

GERALDTON-GREENOUGH TOURISM STRATEGY:

**A 10 year vision for tourism development in
Geraldton-Greenough and surrounds**

Commissioned by
Mid West Development Commission

Planning for People Pty. Ltd.

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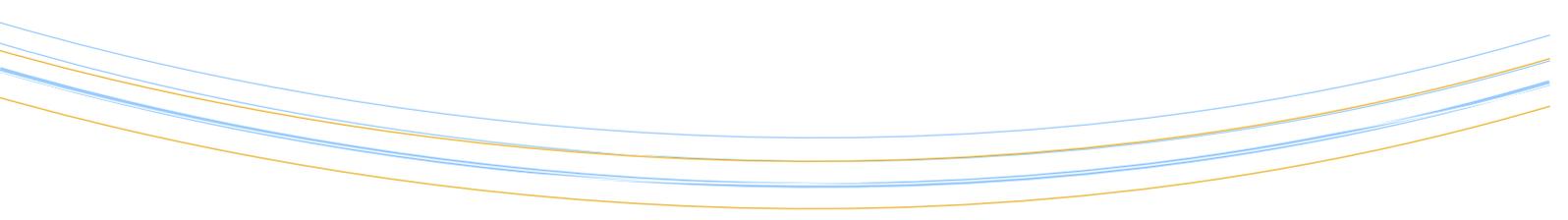
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EXECUTIVE SUMMARY

Background

Geraldton-Greenough currently offers a range of experiences in areas such as marine based activities, heritage, environment, agriculture, Aboriginal and the arts. However, for a number of reasons these assets have never transcended into the development of the city as a mono tourism destination. Rather it has been considered predominantly as a stepping-stone to other destinations such as Kalbarri, Shark Bay and Ningaloo

The strategy aims to address the following significant objective:

- ✚ To determine a realistic vision for Geraldton-Greenough for the foreseeable future including the key experiences to be offered.

The strategy has been developed with the input of stakeholders through workshops and Focus Groups as well as individual discussions.

The major strengths, weaknesses, opportunities and threats associated with the current tourism offer of Geraldton-Greenough are as follows:

Strengths	Opportunities
Foreshore redevelopment Coastal environment Farmland environment WA Museum Heritage including Batavia and HMAS Sydney II Memorial Arolhos Islands	Arolhos Islands Water sports Conferences and conventions Batavia story Nature based experiences Adventure based experiences Food and wine Indian Ocean Drive
Weaknesses	Threats
Accommodation Geraldton's negative perception Limited transport options to and within Geraldton-Greenough Tourism sites not well connected	Failing to get additional accommodation Failing to attract investment No strategic tourism planning Tourism management and coordination

Tourism Vision

The Vision proposed for tourism is as follows:

- ✚ Geraldton will be recognised as a vibrant and welcoming coastal destination offering an enviable outdoor lifestyle and unique marine, sports, heritage and cultural experiences.

The vision will be achieved through:

- ✚ The development of a range of tourism experiences focused on the nature based and heritage assets and stories of the Abrolhos Islands;
- ✚ The sustainable management of the beautiful beaches, natural areas and foreshore to support recreation, adventure and a vibrant community and tourism precinct;
- ✚ The engagement of the local community in tourism as a potential significant contributor to the local and regional economy;
- ✚ Ongoing planning towards a broader range and capacity of accommodation, an iconic attraction that reflects a Geraldton brand, and packaging of tourism experiences to appropriate markets;
- ✚ A marketing strategy that promotes Geraldton for its tourism strengths, links in with Australia's Coral Coast marketing and aims to maintain and expand the existing tourism market, encourage people to stop over and return.

Target markets

The Coral Coast strategy targets the following markets:

- ✚ Outdoor adventurers
- ✚ Relaxers
- ✚ Wildflower enthusiasts
- ✚ Caravan and campers

The Better Business Blitz study considered there to be three main groups that could be tapped for Geraldton-Greenough tourism.

- ✚ Stopover travellers
- ✚ By-passers
- ✚ Holiday and business destination visitors

This strategy identifies improvements that if implemented can assist in broadening the market appeal of Geraldton-Greenough to also encourage

- ✚ Conference and convention market
- ✚ Stopover travellers
- ✚ By-passers
- ✚ Holiday and business destination visitors

- ✚ Weekend and holiday visitors from Perth
- ✚ Cruise ships

Meeting market needs

To meet the needs of the proposed markets, gaps in the current tourism product need to be addressed. These include:

Accommodation

A *full range of accommodation* is required including caravan parks, self contained accommodation and 3-5 star hotels/motels/resorts.

A unique *5 star eco style resort* in an appropriate location that is linked to the vision for Geraldton needs to be considered, as does adequate accommodation suited to the conference market.

Amenities

The foreshore re-development will considerably improve the amenity of the town but will need to be brought to life with *food/wine and nightlife* suited to a range of markets.

Opening hours of restaurants and attractions will need to reflect demand and high levels of *customer service* will need to be provided.

Information and signage needs to be contemporary, of a high standard and pre trip information available on the internet. Signage suited to capturing by passer and stopover markets will need to be appropriately sited and attractive.

Facilities suited to visitors to the *Abrolhos Islands* will be required including toilets, shelter, landing areas etc.

Visitors that have the potential to be high yield need a **high standard of service** if they are to enjoy their experience, come back or talk to others about their visit. If not, they will talk badly about a place. This means that the customer service, the quality of food, the availability of meals, the accommodation must be of a high standard, friendly and reliable and there must be enough for them to do.

Attractions

The identification of a suite of significant attractions for Geraldton-Greenough needs to *reflect the tourism vision* focused on the nature based and heritage assets and stories of the Abrolhos Islands.

A *range of experiences* is required that offer the opportunity for different market groups to engage with the tourism assets of the region.

Experiences need to be suited to short stay and overnight visitors, conference groups on half and one day field visits, as well as extended interactive experiences

The experiences need to be able to be *packaged* to meet the needs of different market groups. For example the full range of activities on the Abrolhos Islands should be promoted and managed through one tourism portal. The activities themselves should not duplicate other experiences and wherever possible compliment other experiences.

Suitable *facilities and services* to support the experiences need to be planned such as day use infrastructure on Abrolhos Islands, signage, transport options between experiences.

Access

The current *air services* are suited to the market but with growth may need to be expanded.

The completion of the *Indian Ocean Drive* will improve the journey for travellers to Geraldton and is likely to increase the attraction of Geraldton as a stop over destination due to the travel time that will result from the Indian Ocean Drive experience.

Within Geraldton-Greenough access is limited for people without cars (such as conference market) by *poor taxi service* and lack of other *public transport*.

Activities

The foreshore and beach area offer potential for *a range of activities* suited to different markets.

The walking and cycling tracks have the potential to link different areas of the town and water based visitor nodes.

Opportunities for visitors to participate in water based recreational activities could be enhanced by location and or promotion closer to town such as within the redeveloped foreshore precinct.



Current Visitor Centre in Bill Sewell Complex

Core tourism experiences

In considering the needs of the target markets, there are two components to the product offer.

Core product – the fundamental experiences that are to be used to attract visitors to Geraldton-Greenough and that have the potential to offer a competitive advantage and generate high levels of expenditure. These are products for which visitors are prepared to pay.

The proposed core product is

(i) *the Abrolhos Islands* with broader range of experiences associated with them than is presently available such as unique accommodation, infrastructure suited to day and overnight visitors, and a range of boat based experiences and.

(ii) the development of an iconic Batavia based day/night experience linked to the foreshore that is of a high calibre and will attract people to come or to stay in Geraldton.

Secondary or supplementary product – is important in adding value to the visitor experience and variation in what people can do, but will not be a primary draw card to Geraldton-Greenough and may be offered in other destinations.

Secondary product proposed to create an exciting destination includes:

- a. Adventure and water sports;
- b. Heritage and culture including the Museum, the HMAS Sydney II memorial, the Bill Sewell complex, Geraldton Regional Art Gallery and potentially exhibits in the Visitor Centre;
- c. Greenough Flats - brought to life with a range of uses;
- d. Aboriginal art, stories and culture;
- e. The Geraldton Port including the lobster factory and working fishing boats;
- f. Festivals and events;
- g. Self guided driving;
- h. Guided tours featuring the unique aspects of the region; and
- i. Local produce.

Short term implementation priorities

High priority actions proposed to be implemented in the short term include:

1. Establishment of a skills based Tourism Advisory Group (GGTAG) to work with City of Geraldton-Greenough and Mid West Development Commission in providing support in the implementation of this plan.
2. Engage suitable expertise to work with the tourism industry and other stakeholders to develop a Brand Strategy.

