DESTINATION
MANAGEMENT PLAN

GERALDTON

TAKE A FRESH LOOK

FOREWORD

We want people around the world to experience what we get to day in, day out – the uniqueness that is Geraldton and the Midwest.

The Destination Management Plan is all about making Geraldton a destination of choice and putting in place a strategy and approach for promoting tourism in our region.

We want to create linkages to our regional neighbours with our goal of putting the Midwest on the map!

It has been a coordinated approach that has been industry led by our Tourism Industry Leadership Group with people from a diverse range of businesses coming together to collaborate on how we can best promote our own backyards.

So what does this mean for Geraldton? A number of opportunities will arise from the Plan that will essentially be an ongoing delivery of various tourism initiatives and a clear sense of direction moving forward.

What comes with opportunities comes challenges and this is all about identifying those challenges to find solutions to create change and make a real impact.

This document was born from the Growing Greater Geraldton Growth Plan, an outcome from Progress Midwest.

We needed a new way of thinking and that is exactly what Progress Midwest is fostering with their cluster approach, firstly with the Growth Plan and now with the Destination Management Plan.

Outcomes from this Plan include defining our region, understanding our existing and future markets, defining a strong brand for marketing purposes and developing a destination management structure.

I would like to congratulate Progress Midwest on this unique collaboration.

This Plan is just the beginning of a strong alliance with our regional network and working our way out to promote the whole region. We want a wider approach to attracting people to everything the Midwest has to offer.

Let’s bring more people to our part of the world!

City of Greater Geraldton Mayor Shane Van Styn

PROGRESS MIDWEST
Growing Greater Geraldton

City of Greater Geraldton
a vibrant future

EXECUTIVE SUMMARY

Purpose

This Plan provides an integrated destination approach for tourism in greater Geraldton and its linkages to surrounding regions, with the overall goal of growing the greater Geraldton visitor economy.

It is the product of the unique, collaborative industry cluster approach arising from the Growing Greater Geraldton plan launched in 2016, the hallmark of which is Progress Midwest – an independently-incorporated body that brings together the support of all levels of Government with industry.

The Destination

The “destination” that this Plan seeks to grow is the region within a daytrip of Geraldton. Geraldton will be the centre of a “hub and spoke” structure, being a starting point or home base for exploring the region, or as a stopover in a longer journey.

Tourism Goals

This plan proposes four tourism goals for 2020-21:

- Grow the greater Geraldton visitor economy to $197 million in 2020-21 (that is, 10% growth per year)
- Deliver a great visitor experience
- Build industry leadership, collaboration and capability
- Develop and communicate ‘Brand Geraldton’: a clear tourism identity

Challenges & Opportunities

As many in the local industry have recognised, there is currently a real window of opportunity for a coordinated approach to growing the greater Geraldton tourism economy:

- The industry cluster approach as part of the Greater Geraldton Growth Strategy
- The creation of Progress Midwest to drive this strategy, and more recently the formation of the Tourism Industry Leadership Group
- A clear sense of momentum in the ongoing delivery of tourism-related initiatives ranging from industry programs to marketing; and the forthcoming opening of The Gerald Apartment Hotel as a new accommodation and conference venue.
- The commitment by the new State Government to an investment of $425 million to destination marketing and events over the next five years
- The 2018 launch of direct flights from London to Perth, and the knock-on opportunities that provides to regional tourism hubs such as Geraldton.
- The impact on WA tourism from the forthcoming opening of the new Perth stadium and a range of new Perth hotels.

For a variety of reasons, tourism in greater Geraldton (and the Coral Coast region) has been flat for some years – which suggests that a new approach to destination management and marketing is required for significant growth is to be achieved

Part of that new approach is the need for one or more ‘catalyst’ projects, to build Geraldton’s position as a destination, and to trigger new and higher visitation – including from new markets and segments not currently served

Greater Geraldton is not currently perceived as a destination in its own right – its main strengths are not seen as unique or appealing, and it is currently positioned as a stopover.

The regional funding environment has changed significantly in recent times, meaning that how tourism projects and marketing are funded needs creative and innovative solutions. That said, investment in tourism has a demonstrated ‘multiplier effect’ of between x1.3 and x1.6 – meaning that the investment case can be made to Government regarding the impact on the regional economy and regional jobs.

Like all local and regional tourism destinations, greater Geraldton faces intense and well-resourced competition from many directions – within Western Australia, across Australia, and increasingly from highly competitive international destinations like Bali. With no prospect of being able to match the brand and marketing investment of these competitors, to be successful the industry in greater Geraldton must look to “working smarter” and collaborating on a small number of the highest-impact initiatives.

There is currently substantial available aviation and accommodation capacity into Geraldton, suggesting that at least some short- to medium-term growth in the visitor economy may be possible without major strategic investment. That said, significant growth into the longer term will require strategic investment across the board in attractions and experiences, access, infrastructure and industry capability.

The Destination Strategy & Plan

How will 10% growth in the visitor economy each year through to 2020 be achieved? This strategy proposes a five-fold approach:

- An industry-led, partnership-style collaboration between industry, Government and the community
- A clear and sustainable commitment to leadership, resourcing and industry development
- A narrow focus on a core market, and selected strategic niches
- Continuing effort to develop the destination over time
- Targeted brand and marketing activity to stimulate demand

The plan details seven strategy ‘pillars’; each pillar has a set of project initiatives which will be implemented by Progress Midwest in collaboration with the Tourism Industry Leadership Group and a range of government and industry partners.

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Three related documents link directly to this plan, and are available separately:

Greater Geraldton Destination Management Plan: Detailed Situation Analysis

Greater Geraldton Destination Management Plan: Project Management Tool (Spreadsheet)

Greater Geraldton Destination Management Plan: Tourism Growth Model (Spreadsheet)

Confidentiality

The information provided in or in relation to this document should be treated as confidential and in accordance with the terms set out in the memorandum of understanding between Market Creations and the City of Greater Geraldton on behalf of Progress Midwest.

Disclaimer

No representation or warranty, expressed or implied, is made by Market Creations, its employees, advisers or agents as to the accuracy, reliability or completeness of the information contained in this report. Market Creations shall not have any liability whatsoever to any organisation or any other person, directly or indirectly, arising out of the content of this document being provided to or used by any organisation for any purpose other than that for which this report has been prepared.

In the course of our preparation of this report, estimates and projections have been prepared on the basis of assumptions and methodology which have been described in the report. It is possible that the assumptions underlying the estimates and projections may change. Nevertheless, the professional judgement of Market Creations has been applied in making these assumptions, such that they constitute an understandable basis for estimates and projections. Beyond this, to the extent that the assumptions do not materialise, the estimates and projections of achievable results may vary.

1. Background & Purpose

The purpose of this Plan is to provide an integrated destination approach for tourism in greater Geraldton and its linkages to surrounding regions, with the overall goal of growing the visitor economy.

It is the product of the unique, collaborative industry cluster approach arising from the Growing Greater Geraldton plan launched in 2016, the hallmark of which is Progress Midwest – an independently incorporated body that brings together the support of all levels of Government with industry.

There is a strong sense of building momentum in Geraldton tourism at present, with a range of growth-focused activity completed and underway:

- Mid West Regional Blueprint (2016)
- Mid West Tourism Update Workshop (July 2016)
- Perceptions of Greater Geraldton Research (July 2016)
- "Take a Fresh Look" Cluster Jam (September 2016)
- "Know Our Product" Event (October 2016)
- China Ready Training (December 2016)

This momentum has culminated in the recent (May 2017) formation of the industry-led Tourism Industry Leadership Group, with the intended outcome of increasing the level of tourism visitation and spending throughout the region. Through Progress Midwest, the Group has made clear its desire for a focused, actionable plan that prioritises projects and initiatives that will have the biggest impact on the visitor economy.

Importantly, this Plan will provide the basis for engaging with all stakeholders to identify and secure funding and resources to support growth of tourism in Geraldton and beyond into the long term.

Progress Midwest, through project sponsor the City of Greater Geraldton, specified the following objectives for this project:

- Defining the destination
- Understanding our existing and future markets (customers and visitors)
- Understanding our offering (existing and potential) of key products and experiences, for grouping and potentially packaging kindred products and experiences
- Identifying narratives for grouping tourism products and experiences
- Identifying any 'gaps' or potential tourism opportunities
- Identifying any 'challenges'
- Adapting or creating a strong community based vision for the future
- Defining the current brand or brands and marketing processes and future fit
- Developing a destination management structure with a clear communication and engagement process
- Strategic recommendations summarised for future short term and long-term tourism growth

2. Defining the Destination

About Geraldton

Geraldton is located 419 kilometres north of Perth, a 4-hour drive or 45-minute direct flight from Perth. It is Western Australia's largest city outside of the Perth metropolitan growth area, and is not only a significant centre in its own right, but is also is a hub serving the Mid West region and serving North-South self-drive tourism.

Geraldton has a rich cultural and historical heritage to explore, including the magnificent HMAS Sydney II memorial, which commemorates 645 crew members lost during World War II, the St Francis Xavier Cathedral built by famed architect Monsignor Hawes, and the ancient Yamaji culture. In the Western Australian Museum – Geraldton, visitors can learn about the tragic stories revealed by relics of shipwrecks, including the famous Batavia mutiny story.

From July to October, Geraldton becomes the gateway to wildflower country, where visitors can see everlastings and hundreds of other native varieties stretch as far as the eye can see.

Geraldton also offers a variety of water sports and activities, including surfing, kite surfing, windsurfing, diving, snorkelling, boating and fishing. Just 60 kilometres from the shoreline, are the coral-fringed Abrolhos Islands where you can join a fishing, diving or snorkelling charter, or take it all in from the air on a scenic flight.

