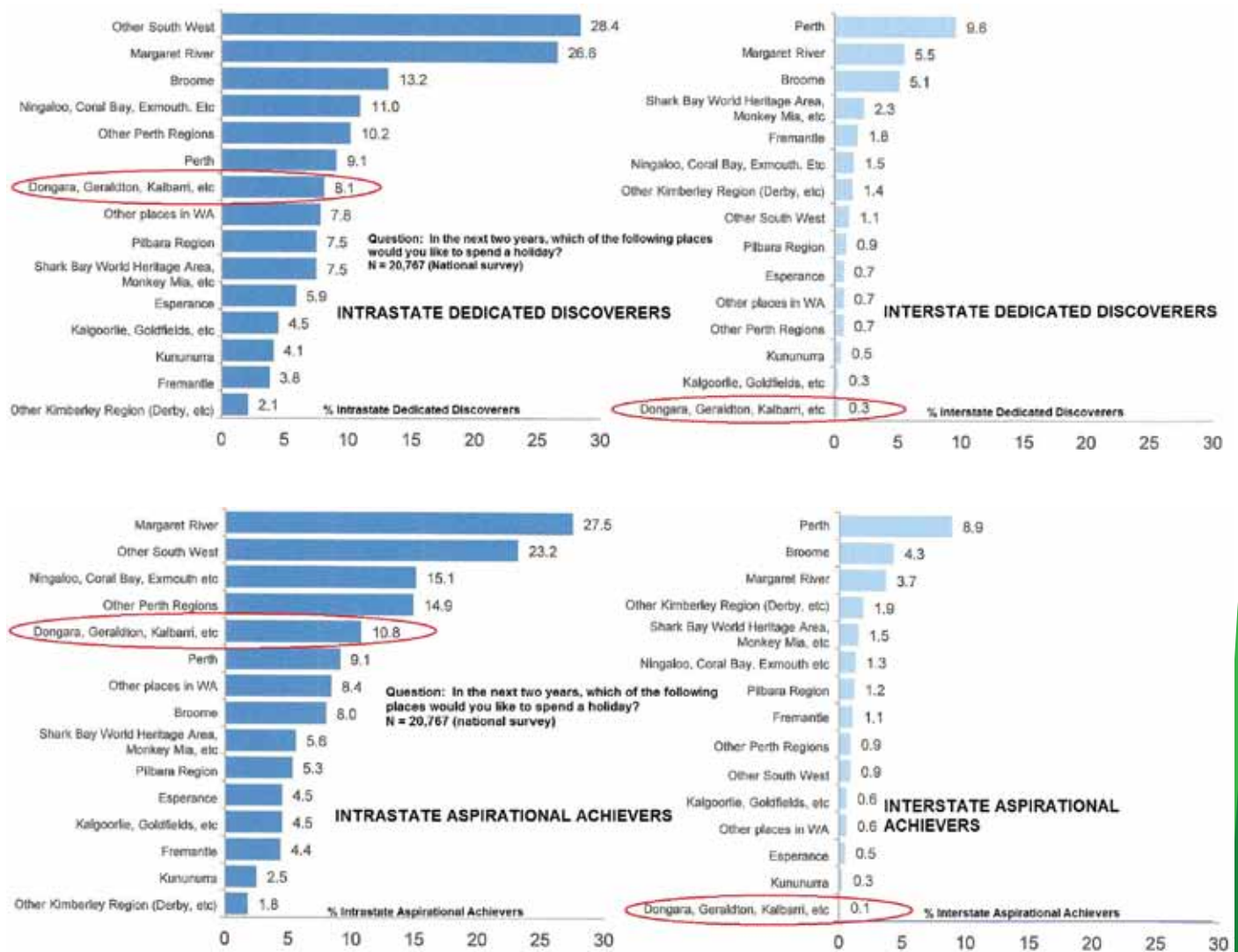
Geraldton Foreshore

B. SWOT ANALYSIS

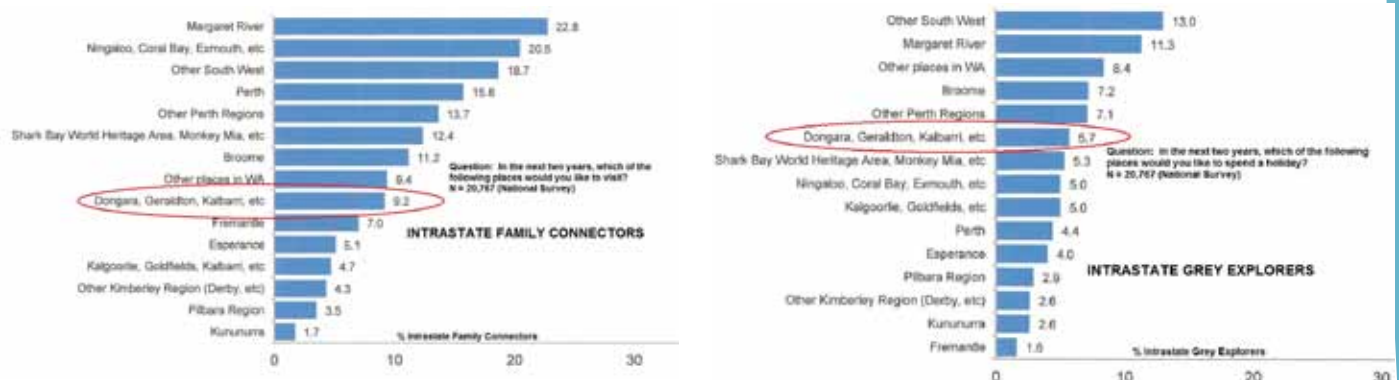
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • 4-5 hours drive from Perth, southern Mid West is close enough for weekend escapes. • Climatic differences give year-round options at inland and coastal destinations. • Hinterland's open spaces, abundant nature, clear night skies and network of towns. • Kalbarri is an iconic drawcard, a leisure-recreation epicentre and continues to improve. • 478,000km², from urban to rural to remote, city to towns to stations. Diversity. • Coastal towns are mature destinations with developed tourism infrastructure. • Growing seasonal migration of travellers passing north-south through the Mid West. • Impressive range of marine and terrestrial features to support year-round appeal. • Airport-airstrip network capable of delivering visitors near to places of interest. • Large network of sealed / unsealed roads to support a diversity of car / 4WD routes. • Inextricably linked to the Canning Stock Route and Gunbarrel Highway. • Favourable weather during seasons otherwise unattractive further south 	<ul style="list-style-type: none"> • Kalbarri and the Murchison, 600+km from Perth, have reduced appeal for weekend trips. • Mid West has lacked a compelling reason to attract visitors vis-a-vis its competitors. • Towns have competed with each other in striving to be stand-alone destinations. • Mining and pastoral operations 'lock up' land thus reducing the supply of sites/places. • Long drive to the northern hinterland and yet limited accommodation-camping options. • Mid West has no definitive branding / identity; lacks prominence in the minds of visitors. • Way finding, maps and signage are patchy making it trying for time-conscious visitors. • Operators & stakeholders under-estimate the value of tourism in local economies. • In the hinterland, mobile phone networks are town-based, limiting use by visitors. • Small towns in early stage of tourism lifecycle, with limited infrastructure & capacity • Cost of air travel to/from the Mid West is expensive and uncompetitive.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • More effective communication of a broader range of activities-experiences-amenities • RV Friendly status and increased camping options across the Mid West. • DPaW's conservation sites and eco-experiences expanding across entire Mid West. • Growing network of station stays with eco-geo-adventure tourism. • Very low impact eco-camps on Abrolhos enabling a range of 'iconic' experiences. • Leveraging coastal nodes Green Head to Kalbarri, capturing the appeal of the coast. • Events that extend across subregions and leverage key advantages of towns/areas. • Steady improvements to service, quality, visitor servicing, safety & conservation. • More diverse offerings to cruise ships resulting in 20+ visits to Geraldton annually. • Capturing innovative / adventurous Chinese visitors seeking eco outback experiences • Geraldton becoming a leading destination with diverse 'city' offerings & experiences. • Upper Murchison becoming a leading 'geo Park' of international repute. • Aboriginal communities creating a network of tours-offerings across a range of sites. • Upper Murchison becoming a leading astronomy destination (e.g. SKA). • Strong visitation year-round either in Mid West coastal or inland-outback areas. 	<ul style="list-style-type: none"> • Free/short-stay camping being discouraged and self-drive visitors bypassing the region. • Increased development of events Statewide leading to saturation and visitor apathy. • Limited resources of smaller Mid West LGA's slowing the development of tourism. • Mid West LGA's not collaborating-cooperating in building regional tourism. • Stations / farms shying away from tourism due to liability risks, staff shortages and costs. • Impost of licensing / regulations for nature based caravan-camp sites limiting uptake. • Slow or inadequate improvements to 'way finding' resulting in low / no growth in visitors. • Continued emphasis on mining-resource growth rather than development of tourism. • Small pool of volunteers in hinterland limiting community involvement in governance. • Sustained high Australian dollar making it cheaper for Australians to holiday abroad. • Sustained reliance on old accommodation facilities reducing regional competitiveness. • Increased camping impacting on biodiversity, flora and local ecosystems. • Inability to foster new tourism enterprises, defaulting to low-growth status quo. • Over-investing in urbanised areas rather than stimulating growth in the hinterland.