3. Initiate the first annual tourism conference for Geraldton-Greenough to seek commitment to this plan.
4. Initiate discussions between Fisheries, the Abrolhos Island Management Committee and tourism operators in relation to strategic and sustainable tourism development of the Abrolhos Islands.
5. Call for public expressions of interest or design competition to investigate an innovative, exciting and new concept for a day/night experience that could be delivered by private or public sector.
6. Develop a master plan for the Bill Sewell complex to identify future uses and linkages between the buildings.
7. Review the options for the location of a new and vibrant Visitor Centre offering a broad range of relevant interactive experiences including Aboriginal and marine interpretation.
8. Develop gateway orientation points for Geraldton-Greenough located, planned and designed so as to encourage passers by to stop or look
9. Complete the foreshore re-development project.
10. Extend foreshore planning and development to create quality recreational settings at other visitor nodes including Point Moore and the Surf Club precincts.
11. Identify opportunities close to visitor areas for establishing and signposting car parks and facilities for large vehicles and trailers.
12. Pursue investment to develop a centre and/or facilities suited to major conferences.
13. Develop and promote conference packages initially aimed at small conferences consistent with available venues and accommodation.
14. Leverage off the HMAS Sydney II exhibitions developing at WA Museum and planned development of the Fifth Element at the HMAS Sydney II National Memorial.
15. Introduce a series of famils for the local community to gain greater understanding and commitment to the tourism opportunities offered by Geraldton-Greenough.
16. Pursue investment in additional accommodation to match market needs including 4-5 star and self contained apartments.
17. Expedite planning permission and necessary approvals processes and support and encourage the continued development of accommodation including development proposed for marina and renovations of other venues.

1. INTRODUCTION

1.1 Background and purpose of strategy

The City of Geraldton-Greenough is situated on the Western Australian (WA) coast about 420 kms north of Perth via the Brand Highway (Map 1). It has a Mediterranean climate with hot, dry summers and mild winters. Temperatures are less extreme than the arid inland areas.

The City covers an area of 1,776 square kilometres, incorporating the urban area of Geraldton and townships and rural areas previously part of the Shire of Greenough, which amalgamated with Geraldton in mid-2007.

Geraldton-Greenough currently offers a range of experiences in areas such as marine based activities, heritage, environment, agriculture, Aboriginal and art. However, for a number of reasons these assets have never transcended into the development of the city as a mono tourism destination. Rather it has been considered predominantly as a stepping-stone to other destinations such as Kalbarri, Shark Bay and Ningaloo

The recent amalgamation of two local government authorities to form the City of Geraldton-Greenough and continuing progress on major infrastructure projects that may offer opportunity for invigorating local tourism (eg the foreshore redevelopment, CBD revitalisation and Batavia Coast Marina) are prompts that lead to this project to evaluate the capacity for tourism to deliver increased economic and social benefits to the city. It is also expected that the completion of Indian Ocean Drive (projected for 2011) will bring increased tourist visitation to the city.

The Mid West Development Commission (the Commission) is one of nine regional development commissions established by the State Government to facilitate and co-ordinate economic development in non-metropolitan areas of Western Australia. The Commission was established under the Regional Development Commissions Act (1993). The Commission's role is to provide the best possible quality of life for people in the Mid West region by developing the region's economic and social potential.

The need for a Geraldton-Greenough Tourism Strategy (the strategy) has been identified through the Commission's work and contact with various stakeholders.

The strategy aims to address the following significant objective:

To determine a realistic vision for Geraldton-Greenough for the foreseeable future including the key experiences to be offered.

and to include:

- a. A brief review of relevant research to highlight key issues and opportunities;
- b. Identification of enhancements or additions to the tourism products available in the city;
- c. The types of built attractions that will keep visitors in Geraldton longer and / or stimulate potential source markets;

- d. Consideration of the potential for business tourism growth in the city (eg conferences, expos etc);
- e. The types of messages that need to be delivered into the marketplace to stimulate tourist visitation to Geraldton or to encourage visitors to stay longer;
- f. a prioritised list of recommendations detailing what needs to happen for Geraldton-Greenough to realise its tourism potential, eg development of attractions, accommodation etc.
- g. Identification of actions, lead agencies and timeframes for the achievement of goals and strategies.

1.2 Process of developing the strategy

The strategy has involved a series of steps:

Background literature review

A range of documents have guided the research for the strategy. These have provided context, market data and information. They are reviewed in sections 2 and 3.

Field assessment

The project team has visited the area and explored the tourism experiences and services on offer. We have also researched extensively through the internet and discussions with stakeholders the strengths, weaknesses, opportunities and threats associated with the current tourism offer.

Workshops

Two workshops were held during October 2008 with a range of stakeholders. These meetings gained input in relation to the community vision for tourism and what people saw as the main opportunities for tourism as well as the most significant barriers to progressing.

Reference Group

A Reference Group of representatives from stakeholder groups has been engaged in the strategy development. The stakeholders represented are Mid West Development Commission, Tourism Western Australia, City of Geraldton-Greenough, Geraldton Regional Tourism Association, Geraldton Visitor Centre, Mid West Chamber of Commerce and Industry, Mid West Gascoyne Area Consultative Committee and Australia's Coral Coast.

As well as meeting with the Reference Group, a separate Focus Group was held with them to input further detail and clarification on specific issues.

Focus Groups

Following the initial stages of the work and assessment of workshop outcomes, two Focus Groups were held with a cross section of stakeholders. These further explored the vision for tourism and the potential for development of specific experiences to grow tourism for Geraldton-Greenough.

1.3 Description of Geraldton-Greenough

Geraldton-Greenough is the commercial, administrative and service centre of WA's Mid West Region. The City's population of 35,727 comprises approximately 65% of the regional population. Geraldton provides major port facilities and infrastructure for the region's fast growing mining and resource industries, and also for agricultural and fishing industries which make a significant contribution to the regional and WA economy. Tourism and manufacturing also play an important role in the regional economy. In 2004/05, overnight visitors were estimated to have spent \$202 million in the region (MWDC, 2008)¹.

The City has a range of health, community and educational services, the latter including a Universities Centre and TAFE. Several major industrial, infrastructure, commercial and residential developments are also underway or proposed within the City and nearby areas – including port and industrial facilities at Oakajee, 20 kms north of Geraldton; freight rail corridors from mining operations to Oakajee; a marine services and heavy boat lifting facility and port upgrades at Geraldton; a major radio telescope proposal (the Australian Square Kilometre Array Pathfinder); and marina, foreshore and CBD developments incorporating commercial, accommodation, convention and community facilities.

Geraldton-Greenough is connected to Perth, the Mid-West Region and the north of WA by sealed roads. Travel time from Perth is 4 to 5 hours by motor vehicle and 5 to 6 hours by bus. Bus services also connect Geraldton to other coastal centres and to Mullewa and Northam.

Currently (October 2008) Skywest Airlines operates approximately 40 passenger flights each way between Geraldton and Perth each week, in 46-seat Fokker F50 turboprop aircraft (Skywest Airlines, 2008). Skywest passenger services also operate from Geraldton to other tourism destinations such as Monkey Mia, Carnarvon and Exmouth. Fixed wing and helicopter charter services are available at Geraldton Airport.

1. Reference list at conclusion of document.

2. PLANNING CONTEXT

2.1 City and regional planning and development

2.1.1 City of Geraldton-Greenough

The Geraldton-Greenough Council is the local government authority for the City. In its new strategic plan, *Plan for the Future 2008-2013* (CGG, 2008a), the Council seeks to take advantage of recent economic growth and infrastructure developments to improve the city's economy, environmental quality and social infrastructure. Strategies with potential impacts on tourism include improvements in the Council's tourism services; land use, transport and infrastructure improvements; and cultural and community development initiatives.

The Council has adopted a strategic vision of Geraldton-Greenough as achieving a population of 80,000 to 100,000 people by 2020, when it would be a "Smart City which has a prosperous, sustainable and creative community" and "will utilise the wealth of natural resources to become a centre of global significance in the new economy" (CGG, 2008b).

2.1.2 Mid West Development Commission (MWDC)

The MWDC is a State Government statutory authority (one of 9 regional development commissions established in WA) which has the role of encouraging and assisting development of the region's economic and social potential. It does this in various ways, including through provision of funding, advice and assistance; project management; and promotion and advocacy of the region.

2.2 Infrastructure planning and development

There are several infrastructure and other developments underway in Geraldton-Greenough and surrounding areas which are relevant to potential tourism opportunities. Studies have also been conducted on future airport and accommodation needs.

2.2.1 Geraldton waterfront, foreshore and CBD developments

Ongoing developments on the foreshore and CBD over the next 5 years are intended to result in a more attractive foreshore area with increased public and civic amenities; provision for commercial, restaurant, tourist accommodation and residential development, and for community events. Relocation of the Geraldton Visitors Centre to this area has been proposed. A proposal exists for a civic and cultural precinct that would include key administrative services, an Aboriginal arts and cultural centre,

and a Convention Centre although this is still in planning stages and funding is not assured.