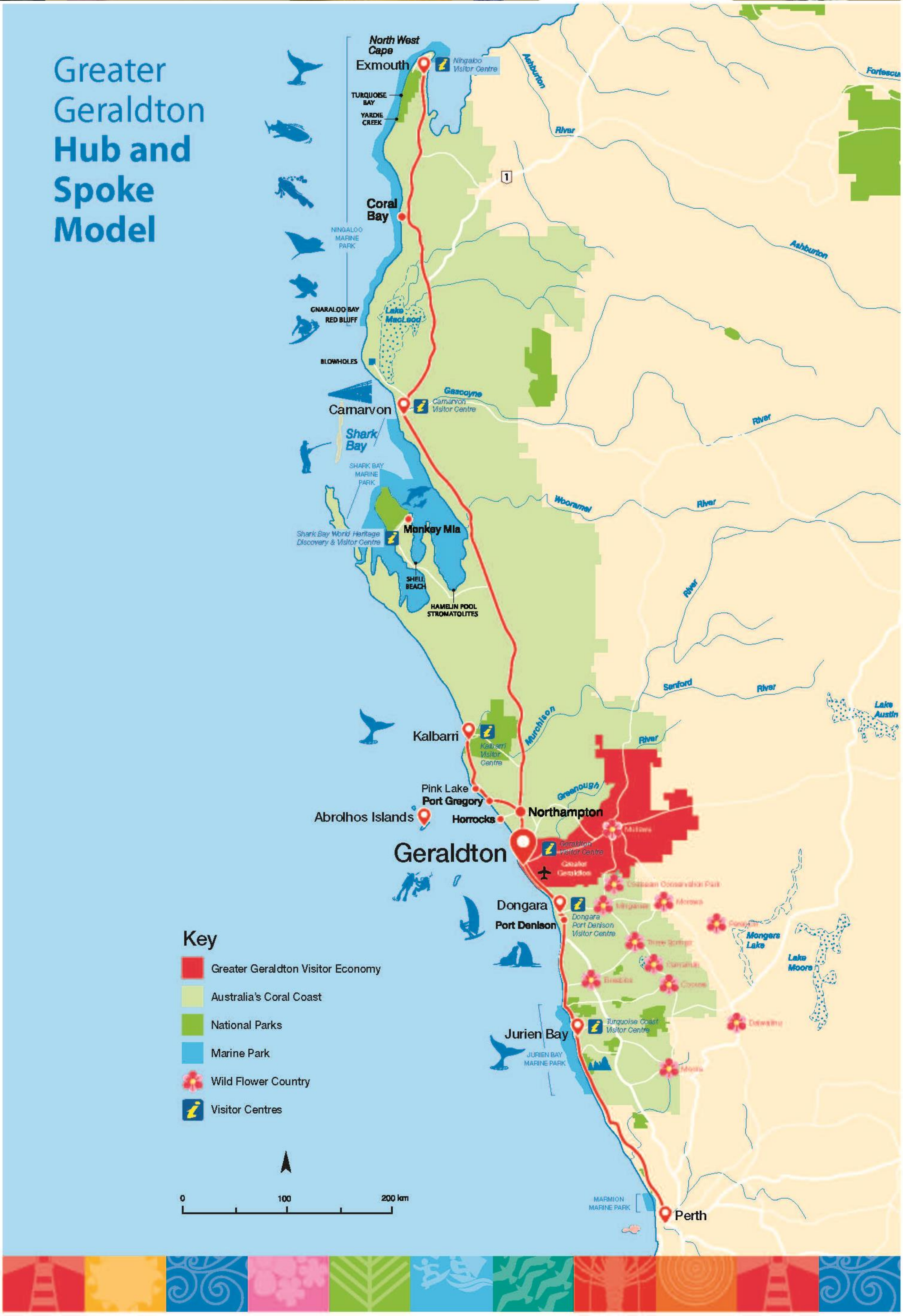
Defining the Destination

The obvious starting point for destination planning is to define the destination – but this is not as straightforward as it first might seem:

- From a consumer perspective, we know visitors don't think or behave in line with the boundaries of Government or tourism organisations
- As is discussed later in the Plan, Geraldton is not yet established as a destination in its own right; at the same time, there are a number of iconic, world-class attractions and experienced in surrounding regions
- From a practical standpoint, bigger is rarely better when it comes to the scope of a destination – there are important trade-offs to make between coverage, ability to create a focused strategy and the resources available
- From a broader standpoint, the Plan must address its underlying purpose of growing the visitor economy.

These and other issues were discussed at the initial stakeholder workshop held in Geraldton on May 24, 2017. After discussion, and in the context of the overall goal being to grow the visitor economy of the greater Geraldton area, the group agreed to the following definition (summarised in the graphic overleaf):

- The destination is **the region within a daytrip of Geraldton**
- **Geraldton will be the centre of a "hub and spoke" structure**, being a starting point or home base for exploring the region, or as a stopover in a longer journey


Greater Geraldton Hub and Spoke Model
North West Cape
Exmouth
Ningaloo Visitor Centre
TURQUOISE BAY
YARDIE CREEK
Coral Bay
NINGALOO MARINE PARK
GNARALOO BAY
RED BLUFF
Lake MacLeod
BLOWHOLES
Carnarvon
Carnarvon Visitor Centre
Gascoyne
Shark Bay
SHARK BAY MARINE PARK
Monkey Mia
Shark Bay World Heritage Discovery & Visitor Centre
SHELL BEACH
HAMELIN POOL STROMATOLITES
Ashburton
River
Wooramel
Sanford
Murchison
Greenough
Lake Austin
Kalbarri
Kalbarri Visitor Centre
Pink Lake
Port Gregory
Northampton
Abrolhos Islands
Horrocks
Geraldton
Dongara
Port Denison
Dongara Port Denison Visitor Centre
Mongers Lake
Lake Moore
Jurien Bay
Turquoise Coast Visitor Centre
JURIEN BAY MARINE PARK
MARMION MARINE PARK
Perth
Key
Greater Geraldton Visitor Economy
Australia's Coral Coast
National Parks
Marine Park
Wild Flower Country
Visitor Centres
0
100
200 km

Hub and Spoke Structure

The hub and spoke structure fits well with the 2016 research that highlighted Geraldton's strengths in providing good-value accommodation and a range of services (such as health and motoring-related services).

It is also of particular importance to operators and Government agencies in surrounding areas: Geraldton can provide facilities and services (particularly accommodation) less available in neighbouring areas, allowing other destinations in the area to increase their potential visitor base, and not be reliant only on the accommodation available locally. The 'spokes' of the hub and spoke model would include (but not be limited to):

- All of the Australia's Coral Coast tourism region, and part of the Australia's Golden Outback tourism region
- The local government areas of Dandaragan, Coorow, Carnamah, Three Springs, Perenjori, Mingenew, Morawa, Irwin, Greater Geraldton (including Mullewa), Chapman Valley, Northampton, Murchison, Shark Bay and Carnarvon
- Attractions in towns within the above regions, including (but not limited to) Dongara, Kalbarri, Monkey Mia, the towns of Wildflower Country (to the South East of Geraldton), the Abrolhos Islands and Port Gregory.

How those responsible for tourism in the above areas might partner with Progress Midwest to grow tourism for the broader region is discussed later in this plan.

3. The Planning Context

In preparing a destination strategy for greater Geraldton, there is a substantial established planning context – both of other plans that this one seeks to align with, and also past plans from which lessons learned can be gleaned. The following plans have been reviewed and where relevant incorporated into this document:

Planning Alignment

- Growth Greater Geraldton: A Growth Plan (2017)
- Geraldton City Centre Revitalisation Plan (2017)
- Mid West Regional Blueprint, Mid West Development Commission (2015)
- Mid West Investment Plan, Mid West Development Commission (2011)
- Mid West Tourism Development Strategy (2014)
- State Government Strategy for Tourism in Western Australia 2020 (2017)

Past Plans

- Australia's Coral Coast Destination Development Strategy Update (2007)
- Geraldton-Greenough Tourism Strategy (2009)

Primary Stakeholders

In a similar vein, there are a group of existing key stakeholders with overlapping interests and responsibilities for tourism in greater Geraldton. There are many organisations and individuals with a link to tourism in the area, and this plan focuses on those with the most direct and core interests:

- Industry operators (eg attractions, accommodation, transport)
- Progress Midwest (responsible for the Tourism Cluster, and now also the Geraldton Visitor’s Centre, and a Cruise Ship Officer); with the Tourism Industry Leadership Group (a voluntary industry-led group under Progress Midwest)
- City of Greater Geraldton (including Geraldton Airport and a city events function)
- Mid West Development Commission
- Australia’s Coral Coast, Australia’s Golden Outback and Tourism WA
- Mid West Ports Authority
- Special interest groups (eg Batavia Coast Maritime Heritage Association)

The relationships between these and other stakeholders are discussed in detail later in the Plan.

4. Current Situation

Market Creations has undertaken a detailed situation analysis to support the development of the destination strategy and planning. The key findings of that analysis follow; supporting data, sources and references are summarised in a separate companion report to this Plan.

A. Visitor Economy

A detailed review of the greater Geraldton visitor economy found that:

- Tourism contributed approximately $148m to the greater Geraldton economy in 2015; REMPLAN estimates that every dollar spent on tourism has a multiplier effect of x1.3 to x1.6
- The most valuable visitor group is domestic overnight leisure tourists: 23% of visitors, 72% of spending
- Visitor trips to Geraldton are typically shorter than the WA average, and visitors spend less spend per night
- There are significant seasonality gaps from November to March, which is both a challenge and an opportunity
- There has been no change in Geraldton’s share of regional tourism over time, nor in average takings per night
- The cruise ship passenger segment is making significant contribution, of $7.1m in 2015-16

B. Consumer Perceptions

A detailed study of tourist perceptions (both visitors and non-visitors) was commissioned by LandCorp in 2016 as part of the industry cluster program. The project, which included an asset review and a brand assessment, highlighted a number of key issues from a consumer perspective:

- Geraldton is not yet positioned as a standalone destination in its own right: it is not perceived as unique, and is not appealing as a destination. It is positioned as a stopover, as part of a longer journey to or through the region.
- In the same vein, the ‘triggers’ to make a visit Geraldton, are outside Geraldton
- A huge majority (91%) of leisure visitors are self-drive
- With strengths in accommodation and services, Geraldton has a real opportunity to be a hub for visiting iconic destinations in the region eg Kalbarri, Abrolhos, wildflowers, Shark Bay, southern Coral Coast
- Consumers see a number of potential experience areas that could be leveraged (such as seafood and maritime history), and also a range of barriers to this being achieved (discussed later in detail).

C. Market and Competitors

An assessment of greater Geraldton's market and competitors revealed:

- In the intrastate market, Geraldton faces very strong competition from South West/Margaret River, Broome, the Ningaloo region and Perth.
- At the same time, competition from international alternatives (such as Bali) is intense; more Australian tourists are choosing to holiday overseas than ever before (12% of leisure trips, up from 6% in 2006)
- Geraldton's core market is self-drive, intrastate domestic overnight visitors (72% of spending). The majority (72%) are over 50, and spend 2-3 days in Geraldton.
- Geraldton is not on the radar as a destination for the interstate market.

D. Products and Experiences

Building on the 2016 tourism asset review conducted by TNS, Market Creations conducted an assessment and gap analysis of the key tourism products and experiences in greater Geraldton – with the following findings:

- For the leisure market, there are currently no unique or appealing experiences that are likely to trigger higher visitation or to differentiate Geraldton relative to competitors.
- With its strength in the range and perceived value of accommodation, and the other services available, Geraldton is already well positioned as a starting point or home base for exploring iconic, "bucket list" destinations in the region:
    - Kalbarri
    - Shark Bay & Monkey Mia
    - Wildflower Country
    - Abrolhos Islands
    - Pink Lakes
    - Southern Coral Coast (eg Pinnacles/Cervantes)
- History and heritage has potential for further development, with sufficient product already available to have a critical mass of 'intensity'
- There appears to be significant latent accommodation capacity throughout the year, and particularly in November-March
- Even so, there may potentially be demand for additional self-contained and luxury resort/hotel rooms (though self-contained will likely be served by Airbnb-type properties)
- There a range of future product development opportunities, in particular by leveraging current and potential future private and public investment – for example in Kalbarri, national parks and nature reserves, the impending launch of The Gerald Apartment Hotel, and other possible property developments

E. Access & Infrastructure

A review of greater Geraldton's tourism access and infrastructure found:

- Geraldton is an overwhelmingly self-drive market – and so all aspects of road access and wayfinding are critical
- Air links are dominated by business travel (~80% of passengers) – with around 40% spare capacity year-round, and a January-February lull (like due to summer holidays)
- Air passenger seats have increased over time, but utilisation has decreased over the same period
- Cruise shipping is a real strength (and opportunity) for Geraldton
- The Visitors Centre is also performing strongly, with steady growth in foot traffic
- 'Vibrancy' in town has been consistently identified as an issue, especially for 'after 5pm' dining and nightlife

F. Brand and Marketing

In assessing the current brand and marketing position for tourism in greater Geraldton, Market Creations reviewed the 2016 consumer research and brand assessment, together with an analysis of past marketing activity and best practice marketing models from Tourism Australia and Tourism WA. The assessment found:

- Intrastate market awareness of Geraldton is as expected high, but knowledge is very low – only 1 in 3 past visitors know "a lot", and 92% of non-visitors know "nothing" or "not much"
- After limited past activity, the tourism cluster is driving new-found momentum in marketing – which shows the opportunity a planned Destination Marketing Plan presents
- The 'Geraldton: Take a fresh look' brand presents the best platform, but needs repositioning and a clearer identity, personality and set of supporting stories/narratives
- Visitors overwhelmingly prefer tourism information online – suggesting any future marketing investment should be digital-first
- With a limited budget, and other tourism organisations focused on other journey stages, marketing activity should focus primarily on the 'en route' and 'in market' stages: improving yield, filling the itinerary