C. PREFERRED WA DESTINATIONS

Preferred WA destinations of selected visitor segments based on findings from the Roy Morgan Holiday Tracking Survey April 2012 to March 2013.



Preferred destinations in WA of selected visitor segments based on findings from the Roy Morgan Holiday Tracking Survey April 2012 to March 2013. Continued.



D. COMPETITIVE ADVANTAGES

Competitive advantages are the unique factors (i.e. resources, attributes or features) that a destination has vis-à-vis its competitors; they are important in how they are used to drive progress or performance at a consistently high level. The competitive advantages of the Mid West include:

1. 340km of coastline including protected beaches, dramatic cliffs, surf-coast, reef-lined shores, a port, safe anchorages, untouched coastal scrub, dunes and stretches of isolated beaches and shoreline.
2. The Abrolhos Islands complete with world-scale fishery resources, protected islands and coral atolls, significant heritage, National Heritage listed site and under-utilised infrastructure.
3. Geological diversity including world scale mineralisation (e.g. mining, prospecting, fossicking), unique landforms, significant gorges and ranges, and the oldest rocks on earth.
4. Extensive land area including large swathes rich in wildflowers, native flora and fauna, extensive river and creek systems and a large conservation estate; linked by a vast road network and a variety of airports.
5. Fifteen-plus towns, large and small, hosting a population of over 56,000 residents, spread across 478,000km², enabling 'hub and spoke' travelling across the region year-round, accessible from practically all points on the compass.
6. Established tourism destinations of Kalbarri, Dongara-Port Denison and Geraldton, with capacity to host significant visitation year-round.
7. A Mediterranean climate of cool wet winters and dry hot summers; strong coastal sea breezes in summer; and around 260 sunny days annually.



Nabawa, Chapman Valley

E. REMPLAN

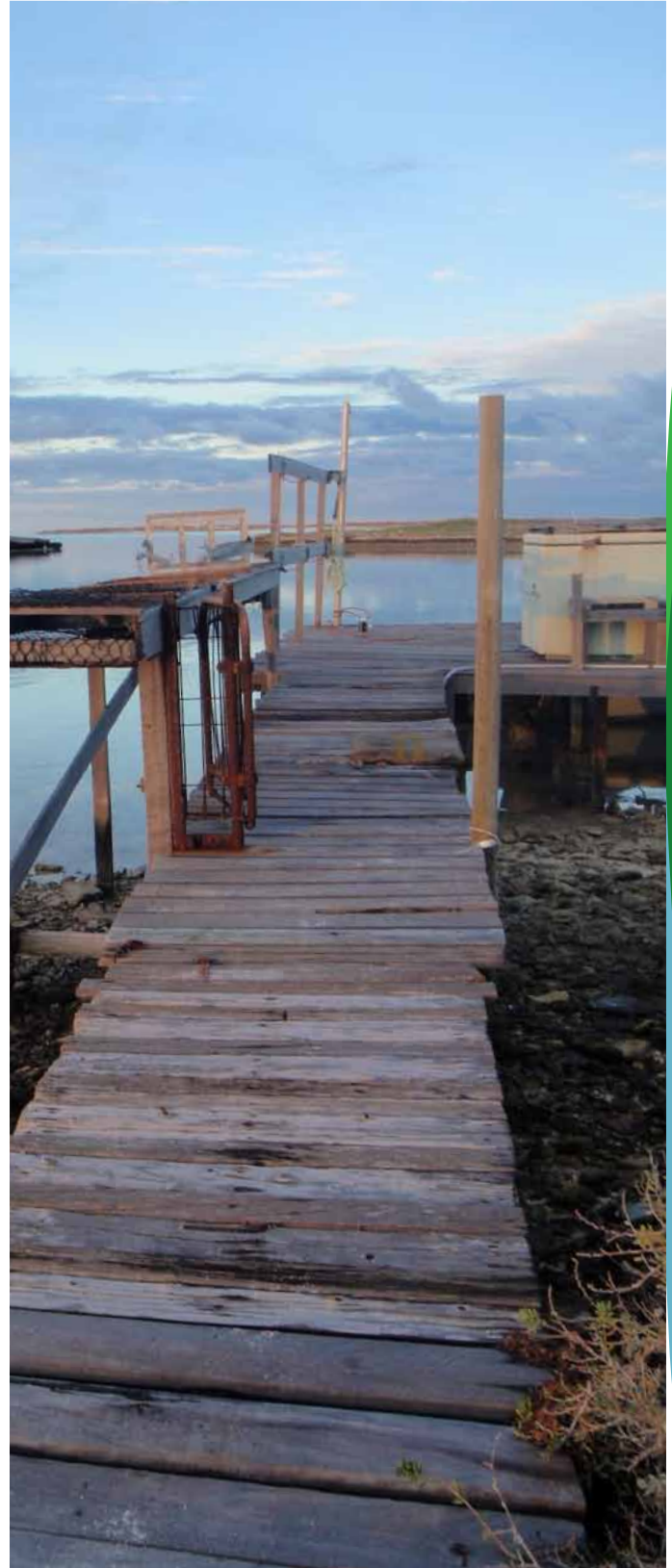
Economic assessment of the investment priorities employed REMPLAN,[^] Regional Economic Modelling and Planning System. The investment priorities for each subregion were scoped in terms of estimated incremental (i.e. additional) visitor numbers, visitor nights stayed and estimated investment cost.

Based on a comprehensive economic and industry database, REMPLAN uses economic modelling to estimate the economic outputs of investment options. In this instance the priorities were analysed and ranked based on the benefit-cost ratio, net benefit, sum of economic outcomes and the number of jobs created and later re-ranked against each priorities response to gaps, competition, trends and opportunities. A brief overview of the REMPLAN outputs follows.

- The economic outputs (e.g. benefits, jobs, value added) of each priority include the 'construction phase' (assumed to be one year's duration) and the 'tourism operating' phase, which typically extends for 20 years.
- Output is the quantity of goods or services produced in a given time period by a firm, industry or region.
- The number of jobs created includes the direct (e.g. sub-contractors, professionals, service providers, tour operators, etc) and indirect jobs (e.g. retail employees, cleaners, tradesmen, pilots, truck drivers, medical / health staff, etc) from the construction phase and from the operating phase arising from the flow-on effect of the investment and the operations. The number of estimated jobs reflects the broader range of employment generated during the construction and operating phases and includes much more than the personnel employed 'constructing' the proposed facility.
- The summation of economic benefits minus the estimated investment provides the net benefit. Benefit minus cost equals net benefit.
- The ratio of net benefit to investment provides the benefit-cost ratio.* In economic terms, a project with a net benefit and/or benefit-cost ratio greater than one is deemed a favourable use of scarce resources with net benefits exceeding the net costs.

- Modelling assumptions include: 50% of the capital expenditure and 100% of the recurrent costs (10%p.a.) are retained in the Mid West. All investment is fulfilled within one year's development program (i.e. the proposed developments are constructed and commissioned within a 12 month period).

The results from the REMPLAN analysis for the top 5-6 development priorities of each subregion are shown on a following page.



Abrolhos Islands

[^] REMPLAN uses data from the Australia Bureau of Statistics and other government agencies in modelling a wide range of industry sectors within a regional economy. <https://www.remplan.com.au/>

* The benefit-cost ratio is the value of benefits generated for every one dollar invested in developing the tourism priority. A positive benefit-cost ratio (i.e. greater than one) indicates a potentially beneficial investment. The net benefit is the dollar value of outcomes from investing in the tourism priority less the cost of the investment. The higher the net benefits the more beneficial is the investment.

F. TOP 21 TOURISM DEVELOPMENT OPPORTUNITIES

REMPAN RANKING	MID WEST DEVELOPMENT PRIORITIES	NET BENEFIT \$M	BENEFIT COST RATIO
1	Develop prospecting reserves in the Murchison	\$7.993	22.84
2	Develop geo tourism across the Murchison	\$11.169	17.18
3	Develop DPAW's Karara Block into a tourism conservation destination	\$46.102	8.38
4	Support Murchison pastoral properties to develop tourism infrastructure (e.g. 10-12 properties)	\$10.630	7.09
5	Develop 8-10 lookouts and safe viewing sites across the Murchison for flash events	\$4.513	4.10
6	Kalbarri to Shark Bay 4WD trail along the Zuytdorp Coast to Tamala / Useless Loop Road	\$8.392	4.00
7	Develop 3-4 half and full day self drive routes in the North Midlands with rest and overnight areas	\$9.789	3.92
8	Develop 4-5 eco campgrounds in the North Midlands	\$9.002	3.27
9	Develop tourism infrastructure on DPAW's three Murchison conservation blocks	\$21.282	3.04
10	Upgrade 3-4 North Midlands trails to multi-use (e.g. walk, bike and horse) to create new trails at popular sites	\$3.011	2.51
11	Extend the wildflower self drive trail along the Wildflower Way and Midlands Road creating a loop	\$1.565	1.79
12	Develop the Artbelt Project with hands on / interactive installations along the Mullewa-Wubin and Midlands Roads	\$2.174	1.74
13	Install an iconic skywalk lookout in Kalbarri National Park, finish sealing access roads, facilitate a naturebank eco camp, a new campground and enhanced trails	\$17.794	1.15
14	Develop cabins / chalets in North Midlands Shire owned caravan parks (e.g. install five ensuite cabins in each of five parks)	\$4.123	0.87
15	Develop cabins / chalets in Murchison Shire owned caravan parks (e.g. install five ensuite cabins in five parks - total 25 cabins)	\$4.123	0.87
16	Upgrade and enhance the amenity of 8-10 existing walk trails across the Murchison	\$2.251	0.64
17	Develop five coastal campsites and visitor nodes from Green Head to Kalbarri	\$1.611	0.50
18	Repair and refurbish 5-6 heritage buildings in Murchison towns for tourism use	\$4.551	0.43
19	Develop eco accommodation facilities on Abrolhos Islands (e.g. six 'micro' eco camps)	\$1.804	0.33
20	Upgrade the mobile phone network across the North Midlands	\$1.281	0.28
21	Headworks and pre-approvals for a Geraldton conference centre / business event hub	\$0.008	0.00

G. DPAW CONSERVATION ESTATE

The four 'Blocks' managed by DPaW in the Mid West that have potential to help grow tourism in the subregions are as outlined in the following table.