Further development of the Batavia Coast Marina (stage 1 of which has been completed and includes the new WA Museum Geraldton and a timber boardwalk enabling pedestrian access) is planned to include increased retail, commercial, tourism accommodation and residential uses, and provision for outdoor dining and other activities along the water's edge.



Foreshore redevelopment



Foreshore playground

2.2.2 Transport and access

Transport access is an important factor for tourism in Geraldton-Greenough, due to the City's distance from Perth and the long travel distances in WA in general.

Geraldton Airport

It is estimated that about 10% of overnight visitors to Geraldton travel by air (TWA, 2008b).

The Geraldton airport is owned by the City of Geraldton-Greenough. The main runway and passenger terminal were upgraded between 1999 and 2001 and are able to cater for the current level of passenger demand. Regular Public Transport (RPT) passenger movements in and out of Geraldton Airport have increased by an annual average of 7% in recent years, and growth of between 2% and 8% is expected to continue for the next few years (Forte Airport Management, 2007). In 2006-07, 90,535 RPT passengers used the airport.

The airport site has the capacity to accommodate upgrades (such as runway extension) to cater for jet aircraft larger than B737-800 in size. A planning framework for future upgrades is contained in the Geraldton Airport Masterplan which was prepared in 2007 (Forte Airport Management, 2007). The City of Geraldton-Greenough is also acquiring land in the airport buffer zone to safeguard the airport's future functionality and proposes the development of an Airport Technology Park (CGG, 2008b).

A State Government review of intrastate air services is being conducted in 2008 to assess the supply and demand for air services and the adequacy of the current regulatory model which is designed to ensure air services to regional areas, including Geraldton (DPI, 2008). This may have an impact on air services to Geraldton.

Indian Ocean Drive

The completion of the final stage of Indian Ocean Drive (linking Lancelin and Cervantes) is expected in mid 2011. This road will provide an alternative route to Geraldton more suited for tourist experiences. The Indian Ocean Drive may encourage tourists from Perth to stop overnight at a number of small townships en route to Geraldton and beyond. If travellers are encouraged through the experiences on offer to stop at a few places on the way, they are more likely to arrive in Geraldton at a time suited to an overnight stay.

Geraldton Bus Service review

The City of Geraldton-Greenough has mooted the conduct of a feasibility study into the upgrading of the Geraldton Bus Service, including links between the CBD and key tourism points (CGG, 2008b).

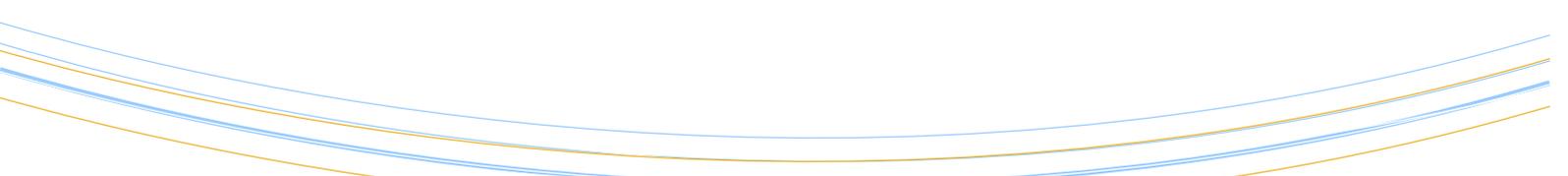
2.2.3 Accommodation

Geraldton-Greenough has been experiencing accommodation shortages, especially mid to higher level rooms, and decreasing room supply. There is one major accommodation complex under construction in Geraldton-Greenough and several facilities planned for completion in the next few years (see Appendix A).

In August 2008, Jones Lang LaSalle Hotels (JLLH) completed a study into the demand and supply for tourism and business accommodation in Geraldton-Greenough (JLLH, 2008). The study found that up to 70% of demand for rooms came from contracted workers and corporate business visitors; independent holiday tourists generated 20% of the accommodation demand; and tours and coaches generated about 10% of accommodation demand in the wildflower season.

In the future, on the assumption that current visitation trends, the resources boom and planned infrastructure projects (such as Oakajee Port) continue, the JLLH study found that:

- ✚ a shortage of caravan park sites and onsite accommodation is likely to occur (partly due to contract worker demand, assuming it is not met by other accommodation developments);
- ✚ supply of hotel, motel and serviced apartment accommodation (in establishments over 10 rooms) is likely to be adequate in the short term (2009-2011) and short to



medium term (2012-2015), assuming that new facilities planned for those periods are opened;

- ✚ 300 additional hotel/motel/serviced apartment rooms are likely to be required in the medium term (2016-2020) – requiring development of approximately 1.7 to 2.5 hectares of additional land (assuming a density of 120 to 180 rooms per hectare);
- ✚ a further 386 hotel/motel/serviced apartment rooms are likely to be required in the long term (2021-2028) – requiring the development of approximately 2.1 to 3.2 hectares of additional land.

JLLH recommended that the vacant Public Transport Authority site near the town centre and the Batavia Coast Marina Stage 2 site be considered as sites for construction of the accommodation required in the medium and long term respectively. These sites are located close to tourism attractions and facilities and are in the locations favoured by visitors (the town centre, on the beach or with ocean views).

3. TOURISM CONTEXT

3.1 Current tourism planning and management

Tourism planning and management in Geraldton-Greenough occurs within the context of the strategic direction, destination development strategies and assistance provided by Tourism WA (TWA) and the marketing activities undertaken by Australia's Coral Coast - Geraldton-Greenough is a part of the Coral Coast region. Tourism management has traditionally been undertaken by the Geraldton Visitor Centre and the Geraldton Regional Tourism Association. Strategic tourism planning was undertaken by the Geraldton-Greenough Joint Tourism Committee until just prior to the local governments' amalgamation in July 2007 when the committee was disbanded and has not been replaced in any form. TWA, and Australia's Coral Coast (the Regional Tourism Organisation) have provided some support for tourism management and marketing in Geraldton-Greenough.

The Geraldton Regional Tourism Association (GRTA) until very recently was the Board of the Geraldton Visitor Centre. Now that the City of Geraldton-Greenough has assumed responsibility for the management of the renamed City of Geraldton-Greenough Visitor Information Services, it is expected that the Association will continue in some form, which is yet to be determined. GRTA includes representatives of the Mid West Chamber of Commerce and Industry, Council and the tourism industry as well as community members.

3.1.1 Tourism WA (TWA)

TWA is a State Government statutory authority responsible for developing, promoting and protecting WA's iconic tourism experiences. It provides the overall strategic direction for tourism throughout the State, as well as providing assistance, tools and research to industry, local government and other tourism stakeholders for destination development, marketing, investment, product development, information and booking services.

The development of regional tourism is one of 6 major strategic directions in TWA's recent *Strategic Plan 2008 to 2014* (TWA, 2007a) which also includes:

- ✚ improvement of the quality of visitor experiences;
- ✚ increasing the level of visitor expenditure;
- ✚ development of Aboriginal tourism;
- ✚ influencing major infrastructure priorities and attracting private investment; and
- ✚ recognition of tourism and events that enhance WA's lifestyle and support the natural environment.

In relation to regional tourism, TWA aims to encourage both high yield tourism and affordable products for intrastate tourists in regional hubs such as Geraldton. In addition, TWA aims to intervene more actively to assist

tourism development in general, including through formation of partnerships to address gaps in tourism access, accommodation, activities and amenities.

3.1.2 Australia's Coral Coast (ACC)

ACC is the Regional Tourism Organisation (RTO) for the Coral Coast Region, which extends along the coast from Cervantes north to Exmouth and inland to Mullewa. Geraldton-Greenough and the towns of Carnarvon and Jurien are the main urban centres in this tourism region. The Coral Coast Region encompasses several high profile or iconic nature-based destinations and activities - including Nambung National Park (the Pinnacles), Kalbarri National Park, Shark Bay World Heritage Area, Monkey Mia, the Abrolhos Islands, the Ningaloo Reef and spring wildflower tourism.

RTOs are funded by TWA and their Boards are comprised of elected and appointed representatives of local government and tourism operators.

The main role of ACC is to market the Coral Coast region and its destinations, and to work closely with TWA in developing marketing strategies, niche markets, advertising and promotional activities. It also provides a forum for tourism operators to network with other industry stakeholders (ACC, 2007, 2008). As indicated in section 3.2.8, Geraldton's visitation patterns and tourism attractions differ in some respects from those in the Coral Coast's premier destinations.