G. Industry Perspective

Market Creations’ assessment of the greater Geraldton tourism sector revealed:

- The sector has seen past issues with fragmented leadership and under-funded industry plans, and opportunities for greater participation in Visitors Centre and Australia’s Coral Coast programs
- Past plans suggest Geraldton tourism has been at a strategic crossroads for some time
- Notwithstanding the above, there has been good progress in a number of areas – reflected in Geraldton winning the 2016 Top Tourism Town Award
- The new destination management and marketing structure, together with partnerships with key stakeholders, presents an important opportunity for a collaborative approach and shared investment
- With the newly-formed Tourism Industry Leadership Group addressing past leadership challenges, a central issue now is resourcing over the longer term – for tourism projects, tourism marketing and for “arms and legs” to do the work

5. Key Challenges and Opportunities

Based on the situation analysis and consultation with stakeholders, there a range of key issues and opportunities the destination strategy and planning must address:

- As many in the local industry have recognised, there is currently a real window of opportunity for a coordinated approach to growing the greater Geraldton tourism economy:
  - The industry cluster approach as part of the Greater Geraldton Growth Strategy
  - The creation of Progress Midwest to drive this strategy, and more recently the formation of the Tourism Industry Leadership Group
  - A clear sense of momentum in the ongoing delivery of tourism-related initiatives ranging from industry programs to marketing; and the forthcoming opening of The Gerald Apartment Hotel as a new accommodation and conference venue.
  - The commitment by the new State Government to an investment of $425 million to destination marketing and events over the next five years
  - The 2018 launch of direct flights from London to Perth, and the knock-on opportunities that provides to regional tourism hubs such as Geraldton.
  - The impact on WA tourism from the forthcoming opening of the new Perth stadium and a range of new Perth hotels.
- For a variety of reasons, tourism in greater Geraldton (and the Coral Coast region) has been flat for some years – which suggests that a new approach to destination management and marketing is required for significant growth is to be achieved
- Part of that new approach is the need for one or more 'catalyst' projects, to build Geraldton's position as a destination, and to trigger new and higher visitation – including from new markets and segments not currently served
- Greater Geraldton is not currently perceived as a destination in its own right – its's main strengths are not seen as unique or appealing, and it is currently positioned as a stopover.
- The regional funding environment has changed significantly in recent times, meaning that how tourism projects and marketing are funded needs creative and innovative solutions. That said, investment in tourism has a demonstrated 'multiplier effect' of between x1.3 and x1.6 – meaning that the investment case can be made to Government regarding the impact on the regional economy and regional jobs.
- Like all local and regional tourism destinations, greater Geraldton faces intense and well-resourced competition from many directions – within Western Australia, across Australia, and increasingly from highly competitive international destinations like Bali. With no prospect of being able to match the brand and marketing investment of these competitors, to be successful the industry in greater Geraldton must look to "working smarter" and collaborating on a small number of the highest-impact initiatives.
- There is currently substantial available aviation and accommodation capacity into Geraldton, suggesting that at least some short- to medium-term growth in the visitor economy may be possible without major strategic investment. That said, significant growth into the longer term will require strategic investment across the board in attractions and experiences, access, infrastructure and industry capability.

6. Our Tourism Goals

At the heart of the industry cluster approach that Progress Midwest is facilitating is an aspiration for economic growth. This fits well with tourism growth aspirations for both the Mid West and the State:

- The 2014 Mid West Tourism Development Strategy set a series of long-term goals to attract 1 million overnight visitors by 2050, staying 5,000,000 nights, and generating overnight expenditure of $544m; and 616,000 day-trip visitors generating $67m expenditure also by 2050.
- Tourism WA has set a stretch goal to double the value of tourism in Western Australia – from $6 billion in 2010 (and then $9 billion in 2016) to $12 billion by 2020.

In discussion at the May 2017 tourism stakeholder workshop, there was broad agreement around having similar aspirations for significant growth in the greater Geraldton visitor economy – though at the same time acknowledging that this would require a different approach to tourism, after experiencing at best flat tourism turnover in recent years.

In 2015 Tourism Research Australia estimated that the tourism spend in the greater Geraldton region was $148 million – which represented 1.3% of tourism spending in WA that year. Based on the State and Mid West stretch targets, the visitor economy objective is to generate tourism spending of $197 million in greater Geraldton in 2020-21. This assumes there was little to no growth has been achieved between 2015 and 2017; a 10% increase per year thereafter; and keeping Geraldton's share of WA and national tourism stable. This growth will be achieved through a combination of:

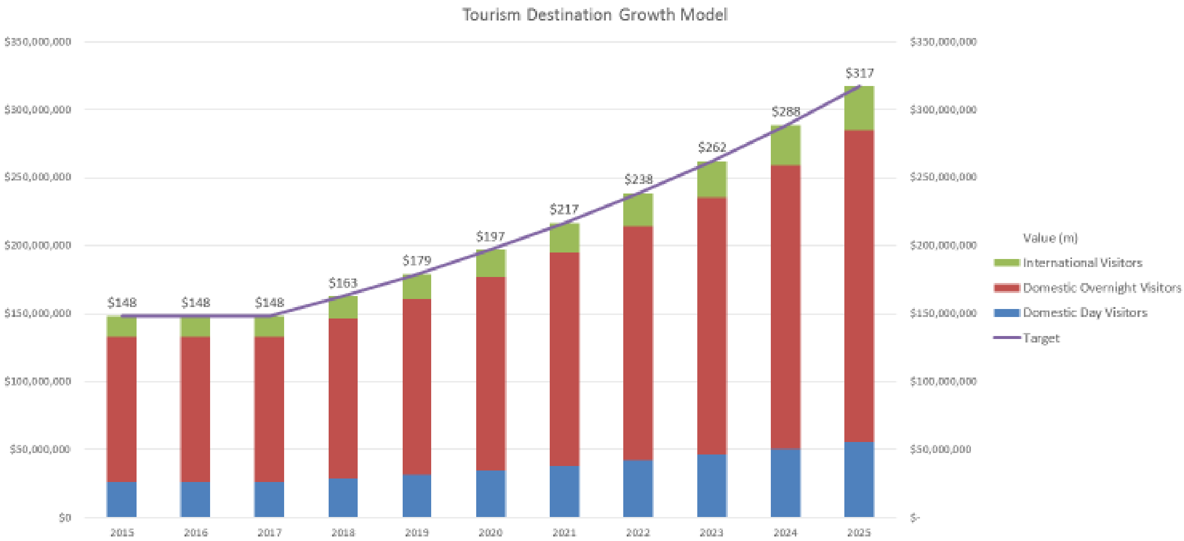
- Increased tourist volume (ie visitation)
- Increase in tourist spend
- Increased length of stay
- Improved geographic dispersion across the region
- Improved seasonality pattern

Incorporating the broader aspirations of greater Geraldton tourism stakeholders, **the four tourism goals for 2020 are:**

1. **Grow the greater Geraldton visitor economy to $197 million in 2020-21**
2. **Deliver a great visitor experience**
3. **Build industry leadership, collaboration and capability**
4. **Develop and communicate 'Brand Geraldton': a clear tourism identity**

The potential makeup of the visitor economy growth (by segment) is illustrated overleaf:

Growing the Tourism Economy



Source: Tourism Research Australia, 2016; Market Creations analysis.

Growing the Tourism Economy

Increasing Tourism By ...	**Is Worth ...**
Domestic Day Visitor	$157
Domestic Overnight Visitor (per day)	$167
International Visitor (per day)	$53

Increasing Tourism By ...	**Is Worth ...**
Domestic Day Visitor	
$10 of spending per day	$1,660,000
Extra day	$31,647,887
Domestic Overnight Visitor	
$10 of spending per day	$6,390,000
Extra day	$31,647,887
International Visitor	
$10 of spending per day	$2,810,000
Extra day	$1,334,520

Source: Tourism Research Australia, 2016; Market Creations analysis.

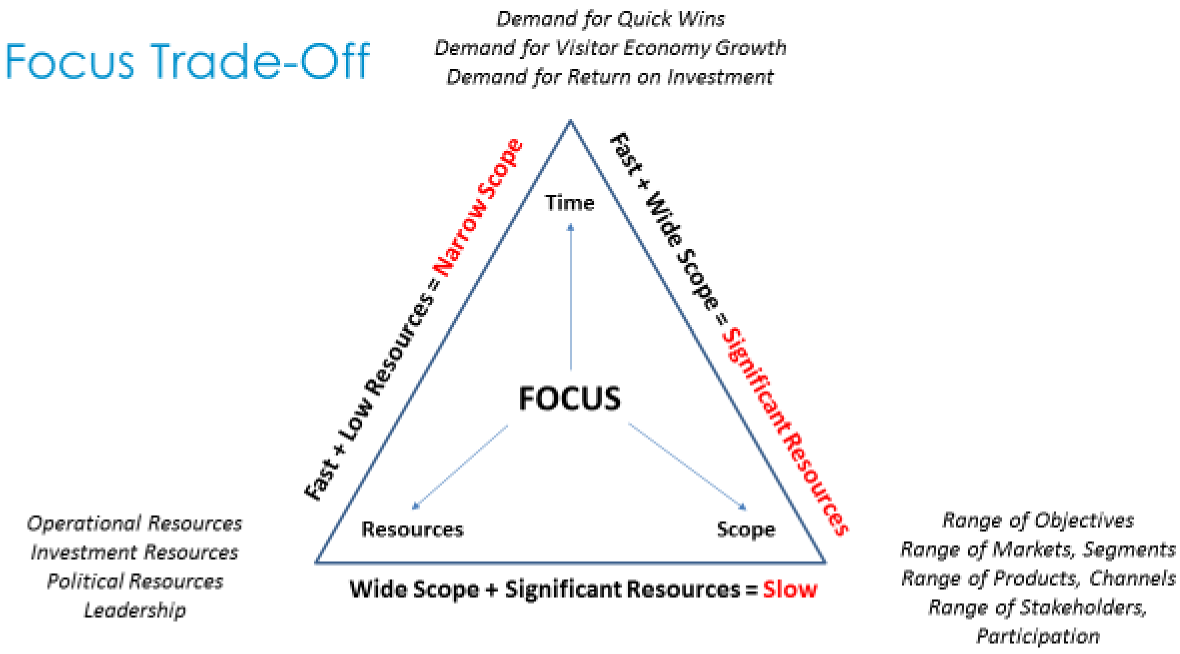
7. The Destination Strategy

Destination Strategy Concepts

To provide context for the development of the destination strategy, four destination strategy concepts are summarised below.

A. Focus Trade-Off

Tourism destination planning is always complex – there are a huge range of challenges and opportunities to consider, many stakeholders with direct and indirect interests, and many different ways in which tourism objectives could be achieved. There of course also constraints on what can be achieved, particularly in an environment of limited resources and a natural need to see results and return on any investments. This leads to the need to make trade-offs in developing a strategy and plan that balances the scope of exercise, with the resources available and the timeframe in which results can be achieved – as summarised below:



In preparing this strategy, Market Creations has recommended focusing the scope to those initiatives likely to have the biggest impact for the least (in a relative sense) resources; put another way, a narrow focus will be critical to success.

B. Distance Pull

In the Growing Destinations component of its Tourism Excellence program, Tourism Victoria asked a simple question – with many communities offering a wide range of scenic and natural attractions, cultural and heritage attractions, entertainment and recreational facilities, what makes some destinations more successful than others?