Property	Area (ha)	Status	Shire
MID WEST REGION			
Muggon Block			
Muggon	182,743	UCL	Murchison
Narloo	14,998	UCL	Yalgoo
Twin Peaks (Part)	27,300	UCL	Murchison
Wooleen (Part)	8,785	UCL	Murchison
Woolgorong	115,974	UCL	Murchison
Yuin ("Tardie") (Part)	59,977	UCL	Yalgoo
Total 6 properties	409,777		
Doolgunna Mooloogool Block			
Doolgunna	189,342	UCL	Meekatharra
Mooloogool	402,467	UCL	Meekatharra
Total 2 properties	591,809		
Dalgaranga Block			
Barnong	168,146	UCL	City of Greater Geraldton, Yalgoo
Dalgaranga	102,549	UCL	Yalgoo
Lakeside	51,528	UCL	Cue
Noongal	71,069	UCL	Yalgoo
Total 4 properties	393,292		
Karara Block			
Burnerbinmah	59,908	UCL	Yalgoo
Kadji Kadji	46,915	UCL	Morawa
Karara	109,291	UCL	Perenjori
Lochada	114,581	UCL	Perenjori
Thundelarra	156,128	UCL	Yalgoo
Warriedar	72,219	UCL	Yalgoo
Total 6 properties	559,042		
TOTAL	1,953,520		

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Mid West Tourism Development Strategy Public Consultation Summary

BACKGROUND

The Mid West region has various unique assets and aspiring nature based attractions providing an authentic experience for visitors. However the region's tourism has evolved unevenly and irregularly and the Mid West is yet to position itself strongly in the tourism market as a whole region.

The public sector is considered to have an important role to play in regional tourism, somewhat as a result of the fragmented, remote and seasonal nature of the tourism industry across the regions. Particularly in facilitating a favourable environment for tourism development with infrastructure investment that supports development of product. A range of government agencies contribute to this process, including Tourism WA (TWA), Regional Development Commissions, Local Government Authorities (LGAs), Department of (DoP) Planning, Regional Development Australia (RDA) and many more.

Funding from the above bodies led to commissioning of the Mid West Tourism Development Strategy. The aim was to identify the game changers, gaps and priorities that could help provide a favourable environment for tourism development in the Mid West.

The draft strategy recognised that Australia's Coral Coast (ACC) and Australia's Golden Outback (AGO) are the collaborative marketing organisations for the Mid West, under the umbrella of Tourism WA. These bodies are tasked with marketing and branding for the region, aligned closely to the State's tourism goals. The Mid West Tourism Development Strategy focuses on infrastructure / product / experience gaps acknowledging that priorities for regional marketing are the remit of ACC and AGO.



The development of the draft took a number of its cues from other complementary strategies that had been released by the Western Australian Government. The draft is directly linked to the Mid West Regional Blueprint, the region's growth and development plan outlining the high level aspirations for the Mid West. The Mid West Regional Blueprint aspiration for tourism is to 'attract one million visitors each year that stay in and enjoy the region for longer' facilitated by:

- Iconic attraction and destination development
- Product and experience development
- Investment ready attraction
- Connectivity
- Diversification and authentic connection

The WA Tourism 2020 Tourism Strategy aims to double the value of tourism in Western Australia from \$6 billion a year in 2010 to \$12 billion a year by 2020. Two of the seven outcomes are particularly relevant to the Mid West; to provide every visitor with the opportunity to have an Aboriginal tourism experience; and to increase visitors to regional WA facilitated by:

- Tourism support infrastructure in regional WA
- Australia's best regional events calendar
- Improved caravan, camping and self-drive experiences
- Extraordinary regional experiences, including nature-based, culinary and cruise shipping experiences

ACC and AGO's Tourism Development Priorities (2012-2015), LGA corporate plans, WA's Caravan and Camping Action Plan and WA's nature based tourism strategy provided further guidance.

In addition to engagement with the Western Australian Government, an external advisory group was established to inform and oversee the draft strategy – the Mid West Tourism Alliance. Membership comprised representatives from the Mid West Chamber of Commerce and Industry, Mid West Development Commission, LGAs, RDA, Visitor Centres and community.

Together these informed the development of the draft strategy built around five strategic aims:

1. Increasing accommodation capacity from camping through to resorts;
2. Opening up day use sites-places previously overlooked or under-developed to enhance the Mid West's appeal as a destination;
3. Improving the quality and distribution of information for pre-trip planning and way-finding;
4. Attracting more high-yield visitors and the growing self-drive and RV market; and
5. Increasing the range of aboriginal and eco-nature based tourism activities, attractions and experiences.



APPROACH TO CONSULTATION

From January to June 2014 consultations were completed with 60+ stakeholders by phone / email / face to face interviews with the consultants visiting each Shire in the Mid West across 478,000km². The work was further supported by desktop review and analysis of over 40 relevant strategies and plans including each LGAs corporate plan.

Further community input was gathered from three regional workshops spread across the region (Meekatharra, Mingenew, Geraldton) with over 85 participants. Prior to the workshops a discussion paper was disseminated to all attendees and all Shire CEO's across the region. Workshop participants were invited to work in groups to prioritise suggested development options and point out where further gaps existed.

Interim findings were presented to the Mid West Tourism Alliance for review.

The consultant finalised a list of priorities and development options for inclusion in the strategy based on their ability to address the known gaps, alignment with national and state tourism trends, social / economic / environmental benefits and modelling (REMPAN) outputs for each option (jobs, benefit : cost ratios).

The Draft Mid West Tourism Development Strategy was released for public consultation in August 2014 for a three week period to test views on the proposed areas of focus, as well as encourage additional ideas and solutions being put forward. Feedback was encouraged via radio interviews, MWDC website, Visitor Centre and Tourism WA newsletters, Mid West Tourism Alliance networks and by direct email.

Responses were collected using Survey Monkey with the following questions to help guide the community through the process:

- Do you view tourism as an important future economic driver for the region?
- Which category best describes your interest in the strategy?
- Indicate which subregion you reside in.
- A number of projects have been listed in the strategy. The top 6 are listed below. Please indicate what importance you place on each.
- Do you agree with the top 6 priorities? If not, why and what else should be included?
- In addition to the top 6 priorities a number of development options are listed in the strategy. Please indicate what importance you place on each.
- Do you believe there are further development options that would drive growth in visitor numbers and length of stay that have not been mentioned in the strategy, if so what are these?
- Do you see a role for your community / business / organisation in delivering any of the priorities or development options? If so which one and to what extent?
- Do you have any further comments to share?

The consultation summary is presented in this document and forms an appendix of the Final Mid West Tourism Development Strategy to guide future action plans.

PARTICIPATION

85 people participated in the regional workshops.

60+ people were interviewed by phone, email, face to face.

43 complete responses to the draft strategy were recorded by survey monkey.

During the public consultation period the draft strategy document was opened and viewed 249 times via the Mid West Development Commission site, one of the top five visited sites for the month of August.