ACC's vision is for the Coral Coast to be recognised globally as a premier marine and nature based holiday destination. Its strategic objectives, as outlined in its 2008-09 Business Plan, include directing marketing efforts towards achieving increases in arrivals, length of stay, expenditure and visitor dispersal in the region.

3.1.3 City of Geraldton-Greenough and Geraldton Visitor Centre roles

Tourism information, services, development and marketing in Geraldton-Greenough is now (as of 3 November 2008) managed by the City of Geraldton-Greenough. A Coordinator for Tourism and Visitor Information Services (currently being recruited) will be responsible for the day to day running of the City of Geraldton-Greenough Visitor Information Services, for managing its team of 7 staff (2 permanent, 3 trainees, and 2 casual, plus volunteers) and will also take a role in implementing tourism strategies. The Council also employs a Coordinator Marketing and Events and a Public Relations Officer. Both coordinators report to the Manager Economic Development and Marketing in what is a brand new team and a whole new focus area for the City of Geraldton-Greenough.

The City of Geraldton-Greenough Visitor Information Services is situated in the Bill Sewell complex of historic buildings in Chapman Road in central Geraldton and provides visitor information (on site, by telephone and through its website), bus bookings, souvenirs and guided tours. There is a proposal to move the Centre to a proposed Foreshore Multiuse Facility. The option is also being explored for a new purpose built Visitor Centre to be located on the grounds of the Bill Sewell complex.

3.2 Current visitation/tourism characteristics

3.2.1 Attractions and activities

Geraldton-Greenough currently offers a range of tourism attractions featuring the natural environment, Aboriginal and European heritage and cultural features, outdoor and sporting activities, and local product shopping and dining opportunities. Tourism attractions and activities are listed in Appendix B. Major attractions include:

- ✚ the WA Museum Geraldton (including the Shipwreck Gallery featuring the 1629 Batavia wreck and mutiny story);
- ✚ Geraldton Regional Art Gallery;
- ✚ the HMAS Sydney II Memorial;
- ✚ Central Greenough (historic settlement, 20 kms south of Geraldton);
- ✚ world renowned wind and kite surfing;
- ✚ scenic beaches and surfing

Visitor surveys conducted by the Shire of Greenough from 2005 to 2007 indicated that, together with the Geraldton CBD, over 50% of respondents had visited the first three attractions (Clarence, 2007). The authenticity and historic/cultural nature of attractions and the quality of beaches also received favourable comment, though unfavourable comments were made about the lack of variety of attractions and activities.

Geraldton is also a major departure point for the Houtman Abrolhos Islands (60 km offshore), renowned for their rich marine life, crayfishing, black pearls and the Batavia wreck. Transport to the islands is also available from Kalbarri and Dongara, to the north and south of Geraldton respectively.

However, Geraldton-Greenough has not developed as a tourism destination in its own right. Research by TWA has shown that the City is perceived by many holiday-makers and tour operators (including spring wildflower tour operators) as a stopover or stepping-stone on the way to other destinations in the Coral Coast Region (or on longer journeys) and as lacking in unique or iconic attractions (TWA, 2008a). There is a low level of awareness of the visitor opportunities offered and low expectations about experiences.

The potential for iconic Coral Coast destinations to draw visitors is highlighted by the high priority given by Australia's Coral Coast to marketing and development of destinations such as Nambung National Park, the Abrolhos Islands, Shark Bay and the Ningaloo Reef (TWA, 2007c) and the plethora of new accommodation developments planned or underway at Coral Coast locations (TWA, 2007b).

Current proposals for new tourism attractions and activities are listed in Appendix F.



On the Heritage Trail



Old Geraldton Gaol

3.2.2 Visitor numbers and visitor nights

Unless otherwise stated, visitor data in this section is taken from TWA's 2007 fact sheet for Geraldton-Greenough (TWA, 2008b)², which is derived from the National and International Visitor Surveys. This data is presented as annual averages for the 3 years 2005 to 2007.

The City of Geraldton-Greenough has experienced an overall decline in both domestic and international overnight visitor numbers since 1999 (see Table C1 in Appendix C for details).

- ✚ The three-year total annual average visitation was 267,000 in 1999-2001, 262,000 in 2002-2004 and 241,600 in 2005-2007.
- ✚ There were slight increases in both domestic and international visitor numbers in 2007 (total visitors were 223,000) over 2006 (total 214,000), with both years having lower visitation than 2005 (total 259,000). The higher visitor numbers in 2005 were due to higher domestic visitation (JLLH, 2008).

The trend in visitor nights spent in Geraldton-Greenough has been variable between 1999 and 2007 (see Table C1 in Appendix C).

- ✚ Intrastate (WA) visitor nights have declined.
- ✚ Interstate visitor nights fell in 2002-2004 and increased in 2005-2007 to higher levels than 1999-2001.
- ✚ International visitor nights increased overall, but in 2005-2007 declined below 2002-2004 levels.

2. As TWA intends to issue these fact sheets annually, this format was chosen to facilitate comparison with visitation data in future years. The data may underestimate actual visitors and visitor nights due to the number of contract workers in the City and region.

In 2005-2007, intrastate visitors stayed in the City an average of 3 nights, while interstate and international visitors stayed an average of 3.6 and 4.1 nights respectively.

The majority of the City's overnight visitors are intrastate visitors (from WA). Between 2005 and 2007, 73% of overnight visitors were intrastate, 16% came from interstate and 11% came from overseas (see Appendix C).

3.2.3 Visitor characteristics

Geraldton-Greenough receives a relatively high percentage of domestic overnight visitors in the middle to older age groups (see Table C2 in Appendix C). On average in 2005-2007, 37% of domestic overnight visitors were aged between 45 and 64, and 33% between 25 and 44. International visitors tend to be somewhat younger, with 43% in the 24 to 44 age group, and 32% aged between 45 and 64.

In the years 2005 to 2007, there were about 18% more male (59% of total) than female (41% of total) domestic overnight visitors (though this difference may reflect the relatively high number of business visitors). International visitors were more evenly divided – 52% male and 48% female.

3.2.4 Purpose of visit

The majority (87% on average for 2005-2007) of international visitors come to Geraldton-Greenough for holiday/leisure purposes.

While most domestic overnight visitors (39% in 2005-2007) also come for holiday/leisure purposes, this is only slightly more than those whose purpose is to visit friends or relatives (32%). In 2005-2007, an average of 19% of domestic overnight visitors were on business (see Table C3 in Appendix C).

3.2.5 Type of accommodation used

Of all domestic overnight visitors to Geraldton-Greenough, most (38%) stay with friends and relatives, with 31% staying in hotels or motels, and 22% in caravan or camping accommodation. The JLLH accommodation study reports that visitor nights spent in caravan/camping parks have grown steadily at an average of 8.6% a year for the 5 years ending in 2007, while visitor nights spent in hotels, motels and guest houses have declined at an average of 5.7% a year.

The accommodation mix is different for domestic holiday visitors, most of whom stay either in hotels or motels (35%) or caravan/camping accommodation (34%) (estimates taken from TWA, 2008a - being annual averages for the 5 year period June 2003 to June 2007). Most international holiday visitors stay in caravan or camping accommodation (43%), while 33% stay in hotels or motels and 16% in backpacker accommodation.



Bill Sewell Complex



Beachside Accommodation

3.2.6 Transport

For domestic visitors, private vehicles (about 73%) are the most popular form of transport to Geraldton-Greenough, with about 10% arriving by air and 6% by bus or coach. No data appears to exist in relation to transport used by international visitors, either for Geraldton-Greenough or Coral Coast. Given high caravan park usage, it might be assumed that hire cars/vans etc form a relatively high proportion of transport.

3.2.7 Domestic day visitors

Geraldton-Greenough received an average of 159,000 domestic day visitors a year between 2005 and 2007, which is an overall increase from 1999-2001. Most day visitors come for holiday/leisure purposes (45%), with 24% visiting friends or relatives and 18% on business. There is a similar age group distribution to overnight domestic visitors.

3.2.8 Comparison with Coral Coast visitation

Geraldton-Greenough's overnight visitation forms about 38% of the total Coral Coast annual average visitation of 637,000 people for the years 2005 to 2007.

Overall visitor numbers to the Coral Coast have also shown a declining trend since 2000 (TWA, 2008c). While varying from year to year, domestic visitation trends have remained flat over this period, while international visitor numbers fell to 2005 and are now increasing. International visitation trends in both Geraldton-Greenough and the Coral Coast do not show the level of growth characterising international visitation to WA in general, where growth is exceeding the national average (TWA, 2008d).

Geraldton-Greenough has a different pattern of domestic visitation than the Coral Coast in general, receiving comparatively fewer holiday visitors (39% for Geraldton-Greenough compared with 57% for the Coral Coast) and more people visiting friends and relatives or on business (see Table C3 in

Appendix C). In both Geraldton-Greenough and the Coral Coast, the vast majority of international visitors are holiday visitors.