In their view, the technical term 'distance pull' defines the difference between the two. *"Distance pull refers to how important or interesting an attraction or activity is to a visitor, compared to the distance that has to be travelled to experience it. Some attractions have very strong distance pull and people are prepared to travel long distances, spend money and perhaps even undergo some inconvenience to visit them".*

Tourism Victoria highlighted the importance of being realistic when evaluating attractions in terms of their distance pull – with many regions or communities able to claim things such as beaches, national parks or heritage buildings. *"What needs to be examined is what specifically is it about them that makes them special and distinctive? To have distance-pull characteristics, an attraction generally needs to be relevant and compatible with the product strengths of the area or region".*

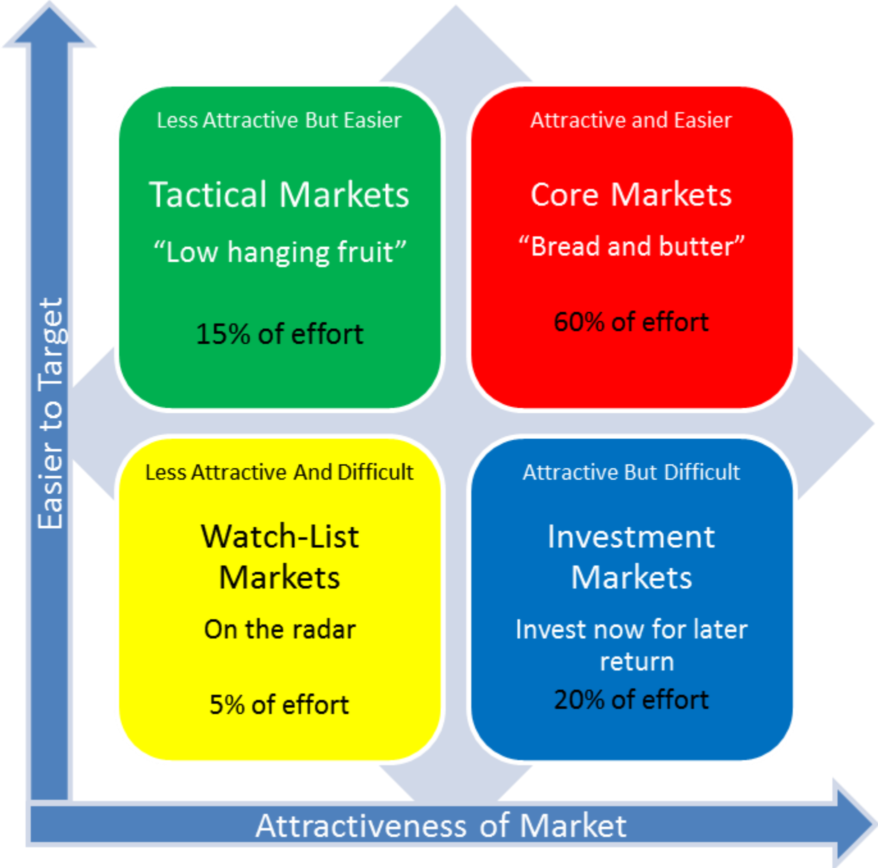
This is of particular importance when looking for growth from new markets and segments, and fits well with the TNS Destination Framework (which is widely used in destination assessment across Western Australia) which highlights the motivators to visit, and the opposing barriers:

- Motivators
  - **Density** refers to the spatial distribution of tourism assets and experiences, and is a measure of how accessible assets and experiences are from a central location. High density locations are well positioned for tourism. This supports time in-region, and repeat visitation.
  - **Diversity** measures the range of asset and experience types that are accessible from the location and is a measure of breadth of appeal. Destinations that offer a high level of diversity are well positioned for tourism.
  - **Uniqueness** refers to whether the location is the only, or one of few, locations at which the asset or experiences can be accessed. Destinations that offer unique assets and experiences that are valued by the market are well positioned for tourism (which provides the 'hook' for visiting)
- Barriers
  - **Time/Distance**
  - **Cost**
  - **Lack of knowledge**

C. Market & Segment Priority

Building on the need for focus discussed above, destination strategy should also prioritise the markets and segments being targeted for growth. South African Tourism proposed the following model to rank markets and segments based on a simple cost/benefit approach: Ease of Targeting (how difficult is it to get yield from the market?) vs. Attractiveness (how attractive is the market in meeting the visitor economy goals?).

Target Market Prioritisation Framework

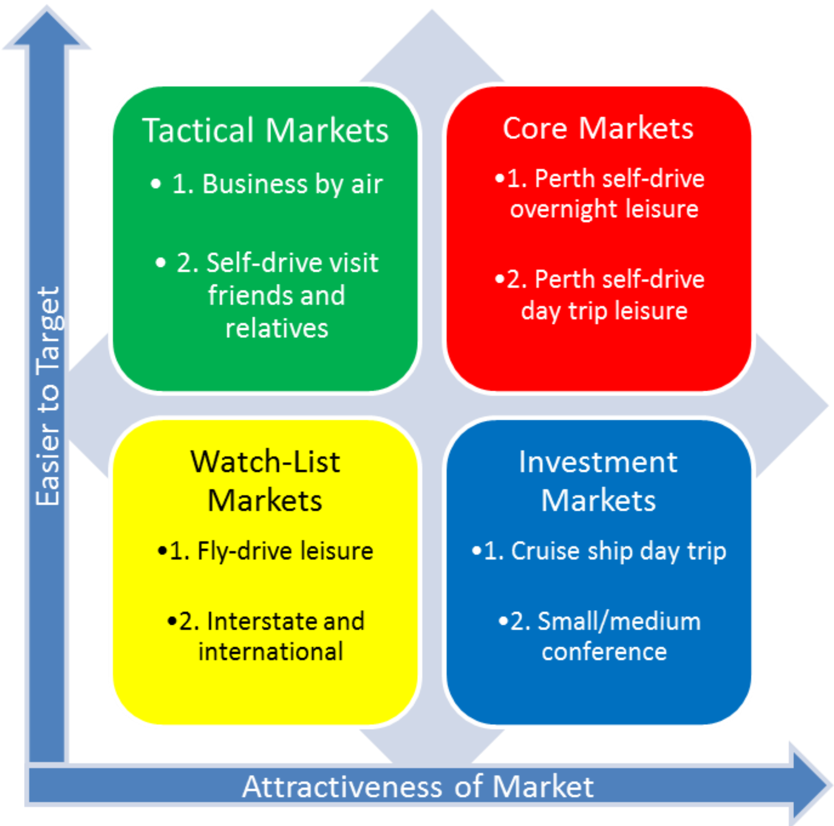


Using this approach, Market Creations undertook the following analysis, and proposed a set of selected target markets to focus the development of the destination management strategy, and later destination marketing plans (see overleaf):

Ranking of Potential Target Markets and Segments

	Relative Ease of Targeting	Relative Attractiveness of Market
Interstate	Low	Low
International	Low	Low
Cruise ship day trip	Low	High
Business by air	High	Low
Self-drive visit friends and relatives	High	Low
Small/medium conference	Low	High
Fly-drive leisure	Low	Low
Perth self-drive overnight leisure	High	High
Perth self-drive day trip leisure	High	High

Proposed Targeted Markets



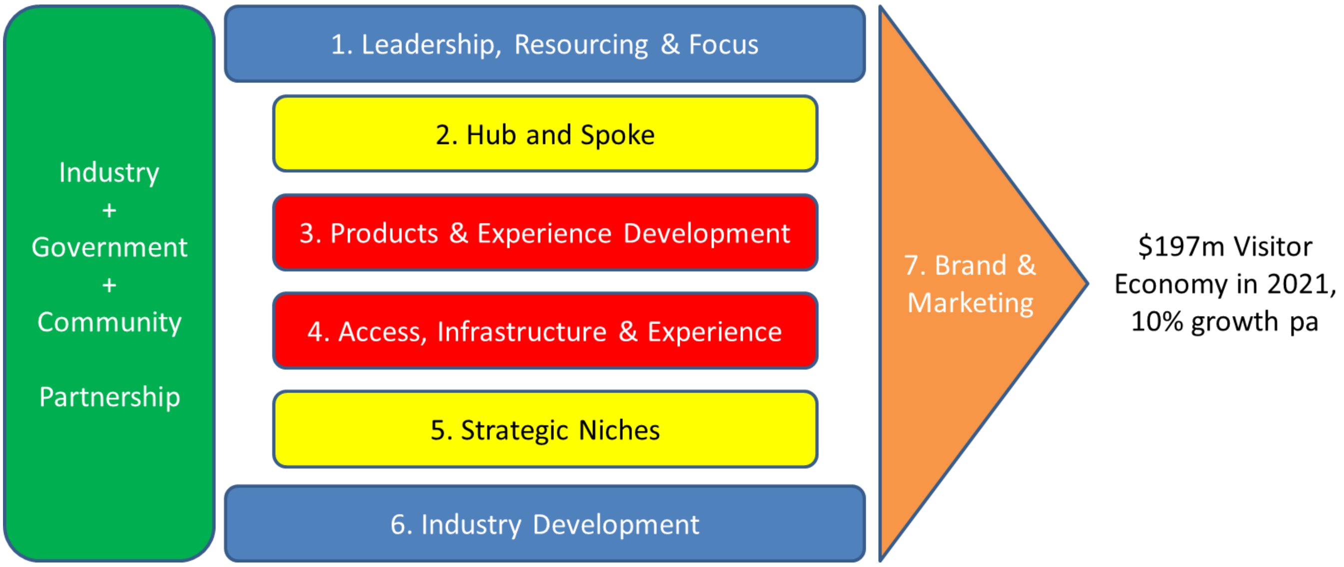
The relative priority of these markets is reflected in the strategy in the following pages.

The Destination Strategy

How will 10% growth in the visitor economy each year through to 2020 be achieved? This strategy proposes a five-fold approach:

- An industry-led, partnership-style collaboration between industry, Government and the community
- A clear and sustainable commitment to leadership, resourcing and industry development
- A narrow focus on a core market, and selected strategic niches
- Continuing effort to develop the destination over time
- Targeted brand and marketing activity to stimulate demand

Greater Geraldton Destination Management Strategy: Overview



The strategy has seven ‘pillars’ each of which has a set of supporting project initiatives:

1. Leadership, Resourcing and Focus
2. Hub and Spoke
3. Product & Experience Development
4. Access, Infrastructure & Experience
5. Strategic Niches
6. Brand and Marketing
7. Industry Development

Each of the pillars and project initiatives is described in more detail in the pages following.

Pillar 1: Leadership, Resourcing and Focus

A fundamental ingredient of the success of this plan is the degree to which all stakeholders can work collaboratively and in partnership to deliver the initiatives. This plan proposes an industry-led stakeholder participation approach, which is adequately resourced over the life of the plan. The most important choices the group of stakeholders will make are likely to be how and where to focus – and where not to focus.

Project 1A: Seek Sustainable Recurrent Funding

Engage with key stakeholders (including politicians) and industry partners to develop and present a co-funding proposal for resources in three areas: staffing, marketing, and project development.