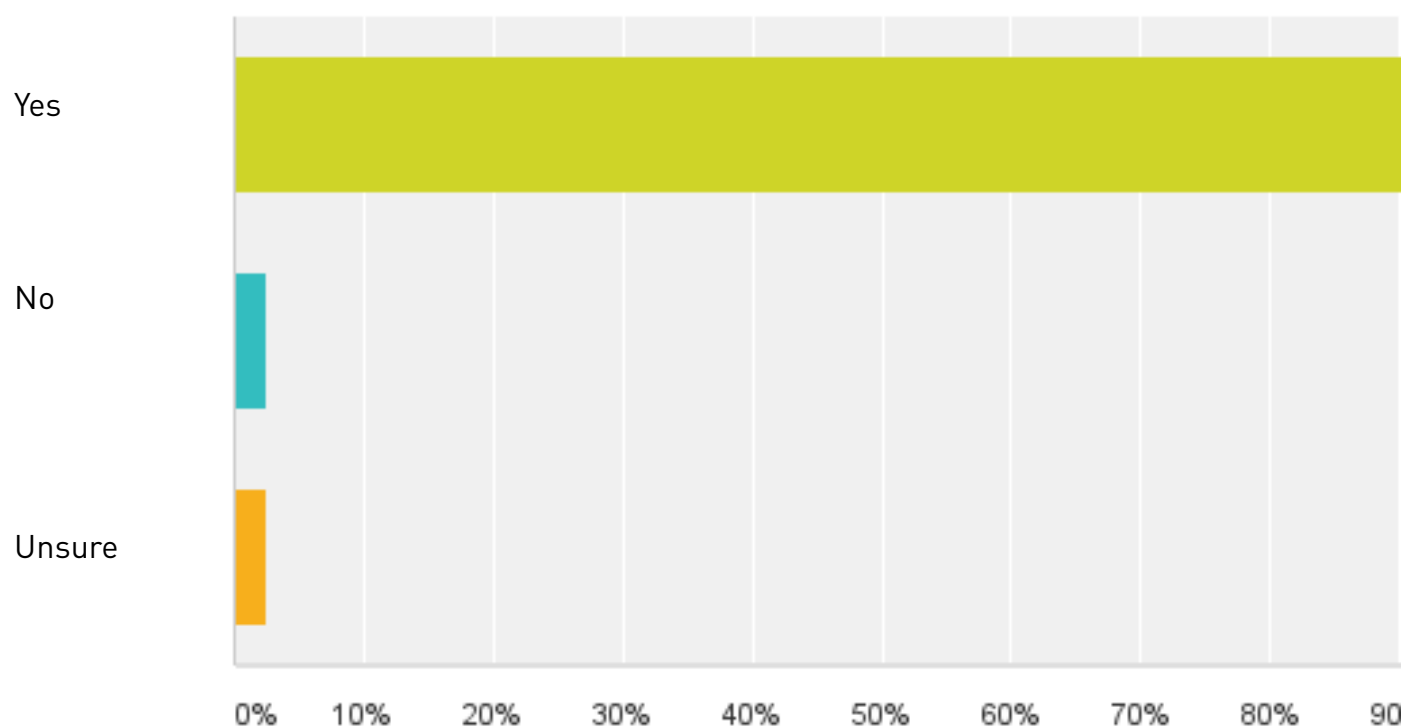
The consultant visited the following Local Government Authorities: Northampton, Chapman Valley, City of Greater Geraldton, Irwin, Mingenew, Carnamah, Three Springs, Eneabba, Coorow, Perenjori, Morawa, Yalgoo, Mount Magnet, Cue, Meekatharra, Wiluna, Murchison Settlement, Upper Gascoyne.

CONSULTATION FEEDBACK

Online feedback, written submissions and community engagement activities indicated that there was general support for a Mid West Tourism Development Strategy. A review of the written submissions found that there is also general support for the draft strategy's strategic aims, focus areas and development ideas. The Key findings are presented and discussed in the following pages.

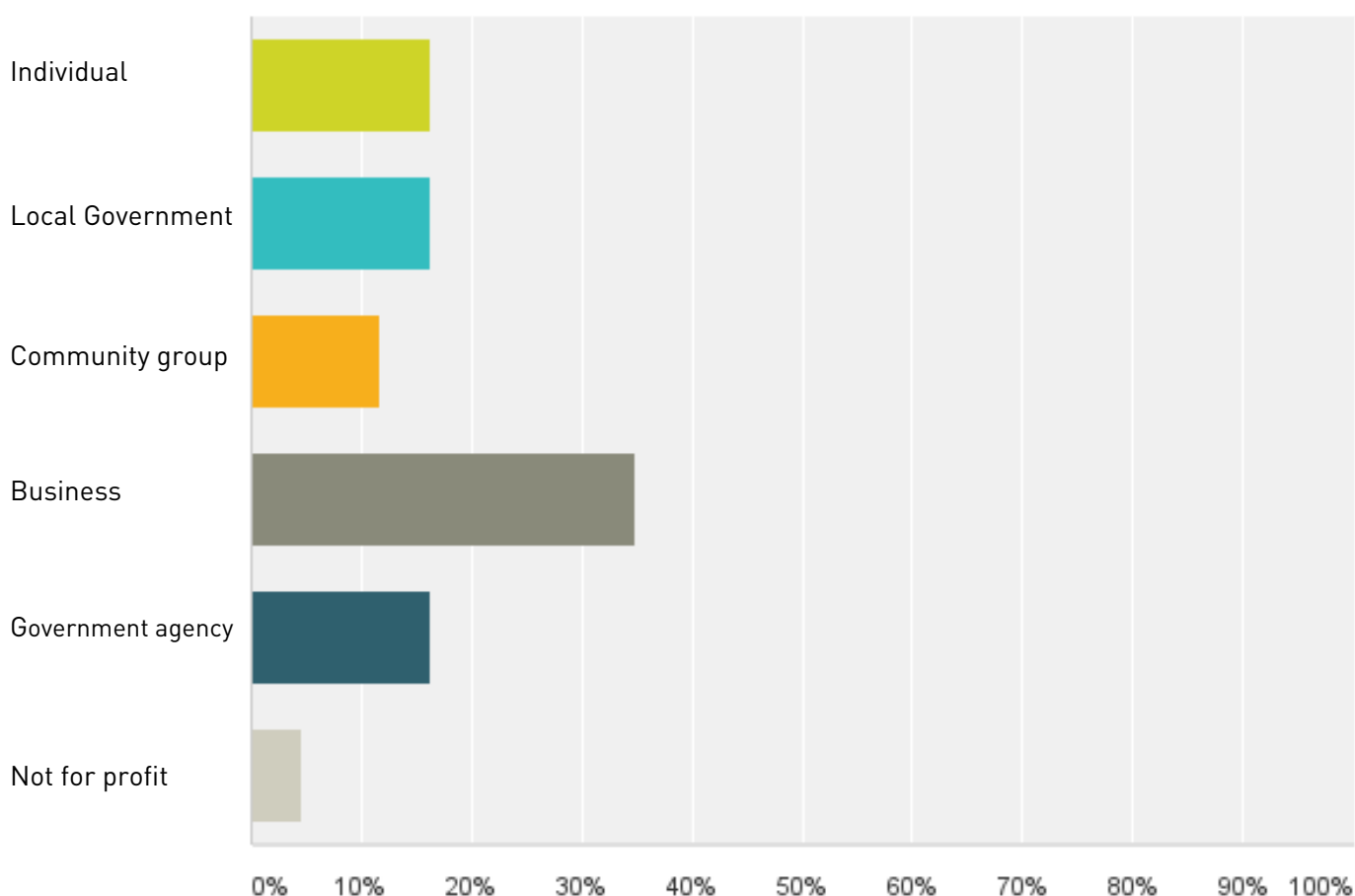
PROFILE OF RESPONSES

Respondents who view tourism as an important future economic driver for the region.



Out of the 43 responses received, an overwhelming majority (95.35%) agree that tourism is an important future economic driver for the region. The results support the case for a strategic approach to developing tourism across the subregions and the importance assigned to tourism in the Mid West Regional Blueprint.

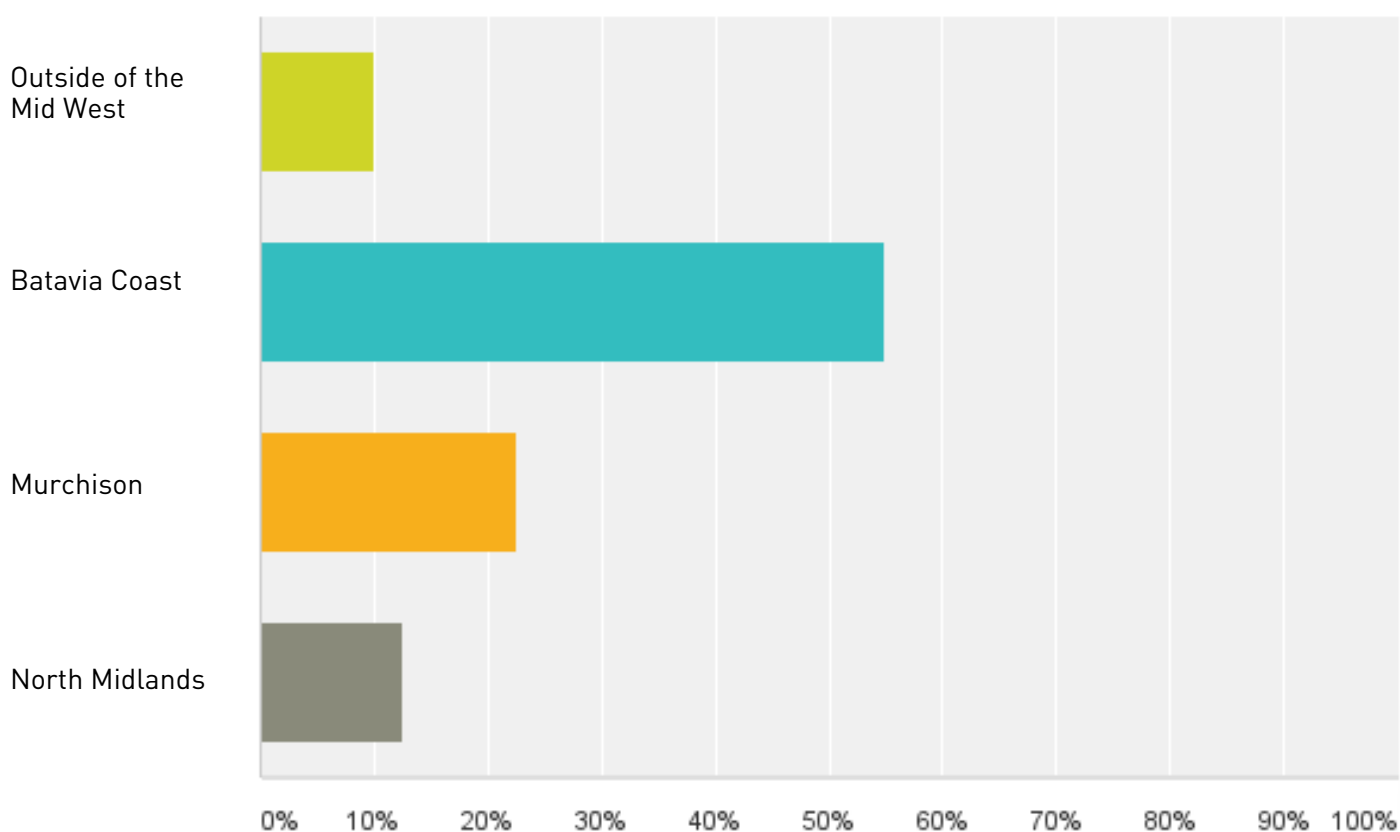
Organisational type



The majority of responses (34.88%) were received from the business sector, a reflection of the key stakeholders in the tourism industry. This highlights the importance of engaging the business sector to facilitate tourism development and the vital role peak bodies such as the Mid West Chamber of Commerce and Industry can play going forward in representing their constituents.