Caravan and camping is the most popular form of accommodation for Coral Coast visitors, being 34% for domestic visitors and 39% for international visitors in 2007 (TWA, 2008c).

It is difficult to compare ages of visitors between Geraldton-Greenough and the Coral Coast because TWA has used different age classes for each.

3.3 Visitor satisfaction

Four recent person-to-person surveys of 100 people each, conducted by the Shire of Greenough from 2005 to 2007, showed a high level of overall visitor satisfaction (79% of respondents) with experiences in Geraldton (Clarence, 2007). High levels of satisfaction were also expressed with accommodation (81%), attractions (84%) and infrastructure (82%).

Positive comments about Geraldton expressed in these surveys tended to relate to the friendliness of local people, the weather, beaches, value for money and lack of crowds. Negative comments were made about perceived lack of facilities, amenities and attraction; road works and development activities; the presence of intoxicated people; and poor standard and maintenance of accommodation (see Appendix D).

In interpreting the high visitor satisfaction levels expressed in these surveys, account should be taken of TWA's Better Business Blitz research into Geraldton-Greenough visitation in October/November 2007 (TWA, 2008a). This involved in-depth interviews with over 60 people – holiday visitors, business visitors, tour operators and non-visitors. TWA considered that visitors to Geraldton-Greenough tended to have "neutral" views about their experiences because of their low expectation of the City and its attractions and activities.

3.4 Current visitor markets

3.4.1 Source of visitors

The majority of domestic visitors to Geraldton-Greenough in 2007 came from Perth (54.6%), followed by other parts of WA (26.9%), Victoria (8.8%), Queensland (4.1%), NSW (2.3%), and other interstate locations (3.3%).

The most popular source countries for international visitors in 2007 were the UK (18.6%), Germany (15.9%), New Zealand (7.4%) and Japan (5.2%). Other European countries supplied 28.7% of international visitors.

Geraldton-Greenough's main international markets are similar to those for the Coral Coast overall, where the majority of international visitors are from the UK and European countries (especially Germany) and New Zealand. Australia's Coral Coast targets these markets and also proposes to target the Singapore and Malaysian markets as they comprise the second highest

international arrivals into WA (though they do not currently provide high numbers of visitors to the region).

3.4.2 Market yield

Although an assessment of comparative numbers is not given, TWA's Better Business Blitz research considers that most holiday visitors to Geraldton-Greenough are low-yield budget travellers and that high-yield visitors form a smaller part of the market. As a possible indication, it is noted that significant proportions of both domestic and international holiday visitors stay in caravan or camping accommodation.

The Better Business Blitz research indicates that the business visitor market is diverse, divided between budget-conscious "blue collar" visitors and "white collar" visitors seeking more upmarket accommodation (about 1 in 5 business visitors). Some scope exists for extending stays where partners accompany business travellers or where visitors on extended journeys seek a weekend location.

3.4.3 Coral Coast markets and marketing

Australia's Coral Coast indicates in its 2008-09 Business Plan that the key market segments for the Coral Coast area are:

- ✚ *Outdoor adventurers* – primarily seeking adventure and new experiences, especially centred around nature based activities
- ✚ *Relaxers* – independent travellers attracted to beaches, warm weather, marine life and activities, natural attractions and events and festivals
- ✚ *Wildflower enthusiasts* – predominantly intrastate females aged 55 and older, but also visitors from interstate and overseas, who travel independently or on group tours
- ✚ *Caravan and campers* – who comprise the most popular accommodation group in the region.

The key visitor experiences to be targeted are marine eco/nature-based tourism (aimed at couples, young families and groups of friends); relaxing water-based holidays (aimed at couples and young families); active water-based holidays (aimed at active 18-39 year old males travelling as part of a couple or a group of friends) and wildflower discoveries (aimed at nature lovers and females aged 55 and over. A 2003 study of WA wildflower tourists characterised them (somewhat wider than the Coral Coast strategy) as mainly older singles or couples with no children living at home, 39% of whom were 55 years and older (WATC, 2003).

Australia's Coral Coast also proposes that, in the longer term, the region target the Meetings, Incentives, Conferences and Events (MICE) niche market, given the high yield of this market, the shortages of rooms in Perth and the number of resorts either under construction or planned in the region.

The Better Business Blitz study considered there to be three main groups that could be tapped for Geraldton-Greenough tourism.

- ✚ *Stopover travellers* – this is the major market and, while low yield and budget conscious, there may be opportunities gained in the provision of affordable accommodation and attractions and improved facilities and amenities.
- ✚ *By-passers* – This is an untapped market, which might be encouraged to come into Geraldton with improved information and signage (especially given that Geraldton is the only Coral Coast town people have to drive through).
- ✚ *Holiday and business destination visitors* – This is a small market with a demand for better accommodation (especially 4 to 5 star) and higher service standards.

3.4.4 Caravan and camping markets

Specific data was not available on the nature of the caravan and camping markets in Geraldton-Greenough. A 2006 study of the WA caravan park industry found that caravan park users in WA could be categorised as either travellers or holidaymakers (TWA & TRA, 2007).

Travellers stayed in a caravan park for accommodation while on a road trip and could be further characterised as *Grey Nomads* (over 55 years old and typically on extended trips); *International Travellers* (such as touring with rented campervans); and *Freedom Seekers* (younger couples or friends from interstate, typically on trips less than 3 months).

Holidaymakers regarded the caravan park as their holiday destination and could be classified as *Families* (young, budget conscious families from interstate); *Winter Drifters* (usually retired couples from intrastate); and *Intrastate Holidaymakers* (on short trips from Perth and seeking a cheap, relaxing holiday). More detail on these market segments is provided in Appendix E.

3.4.5 Tour markets

TWA's Better Business Blitz study considered that the current tour market for Geraldton-Greenough was limited (though only 5 tour operators were interviewed). In general, Geraldton-Greenough tends to be a stop-off (eg. for morning tea or lunch) on Coral Coast tours, with operators using well-established accommodation providers in locations such as Kalbarri, Northampton and Monkey Mia. Locations visited in Geraldton-Greenough included the Greenough Wildlife Park and the HMAS Sydney Memorial. There was seen to be little demand for tours to Geraldton-Greenough and extension of tours to incorporate more locations in the City was seen as sensitive to budget issues.

4. GENERAL TRENDS

Planning for tourism in Geraldton-Greenough will need to take account of general tourism trends and be sensitive to potential economic, social and environmental changes which may affect tourist preferences and behaviour. Possible major future issues are outlined below.

4.1 Tourism trends

Domestic tourism markets may become more competitive. Australia has seen a gradual decline in domestic tourism in recent years, due to cheaper overseas travel resulting in more Australians taking overseas holidays and to a tendency among some Australians (especially young adults and families with children) to place a higher priority on spending discretionary income on savings, servicing debt or purchasing consumer items than on travel. (TRA, 2007). Up to 2020, Tourism Research Australia is predicting either a continuing decline in domestic tourism or a slight growth, depending on the success of the tourism industry in developing attractive products (TRA, 2008).

International visitor numbers to Australia have begun to increase again after falls due to the international events of 2001 to 2003. Forecasts are for an average annual growth in international visitors of 4.8% up to 2016 (Tourism Forecasting Committee, 2007). However, due to the long haul nature of much international visitation to Australia, international visitor numbers tend to be affected by "shocks" which might occur due to rising oil prices affecting air travel costs, economic recession and international events which might affect perceptions of security and health risks.

4.2 Aging population and Baby Boomer travel

By 2021, the proportion of Australians over 65 is expected to reach 18% of the population, compared with 13% in 2006 (ABS, 2006). As the large Baby Boomer generation (which is fitter and has more discretionary income than previous generations) reaches late middle age and enters retirement, the proportion of older people travelling is expected to increase. In WA, this may affect the size of the Grey Nomad and Winter Drifter markets which utilise caravan and camping accommodation, as well as the demand for tours and for other accommodation and experiences suited to older tourists.

4.3 Short breaks

There is a trend in Australia towards taking shorter breaks as opposed to long annual holidays. This has emerged as many Australians experience increasing work demands and decreasing work security, and has been facilitated by discounted airfares. The tourism industry is now developing products for the short break market, particularly aimed at people with higher disposable incomes.

4.4 Changing visitor expectations – the Experience Seekers

Significant changes have also been occurring in the expectations of many tourists throughout the world. The gaining of new and diverse experiences has become a significant motivator for many tourists, who are interested in gaining “authentic” experiences through immersion in the character of a destination; gaining new knowledge and understanding of people and places; personal development; and engaging in activities which provide a contrast to their everyday life. There are also growing expectations that facilities and infrastructure will be provided to facilitate such experiences.