Project 1B: Tourism Growth Facilitator Role

A second fundamental ingredient of the success of this plan is the degree to which implementation is adequately resourced. This plan proposes a full-time Tourism Growth Facilitator role within Progress Midwest, with a focus on:

- Implementation and project management of agreed tourism initiatives
- Drive key marketing activity (eg digital presence of the industry)
- Active lobbying and advocacy to key stakeholders including Tourism WA
- Active participation in local and Perth industry forums
- Traffic-light style progress reporting to Tourism Industry Leadership Group
- Administrative support to Tourism Industry Leadership Group (eg minutes)
- Data collection, compilation and reporting to support tourism KPIs

Project 1C: Support Development of the Tourism Industry Leadership Group

Voluntary industry bodies are often complex and difficult to manage and to maintain momentum. Given the importance of the Tourism Industry Leadership Group to the success of the plan, an active focus on supporting the ongoing development of this group is recommended. This would likely include forums on collaborating, exercising leadership in an industry context, and periodic reviews and feedback on performance; and having a structured, two-way communication process to keep stakeholders (and in particular operators) engaged in the plan and its implementation. The Leadership Group has proposed a number of potential subcommittees for further discussion and possible adoption (overleaf):

- Cruise Tourism (already created) - Local Port Facilities, Other WA Ports, Shoreside Access & Attractions
- Cultural, Eco & Geo Tourism - History, Natural Assets and Ecology, Creating a Tourism Zone
- Drive Tourism - Caravan Parks and Camping, Vehicle Parking, Road Signage, eGuiding
- Fly Tourism - Airline Capacity/Schedules/Fares, Air Tours, Geraldton Airport, Flights Over Abrolhos
- Food & Wine Tourism - 'Crayfish to the Plate', Promoting Abundant Local Produce
- Indigenous Tourism - Aboriginal History, Culture, Places, Food, Art
- Marine Tourism - Abrolhos Islands, Boat Cruises & Charters, Watersports, Recreational Areas
- Meetings & Events Tourism - Sporting Events, Other Events, Festivals, Conferences, Trade Shows
- Retail Tourism & Hospitality - Shopping, Restaurants, Cafes, Bars,
- Tourism Training - Vocational Training (TAFE), Indigenous Cadetships, Tertiary Qualifications

These subcommittees could potentially have an important role in managing and resourcing the implementation of the initiatives proposed in this plan – and as such are also worthy of further development and support.

Project 1D: Formal Partnerships

Australia's Coral Coast, Australia's Golden Outback and Tourism WA are funded by Government to drive tourism at a regional and State level, and are best placed to focus on the interstate and international markets (in addition to their roles with the core intrastate market). Local tourism organisations typically have a very limited ability to impact inbound tourism at the same level as these organisations.

This plan recommends developing simple but formal partnership agreements with key stakeholder organisations, focused primarily on 'piggy backing' on existing calendar activity (eg seasonal campaigns) and resources (including visitor centres in 'hub' areas), and leveraging each organisation's content distribution network (such as distributing stories and images through to airline partners and wholesalers). This would include leveraging the new London-Perth direct flights starting in 2018, which offer the potential (on some fares, such as the Walkabout Pass) for extra stops to cities such as Geraldton at a minimal cost. The partnership agreement would propose an annual workshop-style meeting with Australia's Coral Coast, Australia's Golden Outback and Tourism WA staff to discuss strategy, plans and collaborative investments.

Project 1E: Establish Tourism Cooperative Marketing Fund

Building on the above, to provide a vehicle for industry-Government collaboration in marketing a Tourism Cooperative Marketing Fund is proposed. It would likely have several tiers of participation (each with appropriate levels of input and decision making), and would integrate with the RTO partnerships.

Project 1F: Visitors Centre Business Plan

To reinforce the focus and resourcing of the strategy, this plan proposes the Geraldton Visitor's Centre business plan be linked to the destination strategy, and in particular the destination marketing strategy. The business plan would likely have some focus on the use of technology to reach potential visitors earlier in their journey.

Project 1G: Destination Strategy Launch

Consider using any major tourism events as an opportunity to launch the DMP strategy to key Perth-based tourism stakeholders, inviting the Tourism WA board and key staff (who may not have visited Geraldton in recent years), and the Minister. Consider offering famils to the Abrolhos etc. for those interested.

Pillar 2: Hub and Spoke

This Plan has identified a significant opportunity to grow the visitor economy through putting Geraldton at the centre of a 'hub and spoke' model – where visitation to Geraldton has flow-on benefits to Shires, operators and attractions in surrounding areas.

There are three themes this Pillar will reinforce:

- Positioning Geraldton as the ideal starting point or home base for exploring the region, by providing linked itineraries to the major 'spokes' being Kalbarri, Shark Bay & Monkey Mia, Wildflower Country, Abrolhos Islands, the Pink Lakes and southern Coral Coast (eg The Pinnacles/Cervantes).
- Positioning Geraldton as the perfect stopover on a longer journey – by highlighting Geraldton as the largest city north of Perth, with all the benefits that provides. This would in particular focus on the amount and range of accommodation available (which is a clear strength of Geraldton), but also the services that only a regional centre can provide (such as shopping, vehicle repair and health services).
- For both of the above, focusing on delivering a great visitor experience and providing specific offers and opportunities to stay longer and do more.

To be effective, the hub and spoke model is built on clarity of roles (overleaf):

- Progress Midwest and its partners (including the City of Greater Geraldton and Australia's Coral Coast) will be responsible for the greater Geraldton 'hub', and specifically on growing the greater Geraldton tourism economy and on encouraging visitation between Geraldton and surrounding areas.
- Organisations representing the tourism sector in 'spoke' destinations (including Shires and visitor centres in those destinations) would remain responsible for growing tourism in those areas; those organisations wishing to actively collaborate (for example by contributing or sharing resources) with Progress Midwest would be encouraged to do so. This would likely best be achieved through simple 'memorandum of understanding'-type agreements with Progress Midwest, confirming how the parties could work together for mutual benefit.

Project 2A: In-Transit Activation

Consider an outdoor advertising approach (north and south of Geraldton, starting at the boundaries of the Coral Coast region) that delivers a series of key messages and seeks to build curiosity, culminating in a call to action at critical turnoffs. Consider partnering this with a compelling offer of some kind – for example fuel discounts (eg in partnership with RAC), or attractions discounts.

Project 2B: The Stop Over Experience

Take a visitor view of the stop-over experience in Geraldton, through a focus on wayfinding to stop-over priorities: toilets, fuel, coffee, snacks/meals, playgrounds for kids; highlight access to free WIFI to generate retargeting opportunities (discussed later). Consider how to push traffic to the visitor centre and foreshore. Include clear links to and from the major highways.

Project 2C: "Stay Longer" Deals

Encourage the industry to develop, distribute and promote 'stay longer' accommodation deals, such as "Pay 3 Stay 4" offers and dynamic pricing to offer vacant inventory at reduced prices to existing guests (particularly for quiet months). Visitor research found that accommodation deals are the single biggest trigger for potential visitors. This could be implemented in collaboration with the Geraldton Visitor Centre (for booking agency services) and Australia's Coral Coast.

Project 2D: Fly-Drive Packages

Collaborate with RTO's and airlines to develop fly-drive packages, where visitors can fly in one direction (to Geraldton, or Exmouth) and drive in the other, using Geraldton as a home base or stopover.

Project 2E: Create 'Spoke' Partnerships

Collaborate with the stakeholders responsible for the key 'spoke' attractions (Kalbarri, Shark Bay & Monkey Mia, Wildflower Country, Abrolhos Islands, southern Coral Coast including Dongara) to identify specific opportunities to collaborate and drive visitor traffic in both directions. One example of this would be for each destination to promote the same/similar regional itineraries for how to visit the broader area, with Geraldton as the accommodation centre.

Project 2F: Qualitative Research

As recommended in the 2016 Perceptions study, undertake qualitative research with current and potential visitors. For example, explore how a hub and spoke model work best from a consumer perspective, how the stop-over and wayfinding experience could be improved, and how best to communicate greater Geraldton in the context of the strategy.

Project 2G: 'Introduction to the Region'

Seek the support of surrounding Shires to display (for example in signage and at visitor centres) an overview of the region and contact details for surrounding visitor centres, so the visitor can enter the region seamlessly and can easily access relevant information.

Pillar 3: Product & Experience Development

The core long-term element of the destination strategy is to develop the products, experiences and events required for Geraldton to become a destination in its own right in the long term. Focused on filling identified gaps, the plan proposes a market- and industry-led approach to prioritising potential development projects.

Project 3A: Product Development Process

The plan proposes the Tourism Industry Leadership Group, with the support of Progress Midwest, utilises a 'stage gate' approach to prioritising, selecting and developing product and experience development projects. Put simply, this approach puts all proposed ideas into the top of a funnel, and those selected at the first stage are developed further (for example into a concept paper); those at the first stage are prioritised again, with those selected at the second stage developed further (for example into a feasibility study), and so on into business/investment cases and formal development proposals.

A simple points-ranking approach is recommended for assessing potential projects, as follows (overleaf):

Recommended Approach for Assessing Potential Projects

Score	Time	Visitor Impact	Cost	Yield Impact
3	Could be developed in 1-2 years	Would likely result in a significant increase in number of visitors	Low cost of development	Would likely result in a significant direct increase in visitor expenditure
2	Could be developed in the next 3-5 years	Would likely result in an increase in number of visitors	Medium cost of development	Would likely result in a mild direct increase in visitor expenditure
1	Would take more than 5 years to develop	May or may not increase visitors	High cost of development	Would likely result in a relatively small increase in visitor expenditure

Using this approach, potential projects would be prioritised by the Tourism Industry Leadership Group into two broad groups:

- Category 1: Growth Projects
- Category 2: Catalyst Projects (“Game Changers”)

A number of potential product development projects were identified through a combination of stakeholder consultation, reviewing past and current tourism plans, and the ideas contributed by workshop participants. As these are all at varying stages of development, they are presented here as a list to be used by the Group as a starting point for prioritisation and development where appropriate.

In mid-2017 the Mid West Development Commission noted that it had engaged third party consultants (ACIL Allen) to review the likely visitor and economic impact of the “game changing” tourism projects in the 2014 Mid West Tourism Development Strategy. The results of this analysis may support ranking and selection of the Catalyst Projects listed overleaf. A summary of the analysis notes a Progress Economics report was prepared for the Department of Fisheries in relation to the Abrolhos; and a GHD scoping study was prepared for the laser lights concept.

The subcommittees of the Tourism Industry Leadership Group (eg Maritime History Subcommittee) are likely to provide important input into the assessment of these projects.

Category 1: Growth Projects (to be prioritised by the Tourism Industry Leadership Group)

#	Project	Description
1	Rock Lobster Retail	Create a "Lobster Shack"-style focal point for seafood tourism and retailing in the Fishing Boat Harbour. For example, a market/food-hall style environment where multiple retailers can have a presence in one place, integrated into the live lobster tours. Consider showcasing other local/regional produce. Combining or co-locating with a heritage experience may further increase the appeal.
2	History & Heritage Activation	Develop a planned approach to activating greater Geraldton's unique heritage and maritime history. While a museum redevelopment has been discussed for some time (see below), there are a range of other opportunities including interactive/digital interpretation.
3	Medallia Beach Underwater Park	Our understanding is that this concept mirrors similar developments in Western Australia (including Jurien Bay) and elsewhere, with a self-guided underwater snorkelling trail using an underwater path with associated maps and signage.
4	Foreshore Laser Lights Show	Our understanding is that this concept seeks to replicate the success of night-time water-based light shows in cities such as Hong Kong and Dubai, using a largely automated production that has a high up-front capital cost but relatively low ongoing operation and maintenance costs.
5	WA Museum expansion Geraldton	The 2011 Mid West Investment Plan and 2014 Mid West Tourism Development Strategy listed the WA Museum Geraldton expansion as a tourist investment opportunity (from master plan reference 154), including a HMAS Sydney II Gallery. Estimated cost was $15m with a one to four-year timeframe.
6	Inland Conservation Block Tourism Development	As discussed in this plan, there are a range of DPAW and private natural assets that could be developed for tourism use by improving leisure, recreation and conservation amenity. These include Karara and other holdings in the Moresby Ranges.
7	Mountain Bike Sites	From 2014 Mid West Tourism Development Strategy: 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.
8	West End Cultural Precinct	From 2014 Mid West Tourism Development Strategy: 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.