Remaining responses were fairly evenly spread across Local Government (16.28%), individuals (16.28%), community groups (11.63%) and Government agencies (16.28%), excepting the lower response from the not for profit sector (4.65%). On review it may have been more appropriate to combine the not for profit sector and community groups given that some respondents may have seen these as one and the same.

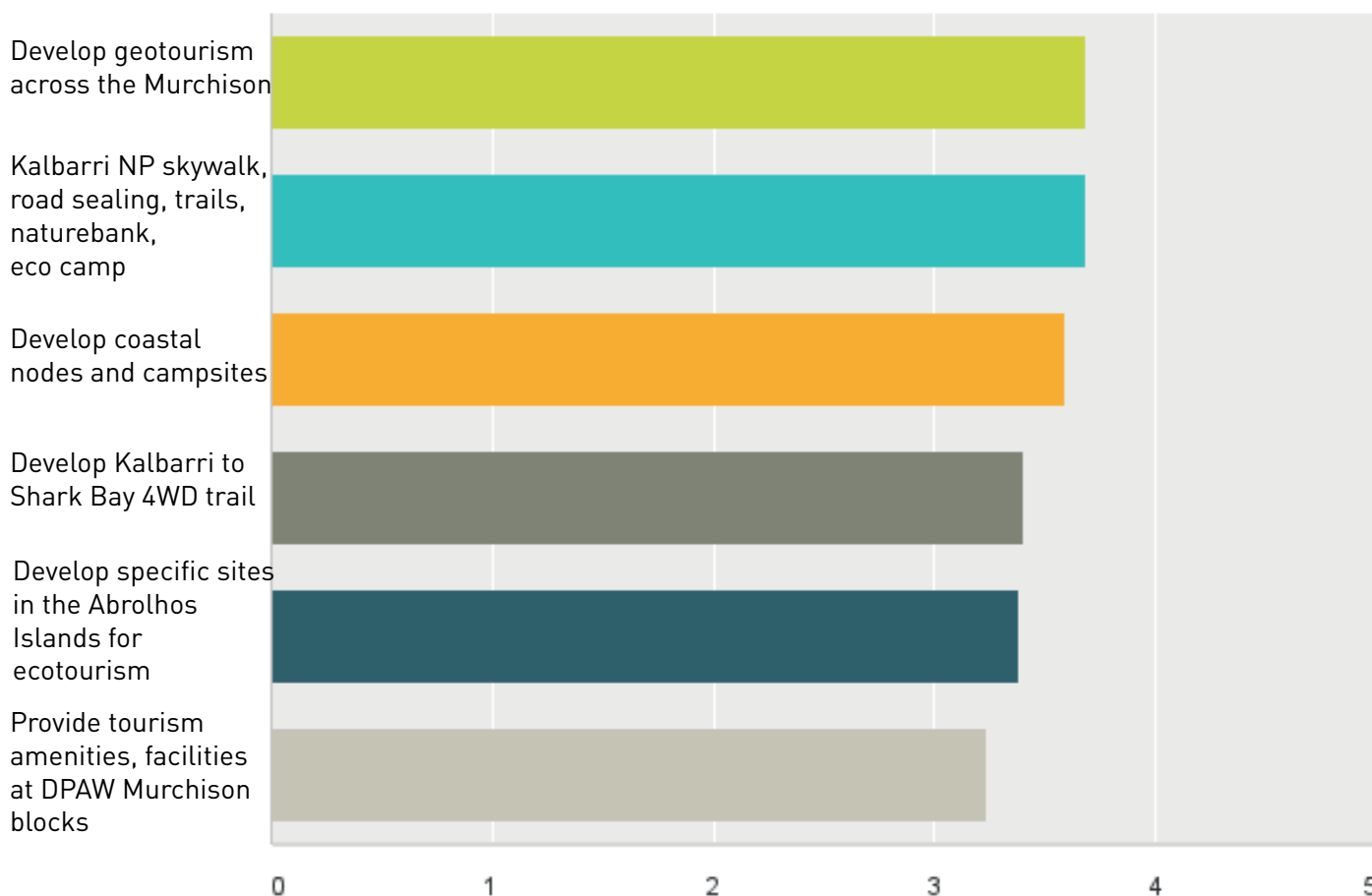
Responses by subregion



The majority of the responses were received from the Batavia Coast (57.14%) which was not unexpected given that the majority of the Mid West's population (84%) reside in the subregion. The response rate from the Murchison (21.43%) was relatively high given that this subregion is host to a much smaller 8% of the regional population. The Murchison accounts for 89% of the region and whilst in the past mining and pastoral activities have been the main economic drivers across this vastness, there is an emerging outback tourism sector, reflected by the responses. North Midlands responses (11.90%) were half that of the Murchison even though the subregion also hosts around 8% of the region's total population. This may be an indication of agricultural production traditionally dominating the industry sector with tourism still in the development phase. In making these assumptions it is important to note that the response rate is not high enough based on population to draw statistically significant conclusions from and the results are very much a general guide.

TOP SIX PRIORITIES

Importance assigned to each of the suggested priorities in the strategy.



The community was asked to consider the importance of each priority in the context of significant gaps/priorities, alignment to State and National trends, potential 'game changers', suitability to public investment, and capacity to attract and retain visitors longer in the region (criteria from pg 1 of the survey).

A matrix rating scale was employed with the following weightings: 'unsure' – 1, 'low' – 2, 'medium' – 3, 'high' – 4 and 'very high' – 5. 42 responses were received. Based on average ratings the most supported priorities are:

- Geotourism in the Murchison (3.68) and
- The development of an iconic skywalk in Kalbarri National Park, sealing of roads, facilitation of a naturebank eco camp, new campground and enhanced trails (3.68).
- The least supported initiative was:
- Provision of tourism amenities and facilities at conservation blocks (Karara, Muggon, Doolgunna Mooloogool, Dalgaranga) to increase camping options and experiences in the Murchison and North Midlands (3.24).

Data was cross referenced to the respondents subregion to determine any parochialism, indicating some level of natural preference towards those priorities occurring within the respondents own 'patch'.

Table 1: top two	Batavia Coast	Murchison	North Midlands
1	Kalbarri NP iconic skywalk road sealing etc	Geotourism across Murchison	Increasing access to coastal nodes and developing a number of short stay eco camps
2	Geotourism across Murchison	Kalbarri NP iconic skywalk road sealing etc	Develop geo tourism across the Murchison (equal to tourism facilities at conservation blocks)

Although only small sample numbers, the varied results (Table 1 and 2) highlight the difficulties of considering three very distinct subregions in one strategy.

Table 2: Average ratings by subregion	Geotourism across Murchison	Kalbarri NP iconic skywalk road sealing etc	Abrolhos Islands eco tourism	Zuytdorp coast 4WD trail	Coastal Node eco site development	Tourism facilities at conservation blocks
Batavia Coast (22)	3.91	3.96	3.79	3.48	3.63	3.33
North Midlands (5)	3.60	3.20	3.40	3.20	4.20	3.60
Murchison (9)	3.67	3.56	3.11	3.44	3.44	2.89

SHARED THEMES ACROSS THE REGIONAL PRIORITIES

A number of respondents were concerned that priorities did not include a comprehensive regional marketing approach. This may indicate a need for better awareness of the role of the Australia's Coral Coast and Australia's Golden Outback and perhaps better engagement with key stakeholders. Nine of the Mid West LGAs are in Australia's Golden Outback, eight LGAs are in Australia's Coral Coast (ACC) region. Both Regional Tourism Organisations are specifically tasked with the marketing of the region and hence this strategy did not focus on the marketing gaps, rather the gaps in experiences, infrastructure and activities.

However it may be appropriate for more strategic Mid West focussed marketing given the perceived dilution of the region in marketing campaigns i.e. *'If this is to implemented then redesign the regions for Tourism to incorporate just the Midwest.'*

Whether each subregion should be considered in separate strategies was raised a number of times given the *'mix of areas'*. Again this highlights the difficulties of considering three distinct subregions in one strategy in an appropriate and equitable manner. Comments included:

- *The top 6 priorities are not in our favour. Of the 6 only 2 relate to the Murchison.*
- *Considering Geraldton is the largest town in the whole area the strategy covers, it is disappointing to not see it mentioned in the top 6 priorities. Accommodation and infrastructure are missing here. The top 6 are heavily Kalbarri and Department of Parks and Wildlife.*
- *The top 6 priorities are very "Geraldton" centric and there is very little here that supports the outer Murchison region other than "geo tourism" which is a low priority compared to other strategic needs in some Murchison areas like Wiluna.*

Other responses to specific priorities are summarised below:

General themes from public feedback

Develop geo tourism across the Murchison (collective promotion of geological heritage, geo trails and the world's oldest rocks)

General support was indicated for geotourism, specifically including the Dalgara meteorite crater, the potential linkages through a Zuytdorp 4WD trail, connections to astronomy, geology and aboriginal culture.