It is likely that many visitors (especially international visitors) to the Coral Coast (and potentially to Geraldton) will be such Experience Seekers, with an interest in icon destinations, challenging experiences and quality interpretation.

4.5 Oil prices

With its long distances and high percentage of tourists using private or hire vehicles for transport, WA is vulnerable to impacts on tourism due to rising oil prices.

Increased costs of fuel may influence holiday destination decisions for budget travellers and visitors staying in caravan or camping accommodation – who form relatively high proportions of current Geraldton-Greenough visitation. The 2006 study of the WA caravan industry found that just over half of survey respondents believed their use of caravan parks would change if fuel costs increased. This was particularly the case for people on fixed incomes, such as retirees. Other respondents considered they may adapt their travel plans, such as travelling shorter distances or cutting down the length of trips (TWA & TRA, 2007).

4.6 Economic uncertainty

The October 2008 global economic crisis has highlighted the potential for economic conditions to affect tourism. Reductions in superannuation savings caused by stock market fluctuations may affect Baby Boomers’ retirement travel plans, and in the general population, economic recession may affect the disposable income available for holidays.

4.7 Climate change

The impacts of climate change on tourism are difficult to predict due to the gradual and variable climate impacts being experienced in different areas. Changed visitation patterns may occur because of adverse weather conditions (eg. drought, increased summer temperatures, increased severity of cyclones) and impacts on amenity (eg. water supply).

5. SWOT ANALYSIS OF TOURISM

The major strengths, weaknesses, opportunities and threats associated with the current tourism offer of Geraldton-Greenough Is shown below. The complete SWOT analysis contained in Appendix G.

Strengths	Opportunities
Foreshore redevelopment Coastal environment Farmland environment WA Museum Heritage including Batavia and HMAS Sydney II Memorial Abrolhos Islands	Abrolhos Islands Water sports Conferences and conventions Batavia story Nature based experiences Adventure based experiences Food and wine Indian Ocean Drive
Weaknesses	Threats
Accommodation Geraldton's negative perception Limited transport options to and within Geraldton Tourism sites not well connected	Failing to get additional accommodation Failing to attract investment No strategic tourism planning Tourism management and coordination

6. RECOMMENDED APPROACH FOR THE FUTURE

6.1 Vision for Tourism

Geraldton will be recognised as a vibrant and welcoming coastal destination offering an enviable outdoor lifestyle and unique marine, sports, heritage and cultural experiences.

The vision will be achieved through:

- ✚ The development of a range of tourism experiences focused on the nature based and heritage assets and stories of the Abrolhos Islands
- ✚ The sustainable management of the beautiful beaches, natural areas and foreshore to support recreation, adventure and a vibrant community and tourism precinct
- ✚ The engagement of the local community in tourism as a potential significant contributor to the local and regional economy
- ✚ Ongoing planning towards a broader range and capacity of accommodation, an iconic attraction that reflects a Geraldton brand, and packaging of tourism experiences to appropriate markets.
- ✚ A marketing strategy that promotes Geraldton for its tourism strengths, links in with Australia's Coral Coast marketing and aims to maintain and expand the existing tourism market, encourage people to stop over and return.

6.2 Proposed Tourism Markets

The Coral Coast strategy targets the following markets:

- ✚ Outdoor adventurers
- ✚ Relaxers
- ✚ Wildflower enthusiasts
- ✚ Caravan and campers

The Better Business Blitz study considered there to be three main groups that could be tapped for Geraldton-Greenough tourism.

- ✚ Stopover travellers
- ✚ By-passers
- ✚ Holiday and business destination visitors

This strategy identifies improvements that if implemented can assist in broadening the market appeal of Geraldton-Greenough to also encourage:

- ✚ Conference and convention market
- ✚ Stopover travellers
- ✚ By-passers

- ✚ Holiday and business destination visitors
- ✚ Weekend and holiday visitors from Perth
- ✚ Cruise ships

Some of these groups have the potential to be high yield visitors (particularly the conference and convention markets and, if the right facilities and services are available, weekend and holiday visitors from Perth.)

With an appropriate range of experiences suited to short stay, high yield visitors, the current efforts to attract the cruise market may also prove to be successful.

<i>Market</i>	<i>What they need</i>
Conference and convention market	Easy access and transport Suitable 3-5 star accommodation Conference facilities Range of experiences suited to field trips Food/wine/night life
Stopover travellers	Range of affordable accommodation Attractions and experiences suited to short stay Range of options for meals Attraction through visitor amenities and landscape Information and signage
By-passers	Range of accommodation Attractions and experiences (including iconic product offering) Range of options for food, wine, nightlife Attraction through visitor amenities and landscape Information and signage
Holiday and business destination visitors	Access and transport 3-5 star accommodation Range of attractions and experiences suited to varying length of stay Food/wine/nightlife
Weekend and holiday Visitors from Perth	Broad range of accommodation including self contained apartments Attractions and experiences (including iconic product offering) Range of recreational opportunities Range of options for food/wine/meals
Cruise ships	Attractions and experiences (including iconic product offering) close to town and suited to short stay Range of recreational opportunities Range of options for food/wine/meals Public transport/taxis

6.3 Meeting the needs of current and new markets

To meet the needs of the proposed markets, gaps in the current tourism product need to be addressed. These include:

Accommodation

A **full range of accommodation** is required including caravan parks, self contained accommodation and 3-5 star hotels/motels/resorts.

A unique **5 star eco style resort** in an appropriate location that is linked to the vision for Geraldton needs to be considered, as does adequate accommodation suited to the conference market.

Amenities

The foreshore re-development will considerably improve the amenity of the town but will need to be brought to life with **food/wine and nightlife** suited to a range of markets.

Opening hours of restaurants and attractions will need to reflect demand and high levels of **customer service** will need to be provided.

Information and signage needs to be contemporary, of a high standard and pre trip information available on the internet. Signage suited to capturing by passer and stopover markets will need to be appropriately sited and attractive.

Facilities suited to visitors to the **Abrolhos Islands** will be required including toilets, shelter, landing areas etc.

Visitors that have the potential to be high yield need a **high standard of service** if they are to enjoy their experience, come back or talk to others about their visit. If not, they will talk badly about a place. This means that the customer service, the quality of food, the availability of meals, the accommodation must be of a high standard, friendly and reliable and there must be enough for them to do.

Attractions

The identification of a suite of significant attractions for Geraldton-Greenough needs to **reflect the tourism vision** focused on the nature based and heritage assets and stories of the Abrolhos Islands.

A range of experiences is required that offer the opportunity for different market groups to engage with the tourism assets of the region. (the recommended mix is provided in Tables 1 and 2 in section 6.5).

Experiences need to be suited to short stay and overnight visitors, conference groups on half and one day field visits, as well as extended interactive experiences.

The experiences need to be able to be **packaged** to meet the needs of different market groups. For example the full range of activities on the Arolhos Islands should be promoted and managed through one tourism portal. The activities themselves should not duplicate other experiences and wherever possible compliment other experiences.

Suitable **facilities and services** to support the experiences need to be planned such as day use infrastructure on Arolhos Islands, signage, transport options between experiences.

Access

The current **air services** are suited to the market but with growth may need to be expanded.

The completion of the **Indian Ocean Drive** will improve the journey for travellers to Geraldton and is likely to increase the attraction of Geraldton as a stop over destination due to the travel time that will result from the Indian Ocean Drive experience.

Within Geraldton-Greenough access is limited for people without cars (such as conference market) by **poor taxi service** and lack of other **public transport**.

Activities

The foreshore and beach area offer potential for **a range of activities** suited to different markets.

The walking and cycling tracks have the potential to link different areas of the town and water based visitor nodes.

Opportunities for visitors to participate in water based recreational activities could be enhanced by location and or promotion closer to town such as within the redeveloped foreshore precinct.



Kite surfing

6.4 Overcoming previous poor perceptions

Addressing the gaps identified above has the potential to go a long way towards creating greater opportunities for Geraldton-Greenough. The issues people have had in the past (Visitor Survey, Appendix D) must still also be addressed including:

Access issues: Travel distance; Unsafe/poor roads; development/road works; lack of developed and maintained road verges; poor access/parking for larger vehicles; lack of public transport

Issues of travel distance are reality but with the Indian Ocean Drive, the timing of arrival in Geraldton has the potential to improve. Roadworks, seen as a negative by some, are part of the solution. The strategy proposes improvements to car parking and public transport issues.

Environment and climate: Wind/dust

The promotion of Geraldton-Greenough for its water sports that focus on the wind is important as is recognition of the various strengths of the different seasons.

Perceptions of safety and intoxicated people in public

The reality of this has changed and hence perceptions will be better over time. As Geraldton grows, the overall experience will become one of a vibrant and safe community.