Category 1: Growth Projects (continued)

#	Project	Description
9	Geraldton Caravan Park Feasibility	From 2014 Mid West Tourism Development Strategy: 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.
10	Overnight Rest Bays	From 2014 Mid West Tourism Development Strategy: Investigate the development of 24hr overnight rest bays within 25-75km of Geraldton.
11	Regional Hinterland Short Stay Campsites	From 2014 Mid West Tourism Development Strategy: 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. Note this dovetails with the Mid West Coastal Nodes camping project, for which $2.52 million was budgeted and works commenced in 2016.
12	Central Greenough Hamlet Upgrade	From 2011 Mid West Investment Plan: As masterplan reference 834, it was proposed to upgrade the central Greenough Hamlet for tourism purposes.
13	Batavia Park Development (Underway)	Proposed by the Batavia Coast Maritime Heritage Association: A sequence of interpretive structures to complement the existing Wiebbe Hayes statue and to provide links to the WA Museum displays and maritime heritage sites elsewhere along the Batavia Coast.
14	Batavia Coast Maritime Heritage Trail	Proposed by the Batavia Coast Maritime Heritage Association: A linked interpretation of Geraldton's maritime history: Aboriginal middens Bluff Point, Lighthouse Keepers Cottage, Batavia Marina, WA Museum Geraldton, Batavia Park, Champion Bay Foreshore, The Esplanade and Port, Fishing Boat Harbour, Point Moore Lighthouse, HMAS Sydney II Memorial.
15	Fishing Heritage Centre	Proposed by the Batavia Coast Maritime Heritage Association: A tribute to pioneer fishermen and to those who have lost their lives in the fishing industry on the Batavia Coast. Note there may be potential for links to the rock lobster retail concept.
16	Midwest Geotrail	Proposed by the Batavia Coast Maritime Heritage Association, in two parts. Part A: a collection of large (1+ metre high) rock and mineral samples displayed along the walkway of the Geraldton Esplanade. Part B: A Midwest Geotrail connecting sites of geological interest (minerals, rocks and landforms) with appropriate interpretive signage.

Category 2: Catalyst Projects ("Game Changers")

#	Project	Description
17	Abrolhos Islands	The recent change of Government has again impacted the future of the Abrolhos – a project that has been considered at least four times in 20 years. It remains a significant 'catalyst' opportunity – but with high community expectations and many stakeholders, will need the right leadership, structure and significant resources. The ideal model would incorporate both land and marine conservation, with an integrated approach that incorporates tourism.
18	City Centre Revitalisation	This plan supports the importance of the City Centre Revitalisation Plan (part of the Greater Geraldton Growth Plan), and highlights two focus areas: making the overall CBD area more attractive to and utilised by visitors, and secondly the opportunity for future City land developments to incorporate tourism uses. The latter might include the Batavia Coast Marina Stage 2 development precinct, and also Lot 601 within that project – which could potentially be suited to luxury hotel/resort accommodation (some limited evidence from 2016 indicated there may be potential demand in this segment).
19	Geraldton Airport Upgrade	Upgrading and extending the runway, with additional apron capacity, will enable the unrestricted operation of larger aircraft types, including types capable of direct Interstate and International Passenger and Freight services. The City has sought capital funding assistance from Federal and State Governments to support tourism and trade development, with the additional benefit of enhancing the role of the airport as an alternative landing airport for Perth, with significant economic benefits flowing to State tourism inbound via Perth.

Pillar 4: Access, Infrastructure & Experience

Project 4A: Shore-side Cruise Infrastructure

Building on the success in the cruise passenger market to date, there is an opportunity to invest in shore-side infrastructure to support cruise ship disembarkation and amenity – for example shade adjacent to disembarkation, and facilitating direct access to town. Stakeholders have suggested considering an industrial theme in fitting with the port environment. Looking long term, there is the prospect that once issues in Exmouth and Broome are addressed, Geraldton will be very well placed for substantial growth in volume for cruises ex-Perth. Longer-term, should demand support it there may be opportunity for a dedicated cruise berth ("Berth 8") to support more cruise ship visits, and a better visitor experience (including safe, efficient access into the Geraldton Foreshore, Geraldton Visitor Centre and beyond).

Project 4B: Signage & Wayfinding

There has been consistent feedback via tourism plans for some years that there is an opportunity to improve tourist wayfinding within Geraldton with improved and consistent signage. This should be extended into the digital domain (for example in ensuring Google Maps information is up to date for key attractions). This plan recommends working with the City of Greater Geraldton to address the issue, commencing with a signage audit.

Project 4C: Geraldton Entry Statement

Once again, a number of past plans have identified an opportunity for an entry statement(s) providing a formal entrance to the city, that includes visitors as a target audience; work on entry statement concepts was undertaken by the Geraldton Visitor Centre, Rotary and Rev Design in 2014, and in 2017 by the City of Greater Geraldton's Corporate Communications Team). This plan recommends working with the City of Greater Geraldton to develop concepts and funding for a bold entry statement, that reinforces the agreed positioning, and that potentially links into the in-transit outdoor advertising discussed earlier.

Project 4D: Shark Barriers

With the ocean and beaches the number one asset from a tourist perspective, stakeholders have identified a need for shark barriers or similar protection – to support safety both for visitors and locals alike. Similar projects are being undertaken by Perth shires, and are widely implemented in Eastern Australia.

Project 4E: Vibrant Visitor Experience

There has been consistent feedback over some years around perceptions of the city centre not being activated or vibrant, with specific feedback about 'after 5pm' dining and nightlife. Similarly, there has been feedback regarding retail trading hours (which has been consistently identified as an issue, and polarises many stakeholders) and customer service levels provided to visitors. While issues such as trading hours are beyond the scope of this plan, there is an opportunity to collaborate with stakeholders (including the City of Greater Geraldton, and city retailers) on township activation and development, and potentially nightlife including entertainment and night markets. This initiative would link closely with the City Centre Revitalisation Project as part of the Growth Plan.

Pillar 5: Strategic Niches

Geraldton has several experience types that have appeal, but only to a relatively narrow group of potential visitors. These all have the ability to draw visitors, but can also be off-putting to those without an inherent interest in them (eg "I am not interested in fishing, therefore Geraldton is not for me"). These experiences are best promoted in a targeted way, to directly impact on the desired audience, without creating a false impression on a broader audience that those niche experiences are all Geraldton has on offer.

Project 5A: Events, Sports & Conferences Strategy

Conferences and certain events are unique in that they bring entirely new visitors to the region, creating genuine growth in the visitor economy. The recent opening of Geraldton Multipurpose Centre on the foreshore, the refurbishment of the Queens Park Theatre and the forthcoming opening of The Gerald Apartment Hotel with a possible conference facility provides an opportunity to build a targeted events and conferences strategy, working with partners such as Perth Convention Bureau (conferences) and the City's Events coordinator (events). Some regions offer specific incentives tied to the economic impact of conferences and events. Past plans have recommending considering events that are authentic to the region (eg seafood, history, wind sports), and continuing to "import" events with a built-in audience (eg One Night Stand, Fringe Festival). Stakeholders suggested arts and culture opportunities for visitors may be currently under-represented, which could tie-in to an events strategy; the potential to extend the successful Artdrive project into a larger regional event (such as a 'Coral Coast Artdrive') was highlighted.

Project 5B: International Visitors

International visitors are a small but strategically important focus segment for growing the visitor economy – and while Tourism WA and RTO's have responsibility for marketing to this group overall (and so would be reflected in partnership agreements with those organisations), tactical engagement (for example targeting the China market, building on the success of recent years through operator air charters) could be continued on a cost/benefit basis. Together with China, Singapore and Malaysia are Tourism WA's "maximise potential" priority segment; while other segments classified as "protect our position" by Tourism WA (UK, Germany, New Zealand, USA) remain important, these are unlikely to justify investment beyond that already undertaken by those organisations.

Project 5C: Food Experiences

Food and wine tourism is a focus in the State tourism strategy, and there may be opportunities to extend food experiences beyond the food trail and food and wine expo into other means of showcasing local produce (particularly seafood, and of course lobster) – for example by further encouraging and incentivising local hospitality venues to highlight local produce. While greater Geraldton does not have a wine sector, there are rum, beer and cider attractions which could be utilised. Separately, there may be 'outbound' food promotion opportunities to influence future visitation, by showcasing regional produce to visitors in other locations - for example targeting the Perth market, using an Abrolhos Islands brand; or using the upcoming Yagan Square market hall (in the Perth CBD) which will include opportunities to showcase regional producers.

Project 5D: Indigenous Tourism Experiences

A number of past plans have highlighted gaps in indigenous tourism experiences, particularly for international visitors; there are limited experiences currently available (a notable exception is the recent launch of one- and two-day aboriginal tours by a local bus operator). While there may be potential future opportunities (for example through working with Bundiyarra Aboriginal Community Aboriginal Corporation), there are no new indigenous-specific tourism concepts tabled at present. There may be opportunities to support the long-term development of new indigenous tourism experiences, potentially starting with experiences for cruise ship passengers, and perhaps focusing on bush food. This would likely draw on the support of the Indigenous Tourism subcommittee of the Tourism Industry Leadership Group, together with third party organisations such as WAITOC and the City of Greater Geraldton's Aboriginal Officer.

Pillar 6: Industry Development

The foundation of the destination management strategy is a continued commitment to and investment in the development of the skills and capabilities of operators in the industry. This builds on activity already undertaken by organisations such as the Tourism Council of WA, and demonstrates the long-term commitment to ongoing improvement in operator businesses and so visitor economy outcomes.

Project 6A: Industry Capability

Stakeholder feedback suggests there may be opportunities to facilitate the delivery of operator training in targeted areas to support growth in the visitor economy – including dynamic pricing/inventory management, distribution/wholesaling (including the long-term benefits of improved distribution relative to the margin sacrifices required), industry skills and employment, and existing activity such as the “Know Our Product” initiative.

Project 6B: Cruise Industry Capability

Building on the significant past and current effort to support the growth of cruise passenger market, and the formation of a cruise-focused subcommittee of the Tourism Industry Leadership Group, there may be an opportunity to continue to invest in operator capability and product development in this area. This could include: supporting alignment of existing product with cruise ship timing and day-trip windows; development of new product (with existing and/or new operators); continued training and volunteer development including accreditation.

Project 6C: Community Value of Tourism

Building on the recently-commenced Tourism is Everybody’s Business campaign, there is an opportunity to seek to influence community perceptions of tourism and visitors. This is likely to have most impact by appealing to the interests of the community, for example jobs and the economy; for example, by reinforcing “what’s in it for me”-type messaging: if a tourist comes to Geraldton and has a good experience, they will spend more and come back – leading to more jobs and a better economy. Stakeholders have suggested a campaign like this has the potential to be extended beyond Geraldton.

Pillar 7: Brand and Marketing

A detailed Destination Marketing Plan is proposed to follow this management plan, and a number of potential linkage points are summarised here. Importantly, expert stakeholders have highlighted that Geraldton is unlikely to ever be able to compete with the media budgets nor share of voice of competing destinations in WA, Australia or internationally – and so any marketing is unlikely to utilise traditional media, and ‘working smarter’ will be required. Further, expert stakeholders have indicated effort be prioritised towards the ‘in transit’ stage of journey planning, given other tourism marketing organisations are better placed to focus on earlier stages.