However there was some concern that it will *"cost bucket loads...with no short-term gains for a region that is desperate and crying out for results now."*

Provide tourism amenities and facilities at conservation blocks (Karara, Muggon, Doolgunna - Mooloogool, Dalgara) to increase camping options and experiences in the Murchison and North Midlands.

There was much discussion on this point and whether it is appropriate, receiving more comments than any other. There was general concern that the suggestions were 'Parks' focused and this was not seen as a priority by most i.e.

- *Appears this should be a DPAW responsibility and resourced by that department specifically.*
- *I'm uncertain I can see any future in developing DPAW blocks.*
- *Perhaps it would be better to have included pastoral and other land owners in this priority and not limit it strictly to DPAW land.*
- *The conservation blocks should not be competing with ordinary privately funded pastoral stations for a slice of the pie.*

It may be appropriate for this priority to be reviewed by the MWTa based on the feedback.

Develop specific sites in the Abrolhos Islands group for eco tourism, opening up the iconic attraction to experience seekers.

No specific comments were received on the Abrolhos Islands.

Install an iconic skywalk (i.e Grand Canyon style) in Kalbarri National Park, finish sealing roads, facilitate a naturebank eco camp ('investor-ready' land for low impact accommodation), new campground and enhanced trails

Feedback from the written submissions was generally supportive for this priority. Emphasis was placed on the need for the road sealing program in the Kalbarri National Park especially if further development is undertaken. Concerns raised included visitor safety issues, need for increased parking and amenities to meet the needs of increased traffic and the tenure process to develop a new campground.

One respondent did not agree with the concept and felt there was already a main iconic feature, the Nature's Window, and the strategy should focus on areas that need to be promoted and enhanced to get them on the map as a place to visit.

Other respondents believe the overall Kalbarri National Park development, especially the roads and trails, was 'a must'.

Develop a Kalbarri to Shark Bay 4WD trail along the Zuytdorp Coast

According to the feedback, access and consultation will be key to progress of this suggested priority with a variety of sensitive areas to consider and logistical difficulties. Feedback highlighted an extensive previous feasibility report undertaken by Halpern Glick Maunsell (2001) and suggestions were made that the feasibility should be revisited or at least valued added to. A number of positive comments were received on this priority including:

- *Agree strongly with the need to develop an adventure road along the Zuytdorp cliffs with the possibility of boosting tourism to the entire region.*
- *The proposed Kalbarri to Shark Bay 4WD trail along the Zuytdorp Coast would be worthwhile if route connects with significant geology sites, which builds on Geo Tourism in the region.*
- *Build an adventure road between shark bay and kalbarri amd the tourism boost will be huge and long lasting. It could be the greatest drive in Australia with the magnificent scenery and history.*

Concerns raised included:

- *take into account approved road/trail setbacks and any pastoral or private land along this stretch.*
- *would benefit from further investigation into the feasibility of the project. Landholders must be consulted..then the logistics of access in this extremely difficult terrain, plus a few environmental issues.*

One comment was strongly opposed to the suggested 4WD trail:

- *difficult to implement and may do more damage by 'loving it to death'. The Zuytdorp wreck site is only accessible by written application and permit. Encouraging appropriate Aboriginal tourism businesses and product, with TO's and Aboriginal people at the heart, should be included.*

Open up' the Mid West coast by increasing access to coastal nodes and developing a number of short stay eco camps with minimal

One comment received: *The Midwest Coastal nodes are already fairly open in comparison to others along the WA coast. Shamefully coastal nodes tend to be areas that are overused by visitors and not respected. Careful planning, managing and ownership needs to occur. Coastal nodes also need to be connected to ... short round trip routes to bring people from the coast and inland among the Moresby Ranges.*



DEVELOPMENT OPTIONS

There are obviously a large range of development options for the Mid West and the list presented in the strategy is not exhaustive. The strategy suggested a number of development options and subregional priorities based on:

- REMPLAN cost benefit analysis;
- Their ability to address significant gaps/priorities;
- Alignment to State and National trends;
- Suitability to public / private investment, and
- capacity to attract and retain visitors longer in the region (the criteria from page 1 of the survey).

Those subregional priorities that were already included in the top six regional priorities (i.e. Kalbarri National Park iconic skywalk) were not included given their inclusion at question 4.

Going forward it will be important for the Mid West Tourism Alliance to determine a method for monitoring existing identified development options and incorporating new initiatives, and their associated priority level. Development options will naturally move in their importance to business and community whilst new opportunities become apparent – as such a 'live' prioritisation and monitoring process may be appropriate to accommodate this evolution.

The public was asked to indicate how important they believed each option was in the context of addressing the criteria. Again a matrix rating scale was employed: 'unsure' – 1, 'low' – 2, 'medium' – 3, 'high' – 4 and 'very high' – 5.

37 responses were received with the scores weighted and averaged for each priority (Table 3). The top five options were:

- Upgrade the mobile network at key sites and introduce free wifi at select locations
- Improve way finding across the region (i.e. signage, phone apps, touring maps etc)
- Deliver region wide training in service, quality, tourism value and visitor safety
- Develop iconic event(s) promoting the uniqueness of the region
- Develop Recreational Vehicle (RV) parking and visitor amenities in towns

The least supported were

- Develop a number of lookouts and safe viewing sites across the Murchison for extreme weather events
- Develop a leisure focussed high end resort in Dongara - Port Denison to attract the high yield visitor market