Overall experience: Limited activities; lack of atmosphere; lack of coffee shops/cafes; lack of services/shopping on weekends; facilities and safety at beaches

The strategy provides the approach by which there will be an overall improvement in the experience of Geraldton and where a range of experiences and services will be provided to meet the needs of visitors.

Accommodation: too noisy (due to location); low maintenance standards; uncleanliness; poor quality of buildings/décor.

This issue will improve over time with a broader range and standards of accommodation recommended.

Information: Limited brochures on site; signage.

Strategies to reflect the needs of visitors in terms of information, orientation and way finding are provided.

Facilities: Unclean public toilets; availability of rubbish bins; undeveloped foreshore

Council has re-dressed these issues with the foreshore development making a significant improvement to overall amenity.

6.5 Developing the Tourism Product to match the market

In considering the needs of the target markets, there are two components to the product offer:

Core product – the fundamental experiences that are to be used to attract visitors to Geraldton-Greenough and that have the potential to offer a competitive advantage and generate high levels of expenditure. These are products for which visitors are prepared to pay.

Secondary or supplementary product – is important in adding value to the visitor experience and variation in what people can do, but will not be a primary draw card to Geraldton-Greenough and may be offered in other destinations.

The range of tourism products provided will vary across the year given the seasonal nature of many of the experiences.

Table 1 identifies the current and potential core product and the differentiating attributes to attract target markets.

Table 2 identifies the secondary product and how it adds value to the experience for the visitor.

Table 1 Core product

Core product - current	Differentiating attributes	Opportunities
<p>Abrolhos Islands</p> <ul style="list-style-type: none"> ✚ flights and boat trips ✚ snorkelling ✚ Batavia heritage 	<p>Remote islands, limited numbers, extraordinary heritage</p> <p>Marine biodiversity consistent with Great Barrier Reef</p> <p>Oldest structure built by Europeans in Australia</p>	<p>Infrastructure for day visitors including picnic areas, BBQs, toilets, shade and café</p> <p>Commercial boat options including marine life viewing through snorkelling, diving, glass bottom boats</p> <p>Potential underwater marine / wrecks trail</p>
Core product -potential		<p>Unique water based accommodation on the islands or on boats close to islands</p>
<p>Abrolhos Islands</p> <p>Unique accommodation(eco lodge or luxury shack experience or boat based)</p> <p>Packaged day visits</p> <ul style="list-style-type: none"> ✚ glass bottom boat ✚ Diving & snorkelling – underwater caves / coral / shipwrecks ✚ Whale watching 	<p>Accessible wildlife experiences</p> <p>Staying on most southern coral atoll and experiencing unique natural and cultural heritage</p> <p>Feeling like a ship wreck survivor</p> <p>Exploring and stimulated by remoteness</p> <p>Relax whilst on a guided boat trip</p>	<p>Guided or self guided walk between sites on islands</p> <p>Interactive interpretation of the Batavia story and ruins at Beacon Island</p> <p>Shore based attractions for budget travellers eg ticketed film screenings that bring the Islands to life</p>
<p>Iconic Batavia based day/night experience linked to foreshore precinct</p>	<p>Specific and unique interactive visitor attraction focused on the Batavia history suited to all visitors</p> <p>Be surprised and delighted by this piece of history brought to life in a unique, tangible and unforgettable experience</p> <p>Combine this unique experience with the vibrant café life and pedestrian and family precinct of the waterfront</p>	<p>Potential light and sound show</p> <p>Theatre re enactment of Batavia story similar to Sarah Island play in Strahan Tasmania</p> <p>Other day/night concept to be explored through competition or expression of interest process</p>

Table 2 Secondary Product

Secondary product – current and potential	Differentiating attributes	Opportunities
<p>Adventure / water sports</p> <ul style="list-style-type: none"> ✚ Kite and wind surfing ✚ Marina based sailing 	<p>One of the best known areas for kite and wind surfing world-wide</p> <p>Being challenged and stimulated by new experiences</p> <p>Sense of achievement and adrenalin</p> <p>A stopping place for passing craft</p>	<p>Enhancement of commercial opportunities for adventure sports</p> <p>Promotion of adventure sport precinct</p> <p>Watersports events and festivals</p> <p>Further development of Batavia Coast Marina to cater for water based tourism</p>
<p>Heritage and culture</p> <ul style="list-style-type: none"> ✚ Museum of Western Australia ✚ HMAS Sydney II Memorial ✚ Bill Sewell complex ✚ Visitor Centre ✚ Geraldton Regional Art Gallery ✚ Greater Geraldton Themed Interpreted Walk Trails 	<p>Stimulate your knowledge and interest in the region, the state and the Batavia history</p> <p>The National Memorial to the HMAS Sydney II</p> <p>Enjoy a range of interactive experiences in the historic buildings of the Bill Sewell complex</p> <p>Learn about our past and the present through the eyes of local people</p>	<p>Use of innovative technology (pod cast, downloads etc) to create engaging experiences</p> <p>Further develop WA Museum to complement current exhibition capacity and add vibrancy to the Marina</p> <p>Aboriginal and post European cultural components to a vibrant precinct at Bill Sewell</p> <p>Visitor Centre with exciting interactive interpretation relating to local history</p> <p>Visitor Centre co-located as a central part of one of the primary visitor nodes (either Bill Sewell or foreshore or marina)</p>
<p>Greenough Flats</p>	<p>Enjoy a range of interactive experiences and artisans at Greenough Flats throughout the year</p> <p>Appreciate how this area was developed and the lifestyle</p> <p>Get information from this gateway to Geraldton-Greenough</p>	<p>Artists in residence</p> <p>Retail sales of regional arts and crafts</p> <p>Better interpretation of the historical landscape</p> <p>Experiences / events that will bring the area to life on a regular basis</p> <p>Café and other potential experiences suited to short</p>

Secondary product – current and potential	Differentiating attributes	Opportunities
	Leaning Trees	stay visitors Historic accommodation options
Aboriginal art, stories and culture	Strong local Aboriginal arts industry Learn about the local Aboriginal culture from local community members	Capacity building and development of small businesses Focus in Visitor Centre, and in Aboriginal precinct of Bill Sewell Potential for guided experiences in surrounding areas Small but regular with growth over time
Port of Geraldton <ul style="list-style-type: none"> ✚ Working fishing boats. ✚ Live Lobster Factory tours 	Indulge your senses and understand the processing of seafood Meet the local fishermen and watch them go to work Look out and see if you can spot the sea lion colony Wildlife experiences reward the patient visitor	Commercial potential for fishermen taking paying customers subject to OH and S Availability of fresh fish / seafood direct from fishermen Link the sea to the shore Small boat experiences of sea lion colony Future potential for innovative sea lion viewing platform Support tourism activity at the Fisherman’s Harbour
Festivals or events that reflect the special attributes of Geraldton-Greenough <ul style="list-style-type: none"> ✚ Crayfish/Seafood/local produce ✚ Batavia ✚ Wind and water sports 	Enjoy our community and the produce that contributes to our economy	Encourage major events that promote the excellent natural and built assets including the coast/wind and the sporting facilities (eg. golf, bowls) Build on the local produce such as larger festivals similar to the “Blessing of the Fleet”

Secondary product – current and potential	Differentiating attributes	Opportunities
<p>Self drive the hinterland</p> <ul style="list-style-type: none"> ✚ Gascoyne Murchison Outback Pathways ✚ Greenough-Walkaway Cultural Drive 	<p>Experience what the region has to offer in your own time</p> <p>Enjoy a sense of freedom and peace</p> <p>Get off the main roads and explore the hinterland</p> <p>Learn about Aboriginal history</p> <p>Geraldton as one gateway to the outback</p>	<p>Self drive various parts of the region with ipod and blue tooth downloads of local people, music, stories, history etc</p> <p>Potential engagement with local people at key places (eg Aboriginal history)</p> <p>Self drive maps also available</p> <p>Link Gunnado Farm, Ellendale Pool, Wind Farm, Walkaway Museum in a new drive trail</p>
<p>Guided tours</p> <ul style="list-style-type: none"> ✚ 4wheel drive ✚ Boat trips ✚ Aboriginal experiences ✚ Mixed experiences 	<p>Be taken care of and experience the range of attractions in the region</p>	<p>Range of guided experiences suited to half and one days (including stopovers and cruise ships)</p> <p>Scenic flights/access to Abrolhos for short stays</p> <p>Packaged itineraries for visitors</p> <p>Quality tour guide information including use of ipods etc for engaging local voices and stories</p>
<p>Accommodation in special settings</p>	<p>Peaceful places where you are welcomed and have a base to enjoy our asset and activities</p>	<p>B and Bs, farm-stay, Abrolhos, marina apartments, Greenough Flats National Trust properties</p>
<p>Local produce</p>	<p>WA's most northern wineries</p> <p>Olives, lavender, crayfish / seafood, etc</p>	<p>Geraldton Greenough Farmers Market</p> <p>Other opportunities to be identified via annual review</p>

7. STRATEGIES AND RECOMMENDATIONS

Strategies and recommendations are presented under four key result areas

- ✚ Governance
- ✚ Product and experience development
- ✚ Infrastructure
- ✚ Marketing

7.1 Governance

Goal

To create the environment in which all stakeholders are committed to the development, promotion and management of Geraldton-Greenough as a positive and vibrant tourism destination.