Based on feedback from stakeholders and comparison with best practice destination marketing principles, Market Creations undertook a high-level comparison of the likely effectiveness and efficiency of the range of potential marketing channels – as follows:

Comparison of Potential Marketing Channels

	Effectiveness (Reach)	Efficiency (Returns)	Suggested Weighting
Digital presence (eg web, maps)	High	High	15%
Digital advertising (paid)	High	Medium	20%
Digital search (SEO, SEM)	High	Medium	15%
Touchpoint/point of sale	Medium	Medium	10%
Social media	Medium	High	10%
Public relations (traditional)	Medium	Medium	5%
Public relations (digital)	High	Medium	10%
Television	Medium	Low	0%
Press	Medium	Low	0%
Radio	Medium	Low	0%
Outdoor	Medium	Medium	15%

Project 7A: ‘Brand Geraldton’

A starting point for a new marketing strategy should be the development of a full tourism brand identity for Geraldton – going beyond a logo or tagline alone, this should explore and confirm the key messages and narratives the brand is to communicate. The brand should support the visitor economy goals, the destination strategy, the priority target markets, and the likely media mix (see above).

As discussed in the situation analysis, the ‘Geraldton: Take a Fresh Look’ is the best brand platform to utilise, but should be repositioned with a clearer and more appropriate identity, and a focus to driving consideration and positioning as an ideal starting point or home base for regional travel.

The brand should seek strong alignment with the RTO and Tourism WA brands (eg Just Another Day in WA), and to clarify which brand territories it is to cover – for example any links to ‘Crayfish Capital’, branding of Indian Ocean Drive (being “Route 60”), potential ownership and/or use of Abrolhos Islands branding (eg into the seafood area), and Geraldton’s unique positioning (whether that be its diversity of surrounding attractions, as a gateway/hub, and/or being the largest city north of Perth).

Finally, the strategy should outline how any transition and consistency will be achieved across the many media (including signage) where the brand is likely to be used (eg signage en route from Kalbarri still has Batavia Heritage Coast branding).

This plan proposes a structured, step-wise and evidence-based approach to developing ‘Brand Geraldton’, which will include:

- Stakeholder consultation
- Review of best practice and competing destinations
- Creative concept development
- Concept testing with stakeholders and consumers
- Approvals and registrations
- “Brand book” guide
- Launch

Project 7B: Digital First

Any investment in formal marketing should be digital-first, and focused on activating demand– that is, providing specific offers that support the destination strategy (eg offers relating to making a stopover, staying longer, and/or doing more while in Geraldton). There may be opportunities to do this via digital advertising retargeting, leveraging the City’s existing investment in public WIFI. A digital-first approach goes beyond advertising, with having an active and accurate digital presence critical (for example on tourism platforms such as TripAdvisor, which can also generate immediate feedback on the visitor experience) and also in having a compelling library of professionally-commissioned images and stories available for use by marketing partners (such as that being developed by Australia’s Coral Coast, which could be utilised and contributed to rather than replicated).

Project 7C: Touchpoint Activation

A consistent challenge in en route and in-market tourism marketing is reaching visitors at critical moments of decision making around travel pathways, attractions and activities – and in particular to “up sell” them into staying longer or doing more. An important channel for doing so are ‘touchpoints’ where visitors come into direct contact with individuals that can influence such decisions – for example at the airport, visitors centre, hotels and hire car counters. Activation might involve encouraging these organisations to utilise existing tools and content (such as the Geraldton Holiday Planner) using an “up sell”-style approach.

Project 7D: PR & Social

Taking a ‘working smarter’ approach, and building on the existing work of the Visitor’s Centre and Progress Midwest, there is an opportunity to take advantage of partners channels (specifically RTO’s) to distribute compelling stories and images online and to selected media.

Project 7E: Niche Campaigns

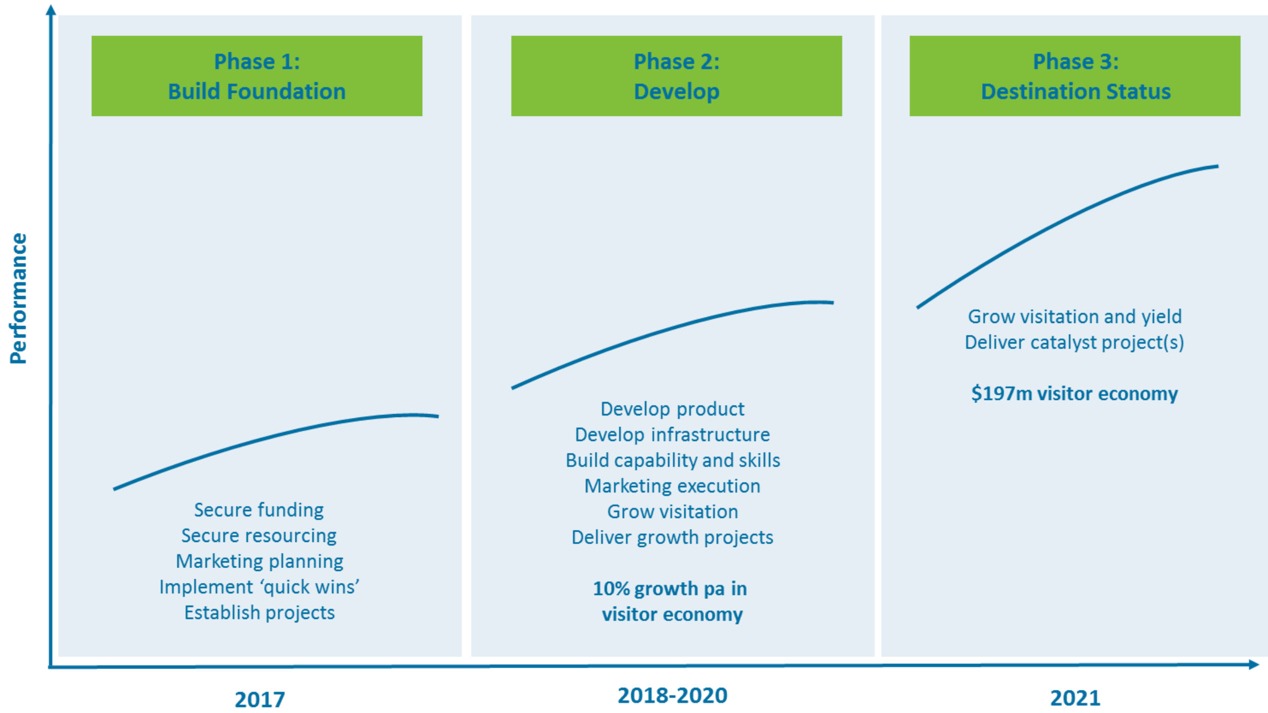
A further potential Cooperative Marketing Fund opportunity is to support targeted campaigns to support the strategic niche strategy outlined earlier. Working in partnership with RTO’s, this is likely to involve using some combination of print, online and/or event-based marketing to promote experiences in each niche (eg fishing publications, online surf-related sites, caravan and camping shows, tour operators, diving websites).

8. Road Map: Implementing the Strategy

The destination management strategy and plan takes a 'road map' approach, where the program takes a number of natural stages, phased over a four-year period to 2021:

- Phase 1: Build the Foundation
- Phase 2: Develop the Destination
- Phase 3: Destination Status

Roadmap Phases



The timing of each of the projects supporting the seven pillars has been prioritised and phased to line up with the broader roadmap; this timing is summarised in **Appendix 4** – including 'quick wins' to be implemented in 2017.

Monitoring and Evaluation

Market Creations recommends the monitoring and evaluation of this plan be undertaken by Progress Midwest in conjunction with the Tourism Industry Leadership Group – as follows:

- "Traffic light" review of progress in implementing the projects and initiatives, in line with the action plan (to be reviewed at each Tourism Industry Leadership Group meeting, with a major review annually).
- Annual review of progress against the four destination goals:
    - Grow the greater Geraldton visitor economy to $197 million in 2020-21
    - Deliver a great visitor experience
    - Build industry leadership, collaboration and capability
    - Develop and communicate 'Brand Geraldton': a clear tourism identity

The proposed annual review would assess progress against the specific targets Progress Midwest may set in relation to the composition of growth in the tourism economy (for example the split between growth in the number of visitors, length of stay and spend per day) using the Tourism Growth Model that Market Creations has provided.

DESTINATION
MANAGEMENT PLAN

APPENDICES

GERALDTON

TAKE A FRESH LOOK

Appendix 1: List of References

1. Guide to Best Practice Destination Management, Australian Regional Tourism Network, 2017.
2. Mid West Tourism Development Strategy, Mid West Development Commission/Regional Development Australia, 2014.
3. Australia's Coral Coast Destination Development Strategy (Update), Tourism WA, 2007.
4. Growing Greater Geraldton: A Growth Plan, Growth Plan Partnership/City of Greater Geraldton, March 2017
5. Geraldton-Greenough Tourism Strategy, Mid West Development Commission, 2009.
6. Perceptions of Greater Geraldton, Landcorp (by TNS), 2016.
7. State Government Strategy for Tourism in Western Australia 2020, Tourism WA, 2017.
8. Geraldton City Centre Revitalisation Plan (Final and Priority Actions), City of Greater Geraldton, 2017.
9. Mid West Regional Blueprint, Mid West Development Commission, 2015.
10. Mid West Investment Plan, Mid West Development Commission, 2011.
11. State Election Priorities 2017, City of Greater Geraldton, 2017.
12. Lot 601 Options Report (Unpublished), UDLA, 201, February 2017.
13. RV and Campervan Stay Survey Results, City of Greater Geraldton, September 2016.
14. Greater Geraldton Economic and Community Profile (Tourism), REMPLAN, 2016.
15. Tourism Industry Leadership Group – Draft Terms of Reference, 2017.

Appendix 2: List of Selected Stakeholders

Tourism Industry Leadership Group Presentation - Participants

- Geraldton Air Charter
- Shine Aviation
- Dongara Tourist Park
- Ultimate Water Sports
- The Gerald Hotel
- Eco Abrolhos
- City of Greater Geraldton
- Geraldton Visitors Centre (guest)
- Regional Development Australia
- Progress Midwest
- Mid West Chamber of Commerce and Industry
- Broadwater Hotels and Resorts
- Australia’s Coral Coast (guest)
- Qantas Airways (guest)
- Mid West Development Commission (guest)
- Batavia Coast Maritime Heritage Association (guest)

Key Stakeholders Consulted

- Mid West Development Commission
- Tourism WA (aviation, events, indigenous tourism, cruise shipping, visitor’s centres, food and wine, domestic marketing)
- Australia’s Coral Coast
- Department of Parks and Wildlife
- Great Southern Development Commission

Appendix 3: TNS Tourism Asset Review (2016)

TNS conducted a detailed tourism asset review as part of the 2016 Perceptions research, which is included here as it formed the basis of the Plan's analysis and recommendations in relation to product and infrastructure.