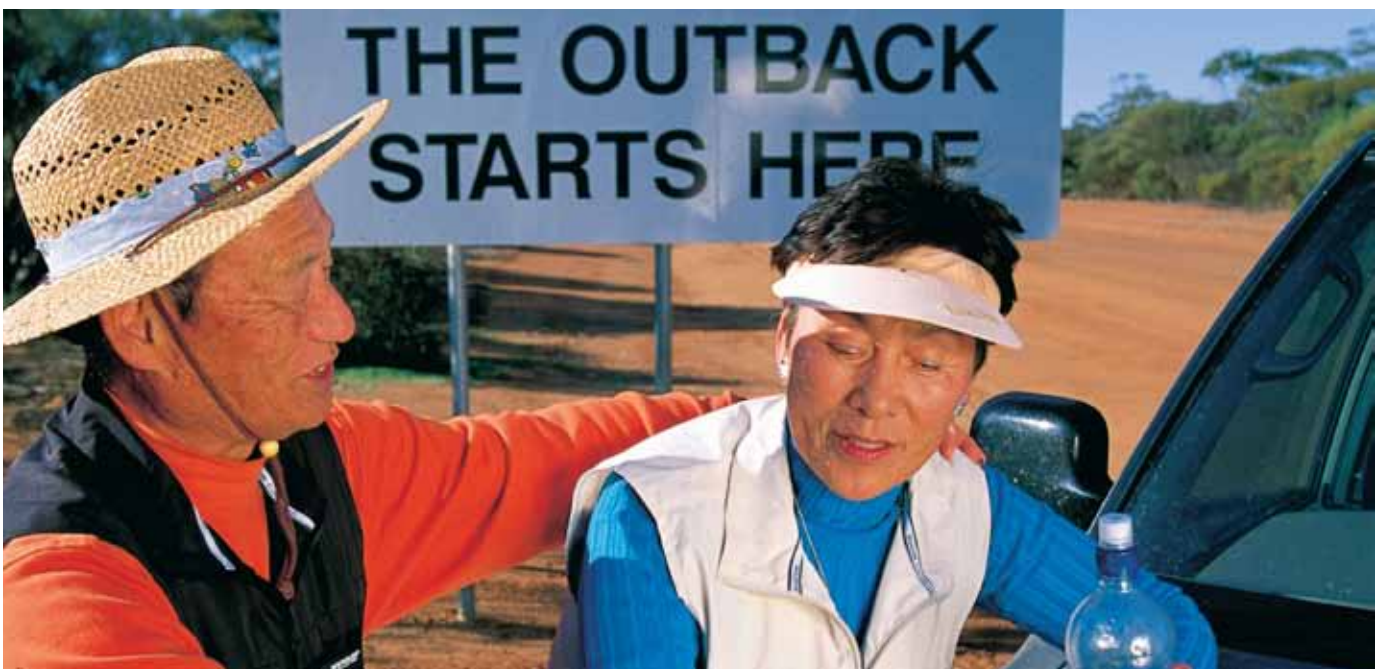


Table 3: Suggested Development Options

	Average rating
Upgrade the mobile network at key sites and introduce free wifi at select locations	4.27
Improve way finding across the region (i.e. signage, phone apps, touring maps etc)	4.16
Deliver region wide training in service, quality, tourism value and visitor safety	4.16
Develop iconic event(s) promoting the uniqueness of the region and encouraging visitors to stay longer	3.95
Develop Recreational Vehicle (RV) parking and visitor amenities in towns to encourage this ever increasing market to stay longer and spend in local economies	3.92
Package holidays across the region to encourage dispersal and visitors to stay longer	3.84
Develop Aboriginal tourism opportunities to provide a range of unique cultural experiences	3.81
Develop interpretive tourism in relation to astronomy and the SKA	3.70
Extend the wildflower self drive trail along the Wildflower Way and Midlands Road creating a loop	3.70
Seek RV friendly town accreditation with the Campervan and Motorhome Club of Australia to capture a greater share of the market	3.68
Develop new (or enhance existing) bike, walk, horse trails at popular sites (i.e. old railway line Yuna - Moresby Ranges, Chapman / Greenough River, Meanarra Hill, Depot Hill, The Granites, Errabiddy Bluff, Peace Gorge) increasing experiences on offer	3.68
Develop tours and facilities to support cruise ship tourism	3.64
Develop a number of half and full day self drive routes with Arbelt interactive installations across the North Midlands, rest and overnight areas, signage, interpretation, eco amenities and lookouts	3.59
Develop a number of eco campgrounds near natural attractions in the North Midlands to improve the range of camping facilities	3.57
Support cultural development in Geraldton (i.e. West End precinct, farmers markets, arts and spaces, regional foods in local venues, heritage interpretation)	3.54
Expand the WA Museum with 3D interpretation of the HMAS Sydney / Kormoran story	3.47
Refurbish select heritage buildings in Murchison towns for tourism use (accommodation, tours etc)	3.46
Develop high quality cabins / chalets in Shire owned caravan parks (Murchison & North Midlands) increasing the range and quality of accommodation	3.43
Support Murchison pastoral properties to develop tourism infrastructure providing visitors with the quintessential outback experience	3.38
Create geo cache trails in towns near unique sites (real world 'treasure' hunting using GPS points and smart devices) targeting the global market of ~ 6 million geo cachers.	3.35
Provide headworks and pre approvals as an incentive to develop a multipurpose world class events facility in Geraldton to attract the high value 'conference' market	3.35
Develop public amenities at the Moresby range, increasing the variety of nature based tourism experiences	3.28
Continue to progress the Port Denison Foreshore master plan with amenities and facilities to develop a character precinct and capture the tourism market	3.19
Develop the old railway marshalling yards adjacent to the new Batavia Coast Marina into a mix of hospitality / community / retail facilities (Batavia Coast Marina Stage 2)	3.17
Develop 'tourism' prospecting reserves in the Murchison	3.00
Develop a number of lookouts and safe viewing sites across the Murchison for extreme weather events	3.00

TOP 5 OPTIONS BY SUBREGION

Batavia (n = 22):

- Deliver region wide training in service, quality, tourism value and visitor safety (4.6)
- Upgrade the mobile network at key sites and introduce free wifi at select locations (4.5)
- Improve way finding across the region (i.e. signage, phone apps, touring maps etc) (4.4)
- Extend the wildflower self drive trail along the Wildflower Way and Midlands Road creating a loop (4.2)
- Develop tours and facilities to support cruise ship tourism (4.2)

Although listed as a subregional priority for Batavia Coast in the strategy, *development of a conference facility* is ranked in the bottom percentile by respondents to the survey. Greater importance was availed to iconic event development, aboriginal tourism opportunities, packaging of holidays, RV parking in towns, Moresby range recreation area and the Museum redevelopment (see appendix A for all rankings). It may be appropriate to revisit the subregional priorities in future action plans.

Murchison (n = 9):

- Improve way finding across the region (i.e. signage, phone apps, touring maps etc) (4.7)
- Upgrade the mobile network at key sites and introduce free wifi at select locations (4.4)
- high quality cabins / chalets in Shire owned caravan parks (Murchison & North Midlands) (4.4)
- develop Aboriginal tourism opportunities to provide a range of unique cultural experiences (4.3)
- develop interpretive tourism in relation to astronomy and the SKA (4.3)

The development of 'tourism' prospecting reserves (3.3) and safe viewing sites across the Murchison for extreme weather events (3.4) ranked in the bottom percentile of the options presented. This may indicate that the suggested top 5 subregional priorities for the Murchison (pg 54 of the strategy) may not be fitting with community desires. This is further reinforced by particular comments from question 9 i.e.

- *those that are mad keen about prospecting are probably not going to want to prospect in a reserve they know 1,000s of others have looked over...*
- *If its flash flooding how on earth are you going to get into the Murchison? There might be a scenic look out but the road is probably mud. Huge public liability to consider and most flash events happen in summer, when it's about 50+ degrees.*

It would be appropriate for the Mid West Tourism Alliance to consider these results in future activities.

North Midlands (n =5):

- Upgrade the mobile network at key sites and introduce free wifi at select locations (4.8)
- Develop iconic event(s) promoting the uniqueness of the region (4.4)
- RV parking and visitor amenities in towns (4.4)
- Package holidays across the region to encourage dispersal and visitors to stay longer (4.4)
- Improve way finding across the region (i.e. signage, phone apps, touring maps etc) (4.2)

Again the rankings of options indicated that the subregional priorities suggested in the strategy for the North Midlands (pg 56) may not necessarily fit with community desires however the sample size was also very small and needs to be taken into consideration. Survey results and strategy recommendations would be best considered on balance if initiatives are progressed by stakeholders.

NEW IDEAS

Feedback from the written submissions (qu 7, 8 and 9) indicated a range of other development options for consideration including:

- Continued development of Monsignor Hawes heritage trail..and the possibility of a 'Camino' type experience
- Sports events
- A complete shopping experience (fashion, culture, food and art) like the newly opened Emporium in Melbourne (Batavia Coast Marina Stage 2 area).
- A major "regional attraction" which goes beyond the ideas of individual councils...a very high end, outback Aboriginal retreat in the desert.
- Annual wildflower art tour linking aboriginal art centres/galleries/studios through the region.
- The need for a regional tourism facilitator.
- A collaborative process, for current providers of tourism accommodation in the region's towns, to be assisted in identifying design possibilities for upgrading current accommodation facilities to a modern accepted standard, while at the same time, enhancing the creative character of their town or enhancing the local pathway themes (eg design and colours which pick up on wildflower pathway, or geo pathway etc) which could be incorporated into the upgrade. That these accommodation businesses then be assisted to access funding for the upgrades to take place.....It will take too long to build the usual investment via tourism market forces, unless some significant intervention incentives are given for accommodation upgrades.
- Revamp and revitalization of the Gascoyne Murchison Outback Pathways project
- Recreational fishing, George Grey interpretative area Kalbarri. Geraldine Mine, plus pathways for Geraldine Mines and Galena. Water Park for Kalbarri.
- Main roads that link regions and towns, road stopping bays and rest areas
- Utilise the Fishing boat Harbour in Geraldton and develop either a cafe or restaurant that is on the waters edge. Day fishing trips but not necessarily to the Abrolhos Islands. Ensure that the Greenough Hamlet and Oakabella Homestead and Allanooka are upgraded and better advertised
- CoGG and Business operators need to be included, involved or engaged to work with Cruise Ship operators and companies long before they arrive on our doorstep so that our sites and events can be included in Tour/Cruise package as all Cruises operate this way ie predetermined and identified activities and costs etc.
- More interaction between towns on tourist information sharing, ie. all small towns to share information brochures so they can tell the tourists about the other great places in their area to see and do.
- Fish Aggregating Devices out of Kalbarri along with artificial reefs
- Rebrand Geraldton and the Midwest as its own entity.
- Reinvigorate existing initiatives - Gascoyne Murchison Outback Pathways / Q- Fest.

Various concerns were outlined in written responses throughout questions 7, 8 and 9 including

- The need to provide coordination to implement and for key agencies to work together.
- The need for funding and resources.
- A need for ongoing commitment by key stakeholders to work together.
- The issue of competitive neutrality, i.e. supporting individual businesses.
- The need for incentives or assistance for local businesses.
- A perceived coastal centric focus.
- Suggested development options already existing or in some form of development.

- Need for a major regional attraction.
- Lack of focus on regional marketing.
- increasing rubbish throughout the Murchison and need for a new model to manage.
- recent high increase of annual Pastoral Tourism Permit rates may act as a disincentive to start up station stay businesses.
- Ability of the strategy to make any difference.
- free camping and impact on struggling hotels and motels.

A number of positive remarks were also noted:

- *I thought the document read very well and was very realistic and practical. It was great to see each area considered on it's own merits as well as a strategic Mid West approach.*
- *Some great work in here, look forward to seeing how the final strategy and its implementation unfolds.*

The varied responses across three distinct sub regions highlights the difficulties of considering all in an overarching strategy.

ROLE IN DELIVERING PRIORITIES OR DEVELOPMENT OPTIONS

The Community was asked whether they felt they had a role to play in delivering any of the suggested priorities or development options. The responses were largely positive. A common theme was the important role Local Government plays in delivering many of the options – seen as a positive for some but negative for others i.e.

- *Local Government has a key role to play particularly if tourism is promoted on a regional basis - rather than on a Shire by Shire basis.*
- *Local Government could apply for funding to invest into some of these key areas and priorities, as well as parking facilities, website, signage, tourist maps, walk/bike/drive trails. Management and maintenance will be a large responsibility for local governments so consideration needs to be given in the Tourism sector for how LG's will continue to manage increase(d) visitor pressure and facilities.*
- *The shires seem to be responsible for doing and funding everything.*
- *There is a role for Local Government work together - under a totally different paradigm than exists today.*

The need for partnerships, engagement and cooperation at all levels was reinforced by several respondents. Not unexpected many of the comments raised the issue of funding to support on ground actions and to 'enable local people and business get on with business development in the tourism space'.



APPENDIX

Average Ratings for Development Options based on subregion

1. Batavia Coast responses

	Rating
Deliver region wide training in service, quality, tourism value and visitor safety	4.6
Upgrade the mobile network at key sites and introduce free wifi at select locations	4.5
Improve way finding across the region (i.e. signage, phone apps, touring maps etc)	4.4
Extend the wildflower self drive trail along the Wildflower Way and Midlands Road creating a loop	4.2
Develop tours and facilities to support cruise ship tourism	4.2
Develop iconic event(s) promoting the uniqueness of the region and encouraging visitors to stay longer	4.2
Develop Aboriginal tourism opportunities to provide a range of unique cultural experiences	4.1
Develop Recreational Vehicle (RV) parking and visitor amenities in towns to encourage this ever increasing market to stay longer and spend in local economies	4.1
Develop a number of half and full day self drive routes with Arbelt interactive installations across the North Midlands, rest and overnight areas, signage, interpretation, eco amenities and lookouts	4.1
Package holidays across the region to encourage dispersal and visitors to stay longer	4.0
Seek RV friendly town accreditation with the Campervan and Motorhome Club of Australia to capture a greater share of the market	4.0
Develop interpretive tourism in relation to astronomy and the SKA	4.0
Develop a number of eco campgrounds near natural attractions in the North Midlands to improve the range of camping facilities	4.0
Expand the WA Museum with 3D interpretation of the HMAS Sydney / Kormoran story	4.0
Develop public amenities at the Moresby range, increasing the variety of nature based tourism experiences	3.9
Develop new (or enhance existing) bike, walk, horse trails at popular sites (i.e old railway line Yuna - Moresby Ranges, Chapman / Greenough River, Meanarra Hill, Depot Hill, The Granites, Errabiddy Bluff, Peace Gorge) increasing experiences on offer	3.9
Refurbish select heritage buildings in Murchison towns for tourism use (accommodation, tours etc)	3.9
Support cultural development in Geraldton (i.e. West End precinct, farmers markets, arts and spaces, regional foods in local venues, heritage interpretation)	3.8
Create geo cache trails in towns near unique sites (real world 'treasure' hunting using GPS points and smart devices) targeting the global market of ~ 6 million geo cachers.	3.7
Support Murchison pastoral properties to develop tourism infrastructure providing visitors with the quintessential outback experience	3.7
Develop the old railway marshalling yards adjacent to the new Batavia Coast Marina into a mix of hospitality / community / retail facilities (Batavia Coast Marina Stage 2)	3.5
Continue to progress the Port Denison Foreshore master plan with amenities and facilities to develop a character precinct and capture the tourism market	3.5
Provide headworks and pre approvals as an incentive to develop a multi purpose world class events facility in Geraldton to attract the high value 'conference' market	3.5
Develop a number of lookouts and safe viewing sites across the Murchison for extreme weather events	3.4
Develop high quality cabins / chalets in Shire owned caravan parks (Murchison & North Midlands) increasing the range and quality of accommodation	3.3
Develop a leisure focussed high end resort in Dongara - Port Denison to attract the high yield visitor market	3.1
Develop 'tourism' prospecting reserves in the Murchison	2.9

2. North Midlands responses

	Rating
Upgrade the mobile network at key sites and introduce free wifi at select locations	4.8
Develop iconic event(s) promoting the uniqueness of the region and encouraging visitors to stay longer	4.4
Develop Recreational Vehicle (RV) parking and visitor amenities in towns to encourage this ever increasing market to stay longer and spend in local economies	4.4
Package holidays across the region to encourage dispersal and visitors to stay longer	4.4
Improve way finding across the region (i.e. signage, phone apps, touring maps etc)	4.2
Develop tours and facilities to support cruise ship tourism	4.2
Seek RV friendly town accreditation with the Campervan and Motorhome Club of Australia to capture a greater share of the market	4.2
Develop a number of eco campgrounds near natural attractions in the North Midlands to improve the range of camping facilities	4.2
Support cultural development in Geraldton (i.e. West End precinct, farmers markets, arts and spaces, regional foods in local venues, heritage interpretation)	4.2
Deliver region wide training in service, quality, tourism value and visitor safety	4.0
Extend the wildflower self drive trail along the Wildflower Way and Midlands Road creating a loop	3.8
Develop a number of half and full day self drive routes with Arbelt interactive installations across the North Midlands, rest and overnight areas, signage, interpretation, eco amenities and lookouts	3.8
Develop new (or enhance existing) bike, walk, horse trails at popular sites (i.e old railway line Yuna - Moresby Ranges, Chapman / Greenough River, Meanarra Hill, Depot Hill, The Granites, Errabiddy Bluff, Peace Gorge) increasing experiences on offer	3.8
Develop high quality cabins / chalets in Shire owned caravan parks (Murchison & North Midlands) increasing the range and quality of accommodation	3.8
Develop a leisure focussed high end resort in Dongara - Port Denison to attract the high yield visitor market	3.8
Develop Aboriginal tourism opportunities to provide a range of unique cultural experiences	3.6
Develop interpretive tourism in relation to astronomy and the SKA	3.6
Create geo cache trails in towns near unique sites (real world 'treasure' hunting using GPS points and smart devices) targeting the global market of ~ 6 million geo cachers.	3.6
Provide headworks and pre approvals as an incentive to develop a multi purpose world class events facility in Geraldton to attract the high value 'conference' market	3.6
Continue to progress the Port Denison Foreshore master plan with amenities and facilities to develop a character precinct and capture the tourism market	3.5
Refurbish select heritage buildings in Murchison towns for tourism use (accommodation, tours etc)	3.4
Develop 'tourism' prospecting reserves in the Murchison	3.3
Support Murchison pastoral properties to develop tourism infrastructure providing visitors with the quintessential outback experience	3.2
Develop a number of lookouts and safe viewing sites across the Murchison for extreme weather events	3.2
Expand the WA Museum with 3D interpretation of the HMAS Sydney / Kormoran story	3.0
Develop public amenities at the Moresby range, increasing the variety of nature based tourism experiences	3.0
Develop the old railway marshalling yards adjacent to the new Batavia Coast Marina into a mix of hospitality / community / retail facilities (Batavia Coast Marina Stage 2)	2.8

3. Murchison responses

	Rating
Improve way finding across the region (i.e. signage, phone apps, touring maps etc)	4.7
Upgrade the mobile network at key sites and introduce free wifi at select locations	4.4
Develop high quality cabins / chalets in Shire owned caravan parks (Murchison & North Midlands) increasing the range and quality of accommodation	4.4
Develop Aboriginal tourism opportunities to provide a range of unique cultural experiences	4.3
Develop interpretive tourism in relation to astronomy and the SKA	4.3
Develop iconic event(s) promoting the uniqueness of the region and encouraging visitors to stay longer	4.2
Develop Recreational Vehicle (RV) parking and visitor amenities in towns to encourage this ever increasing market to stay longer and spend in local economies	4.2
Deliver region wide training in service, quality, tourism value and visitor safety	4.2
Package holidays across the region to encourage dispersal and visitors to stay longer	4.1
Develop new (or enhance existing) bike, walk, horse trails at popular sites (i.e old railway line Yuna - Moresby Ranges, Chapman / Greenough River, Meanarra Hill, Depot Hill, The Granites, Errabiddy Bluff, Peace Gorge) increasing experiences on offer	4.1
Support Murchison pastoral properties to develop tourism infrastructure providing visitors with the quintessential outback experience	4.1
Refurbish select heritage buildings in Murchison towns for tourism use (accommodation, tours etc)	3.9
Seek RV friendly town accreditation with the Campervan and Motorhome Club of Australia to capture a greater share of the market	3.8
Provide headworks and pre approvals as an incentive to develop a multi purpose world class events facility in Geraldton to attract the high value 'conference' market	3.8
Extend the wildflower self drive trail along the Wildflower Way and Midlands Road creating a loop	3.7
Develop a number of half and full day self drive routes with Arbelt interactive installations across the North Midlands, rest and overnight areas, signage, interpretation, eco amenities and lookouts	3.7
Create geo cache trails in towns near unique sites (real world 'treasure' hunting using GPS points and smart devices) targeting the global market of ~ 6 million geo cachers.	3.6
Develop a number of eco campgrounds near natural attractions in the North Midlands to improve the range of camping facilities	3.4
Support cultural development in Geraldton (i.e. West End precinct, farmers markets, arts and spaces, regional foods in local venues, heritage interpretation)	3.4
Develop a number of lookouts and safe viewing sites across the Murchison for extreme weather events	3.4
Continue to progress the Port Denison Foreshore master plan with amenities and facilities to develop a character precinct and capture the tourism market	3.3
Develop 'tourism' prospecting reserves in the Murchison	3.3
Expand the WA Museum with 3D interpretation of the HMAS Sydney / Kormoran story	3.2
Develop the old railway marshalling yards adjacent to the new Batavia Coast Marina into a mix of hospitality / community / retail facilities (Batavia Coast Marina Stage 2)	3.2
Develop a leisure focussed high end resort in Dongara - Port Denison to attract the high yield visitor market	3.1
Develop tours and facilities to support cruise ship tourism	3.0
Develop public amenities at the Moresby range, increasing the variety of nature based tourism experiences	3.0