A. Overview

Geraldton (and its surrounds) house 7 broad categories of tourism asset (note: These categories are not mutually exclusive and many interact with multiple other categories):

History and Heritage

- Including memorials/Museums, Historical/ Heritage Sites/Landmarks and Interpretive signage tours
- This area is quite well-supplied, both within Geraldton itself and in the surrounding areas
- The Batavia Shipwreck is the stand-out experience(s) in this category
- Consumer data indicates this category holds high interest for visitors and potential visitors and as it is at least somewhat differentiating, is a good candidate to use as an experience category to "define" Geraldton's tourism offer (with support from natural heritage)
- Feedback from Stakeholders suggests one area for improvement in the history category would be to make some of the current experiences more immersive and involving for visitors (e.g. going beyond interpretive signs by incorporating technology, better storytelling, introducing other elements such as culinary)

Nature

- Including Walks & Trails, Marine/Coastal, Beaches, Wildflowers, Wildlife and Parks
- This category crosses-over heavily with the *Active* and *History* categories
- Wildflowers and the Abrolhos Islands are the stand-out experiences in this category
- The Nature category is not as well served by Geraldton as in other parts of the Coral Coast – simply due to the fact that Geraldton is a Regional City, compared to smaller regional towns
- As such, the better (more unique and appealing) parts of Geraldton's nature offer are outside of Geraldton itself (inland to wildflowers and offshore to the Abrolhos)
- One way of strengthening Geraldton's nature offering would be to establish closer ties to Kalbarri (and Kalbarri National Park), more firmly positioning Geraldton as an access point for these experiences

Active

- Including Walks & Trails, Water Sports, Fishing and Adventure Tours
- This category crosses-over heavily with the *Nature* category
- Water sports are well-represented, though feedback from Stakeholders indicates there is a lack of options for hiring the gear required for some of these activities in-region
- Marine water sports (e.g. snorkelling & scuba diving) may suffer by comparison to the rest of the Coral Coast, due to their lack of easy accessibility
- i.e. such activities are largely associated with the Abrolhos Islands and therefore require some time, effort and cost to access
- This compares to many places in the northern part of the Coral Coast, where snorkelling etc. spots are accessible straight off the beach

Arts & Culture

- Including Galleries, Public Art, Arts & Crafts, Theatre, Libraries and Events
- The arts are not currently well-represented in Geraldton’s tourism offer and feedback from some Stakeholders indicates these could be much better served than they currently are
- Events that incorporate cultural elements would be a good option to pursue – particularly if they bring along an already-invested audience (as in the case of “One Night Stand”)
- A history-themed event might also be worth pursuing, to match with the asset category that holds best interest for consumers
- A consistent history ‘theme’ to promotions and development of events will help define Geraldton for potential visitors

Culinary

- Including Local Produce, Wineries, Fine Dining, Casual Dining, Fast Food and Take Out, and Speciality Café/Restaurant
- Geraldton’s culinary offering is strong, relative to the northern Coral Coast area, however, feedback from stakeholders indicates it requires further development, particularly in terms of:
- Location of venues (to incorporate more coastline locations and locations with views)
- Opening hours – felt to be limited and/or inflexible
- Availability of local produce (particularly lobster)
- Fine dining options – currently limited in number

Accommodation

- Including Bed and Breakfast, Hotels, Motels, Caravan Parks, Camping Sites, Private Rentals, Apartments and Backpackers
- Geraldton's accommodation offering is one of its strengths, particularly relative to the wider Coral Coast region
- Accommodation in the northern Coral Coast is not rated well among consumers, particularly in the area of value, while Geraldton's rating of value is very strong, relative to other regional WA destinations
- However, consumer accommodation usage and preference data indicates self-catering options (particularly chalets/villas) may be undersupplied, relative to consumer demand
- Consumer preferences also indicate a gap in the market for a higher-end, luxury hotel or resort – this may be worth considering in conjunction with the development of the Abrolhos, given that access to the islands is already relatively costly

Retail

- Including Local Markets, Shopping Centres, Shopping Strips, and Speciality Shops
- Visitors mention "better shopping"/ "more shops" as one of the potential gaps in Geraldton's tourism offer
- Opening hours were not commented on favourably by stakeholders and were also mentioned by past visitors as an area that needs addressing
- Any developments in the area of retail should focus on local produce/ products to increase uniqueness
- Research from TNS' syndicated study Domesticate shows that the type of retail offer that is of most interest to travellers is local markets

B. Relative to Other WA Destinations/ Regions

Coral Coast

Compared to the broader Coral Coast Region, Geraldton has relative strengths in the amount, range and quality of product in the categories of:

- History & heritage
- Retail
- Culinary
- Accommodation

However, the wider region has much stronger (and more appealing and accessible) offerings in the areas of:

- Active – particularly swimming, snorkelling and scuba diving
- Nature –in terms of coastal and marine environments and in particular, marine wildlife

Australia's South West

More broadly, Geraldton obviously lags significantly behind the South West Region of WA in terms of culinary assets; it also lags behind this region in Arts & Culture, Accommodation, Retail and in some aspects of Active and Nature (e.g. walks, cycle tracks, wildlife)

Australia's North West

Relative to the North West, Geraldton is largely on-par with Broome in terms of its History & Heritage offer, but substantially trails the Kimberley in the category of Nature

C. Regional Positioning

Being a city, Geraldton has services and a density of facilities that other places in the Coral Coast lack:

- In particular, the Coral Coast is substantially lacking in the areas of culinary experiences (everything from groceries to fine dining)
- Also in the area of accommodation (where value for money self-catering options are felt to be lacking)

Geraldton is more able to meet these needs for consumers than many other places in the Coral Coast (and certainly more so than other towns in the "Southern Part" of the Coral Coast):

- However, this is not to say that Geraldton's current culinary and accommodation offerings are of high quality – culinary experiences, in particular, need vast improvement to reach the standard of an objectively good offering
- Self-catering accommodation options also appear to be under-supplied

Geraldton should be well-placed to position itself as an accommodation hub – a 'comfortable' and 'civilised' base from which consumers can explore into the region more widely, however, its inherent lack of appeal and perception as a working town, rather than a tourist town, are barriers that must be overcome to make such a positioning viable.

D. Asset SWOT Analysis

Strengths

Geraldton's History and Heritage offer has several strengths:

- It is specific (if only unique at the contextual level)
- The Batavia has an engaging story, with the potential for greater exposure in the future (movie development)
- It is also varied – shipwrecks, war history, missionary history etc.

Abrolhos has appeal, but is currently underdeveloped:

- Even when developed, this asset is likely to have appeal mainly to specialists – with an inherent interest in marine activities

Coastline/ beaches have broad appeal, but we know from previous research that, in themselves, they are neither a compelling reason to visit, nor a differentiating factor:

- Foreshore redevelopment is attractive (though unlikely to motivate)
- Wind sports offers a degree of diversity; however, this is a very niche area and should not be central to identity or promoted with a broad-brush approach

Links beyond Geraldton to other places/ experiences in the area offer a reason for visiting:

- But, linkage to region more broadly could be better established and leveraged
- Nature offer is appealing – but is largely beyond the city bounds and therefore Geraldton needs to be positioned as the access point for the high-appeal nature experiences (e.g. Wildflowers & Abrolhos Islands)

While culinary and accommodation offers are not optimal, they are better than in most other places in the area.

Weaknesses

Geraldton's tourism asset offer lacks uniqueness, a 'hero' product (or even product category) and a 'wow factor':

- Additionally, there are reputational issues, with an association between Geraldton and social issues
- Above all, there is a lack of knowledge about Geraldton's tourism offering – to the point that the City is not primarily perceived as a tourism destination, but rather a working town

Under-developed culinary offering:

- Casual dining felt to be under-served and also not ideally located
- Very few fine dining options
- Stakeholders felt culinary could support other experiences better (e.g. casual offer up near the HMAS memorial)
- Few current offers are well-positioned to take advantage of views/ locations
- Lack of availability of local seafood (lobster) universally criticised by stakeholders
- Limited and inflexible opening hours criticised by Stakeholders

Some experiences in the History category require greater elaboration:

- Interpretive signage is better than nothing, but is hardly an immersive experience
- Travelling out to a landmark, walking around it and reading a sign is unlikely to thrill

Region-specific events have gained little traction so far.

Signage and infrastructure raised as a concern by stakeholders:

- Entrance to the town felt to be unappealing and drawing tourists in
- Signage not felt to be welcoming
- Signage also not functional (e.g. "no trailers in this area" signs not present until after entering the area

Lack of township activation:

- Town felt to be “dull” and lacking in vibrancy by stakeholders and consumers
- Much of the town still does not engage with the coastline and is felt to face inward, rather than out to the ocean
- Stakeholders perceive a lack of optimism in locals
- Limited opening hours for retail and culinary further underline the lack of vibrancy and undercut Geraldton's position as a regional hub with good facilities and services

Opportunities

Development of the Abrolhos Islands: exclusivity of accommodation on the islands could attract a different and more lucrative clientele

Events

- “Imported” events (One Night Stand, Fringe) with built-in audiences
- Local events that leverage stronger asset categories (principally *History*, supported by *Nature & Natural Heritage*)

Leverage technology to create more immersive experiences:

- E.g. Use of tablets to create “windows into history”, as in the ANZAC Centre in Albany
- Apps with interactivity/ audio tours/ high-production storytelling

Make better use of local produce, especially seafood, particularly lobster.

Development and/or promotion of local markets to increase appeal and uniqueness of retail offer.

Improvement of signage in terms of attractiveness, functionality and location.

Development/ promotion of science/ educational tourism:

- Astronomy (square km array)
- Batavia Institute
- Conferences
- Museum expansion/ development

Establishment of regional cooperation to leverage regional assets:

- E.g. Kalbarri Skywalk, Wildflower Way
- Regional itineraries
- Positioning Geraldton as the accommodation hub
- Incorporating Geraldton-specific as well as regional experiences
- The same itineraries to be communicated by all relevant places/ bodies/ businesses

Threats

Geraldton’s current reputation as a working town with an association with social issues is a barrier to re-positioning it as a regional tourism hub.

(Re)development/ improvements to towns further north could undermine Geraldton’s position as most likely regional hub.

Current opening hours could discourage visitation from cruise market and ultimately encourage companies to stop elsewhere.

Appendix 4: Further Detail on Selected Potential Development Projects

Concept 1: Rock Lobster Retail

Create a “Lobster Shack”-style focal point for seafood tourism and retailing in the Fishing Boat Harbour. For example, a market/food-hall style environment where multiple retailers can have a presence in one place, integrated into the existing Brolos/Geraldton Fisherman’s Co-Operative live lobster tours. Consider showcasing other local/regional produce. Combining or co-locating with a heritage experience may further increase the appeal.

This concept is predicated on domestic availability and pricing issues being addressed. The Lobster Shack in Cervantes may be a useful case study, however that operator receives captive traffic from bus tours to the Pinnacles. The concept could easily be extended to showcase other local and regional produce. Importantly, the concept has the capacity to stimulate the overnight visitor market, with inbound operators likely to be interested in group bookings, especially for the Asian market.

Concept 2: History and Heritage Activation

This plan recommends development of a planned approach to activating greater Geraldton’s unique heritage and maritime history. While a museum redevelopment has been discussed for some time, there are a range of other opportunities including interactive/digital interpretation.

History and heritage the only category that of experiences that is relatively unique to Geraldton, and genuinely available within Geraldton itself (ie not just accessed via Geraldton, but present within the City).

The 2016 tourism asset review found sufficient product of sufficient quality for activation in this area to be delivered to expectations. It identified 40 historical experiences, including memorials, museums, historical/ heritage sites and landmarks, and Interpretive signage tours. Feedback from stakeholders suggests areas for improvement in the history category would be to make current experiences more immersive and involving for visitors (eg going beyond interpretive signs by incorporating technology and better storytelling) or by introducing other elements such as a culinary experience.

The 2016 TNS project recommended developing weaker history experiences through elaboration (eg technology to engage and recreate, with better storytelling – for example how tablets are used to create “windows into history” by the ANZAC Centre in Albany, or interactive apps or audio tours). A bolder example would be the ‘Blood on the Southern Cross’ sound and light show in Sovereign Hill, Ballarat.

While history is the most unique and ‘deliverable’ of Geraldton’s attractions, currently only 15% of visitors are motivated in part to visit Geraldton by this, – and it is a trigger to visit for just 6% of visitors. That said, 17% of non-visitors cite history/historical landmarks as their most preferred future visitor experience.