Objectives

- ✚ To develop an effective approach to tourism management and ensure effective leadership in working towards the vision for tourism.
- ✚ To engage all stakeholders including the community in the delivery of a high standard tourism experience.

Strategies

1. Develop an appropriate structure for stakeholder engagement in the management of tourism and to ensure valuable advice is provided to those organisations implementing strategies within this plan.
2. To build a strong and resilient tourism industry and a community that is committed to providing a high quality tourism experience and customer service.
3. To provide the resources and commitment necessary to drive and implement the recommendations of this strategy and to monitor and evaluate progress.

Actions

No	Actions	Priority
G1	Call for nominations for a skills-based Tourism Advisory Group (GGTAG) to work with City of Geraldton-Greenough and Mid West Development Commission in providing support in the implementation of this plan. Members to be voluntary and advisory ³ . Focus in initial stages to be advocacy, planning and support for product development with later establishment of a Marketing sub committee as implementation proceeds. GGTAG to be closely aligned with Australia's Coral Coast through membership and linkages in strategy.	H
G2	Review and update the Geraldton-Greenough Tourism Strategy Action Plan on an annual basis	H
G3	Recognise the importance of the plan through consideration of the provision of appropriate staff to coordinate implementation of the plan.	H
G4	Implement a series of famils for tourism industry, Chamber of Commerce, businesses and community to create a greater appreciation of opportunities for visitors.	H
G5	Replace the current Geraldton Regional Tourism Association that advises on the Visitor Centre with professional management by Geraldton-Greenough council staff and the input of the GGTAG	H
G6	Initiate an annual tourism conference that brings together the tourism industry, provides opportunity for networking, and enables presentation of new ideas and learning about trends and initiatives that may impact on the region	H
G7	Seek funding to establish an incentive based Tourism Leadership program designed to help these operators with vision, passion and drive to provide ongoing leadership for the industry in the region	L

3. Skills based Tourism Advisory Groups have worked effectively in other states where the membership is selected on a combination of merit and representation but seeking a mix of skills in business development, financial management entrepreneurs, marketing, visitor experience management, customer service, legal and planning backgrounds as well as ensuring strong knowledge of the region.

7.2 Product and experience development

Goal

To extend the range of tourism experiences associated with Geraldton-Greenough to match the needs of a broader range of market groups

Objectives

- ✚ To encourage and facilitate development of a range of core tourism products to reflect the primary points of difference of the Abrolhos Islands and the Batavia story
- ✚ To encourage development and re-invigoration of a range of secondary tourism experiences to add value and depth to the visitor experience of Geraldton-Greenough

Strategies

1. Plan for growth in tourism expenditure through re-focusing the tourism offer to attract additional markets including high yield visitors.
2. Seek to increase the experiences associated with the Abrolhos Islands as core tourism product for Geraldton-Greenough.
3. Pursue the identification and development of an innovative, exciting and new concept for a day/night experience linked to the Batavia story suited to expanding the tourism offer and attracting travellers to Geraldton-Greenough.
4. Expand the range of accommodation to increase range and capacity to suit different markets and growth in visitor numbers.
5. Encourage further development of the water sports/adventure activities for which the coast is well known by enthusiasts but not visitors.
6. Encourage the development and promotion of a suite of secondary tourism product that is suited to enhancing the tourism experience and providing opportunities for short trips for conference market.
7. Increase the range of commercial guided experiences on offer to visitors.
8. Investigate opportunities for Aboriginal tourism experiences that are relevant and delivered by local Aboriginal community.
9. Enhance the services available to visitor including food, wine and nightlife with reliable and consistent opening hours suited to visitor needs.

Actions

No	Actions	Priority
PE1	Facilitate discussions between Fisheries, the Abrolhos Island Management Advisory Committee and tourism operators in relation to strategic tourism development of the Abrolhos Islands to ensure sustainable management of higher levels of visitation and broader tourism experiences	H
PE2	Encourage tourism operators to broaden the range of experiences on offer for the Abrolhos Islands to include additional boat and land based opportunities	H
PE3	Seek to identify (through public expressions of interest or design competition) an innovative, exciting and new concept for a day/night experience that could be delivered by private or public sector that focuses on the Batavia story and brings it to life for visitors and is of sufficient strength to attract the passer by market (examples include the Sarah Island theatrical story in Strahan, Tasmania or the Sovereign Hill laser and light show, Ballarat, Victoria) – ideally in the foreshore precinct	H
PE4	Encourage investors to consider the development of appropriate accommodation on the Abrolhos Islands to provide a unique and potentially high yield experience	H (underway)
PE5	Support tourism operators to expand and promote opportunities for water based adventure sports through information and business development support and assist in building business viability through expanding the product offered (eg adding cycle hire, sand boarding)	H
PE6	Develop a master plan for the Bill Sewell complex to identify future uses and linkages between the buildings and to optimise the tourism potential of the precinct for interactive visitor experiences and potentially arts, craft, retail	H
PE7	Work with the local Aboriginal community to identify and develop two to three new Aboriginal tourism experiences which provide high quality and consistent tourism experiences	H
PE8	Implement the Greater Geraldton Themed Interpreted Walk Trails	H
PE9	Work with private operators, local artisans, Aboriginal community and the Chamber of Commerce to identify opportunities for use of Central Greenough Historic Settlement to create a vibrant precinct where heritage buildings and the landscape are brought to life on a regular basis (ongoing uses) as well as potential events, with potential for a gateway to the region	M
PE10	Continue to showcase the history of the region through the museum and to establish linkages for visitors through the Batavia story to broader tourism experiences associated with the Abrolhos Islands	M
PE11	Work with the local Aboriginal community to develop a concept for all entry points to Geraldton-Greenough that assists in creating the	M

No	Actions	Priority
	sense of arrival and welcome to their country	
PE12	Encourage expansion of the guided tour product on offer to suit conference market and independent travellers, and consider incorporation of new technology	M
PE13	Encourage the creation of a more consistent visitor experience associated with the Lobster factory that allows for a year round activity and is linked to the working port and purchase/eating local produce	L
PE14	Investigate opportunities for commercial activities associated with the fishing fleet (eg high yield, small number commercial passengers on fishing boats)	L
PE15	Monitor the progress of the Astronomy project as a tourism opportunity of interest to a small niche market	L
PE16	Work with Chamber of Commerce and tourism industry to develop a series of unique events and/or festivals that showcase the Geraldton-Greenough points of difference (eg water/wind sports, Batavia, seafood) and seek sponsorship and support to implement over several years	L
PE17	Consider employment of an events/tourism professional to develop and run events identified in PE16 that will generate more visitors.	L
PE18	Encourage the development of a regional food brand associated with the fishing and crayfish industry and other local produce that can be delivered with consistent standards of high quality preparation and service	L



Central Greenough



Separation Point Beach signage

7.3 Infrastructure needs

Goal

To provide appropriate infrastructure in Geraldton-Greenough to support the range of experiences suited to target markets through identification of infrastructure needs and potential for funding and partnerships.

Objectives

- ✚ To identify and seek funding for the priority infrastructure that will support increased tourism experiences to match the needs of key markets.
- ✚ To provide the base for improved infrastructure to create the optimal visitor experience for visitors to Geraldton-Greenough.

Strategies

1. Plan for the necessary infrastructure to support expanded opportunities for visitor experiences associated with the Abrolhos Islands.
2. Pursue funding or investment to establish a new and innovative day/night experience.
3. Identify the best location for the creation of a vibrant and interactive Visitor Centre which integrates marine and Aboriginal interpretation and is located to maximise the visitor experience.
4. Develop the foreshore as a vibrant community and tourism precinct central to the visitor experience.
5. Implement signage suited to encouraging visitors to come into Geraldton-Greenough and to find their way around.
6. Pursue investment in the necessary range of tourism infrastructure to promote growth in new markets.
7. Facilitate and promote development of more accommodation infrastructure especially for the backpacker and higher yield markets.
8. Develop the Batavia Coast Marina, the Geraldton Airport and new airport link road as more effective and inviting entry points to the city.

Actions

No	Actions	Priority
I1	Facilitate discussions between Fisheries, the Abrolhos Island Management Committee to identify infrastructure needs to support the visitor experience on the islands including landing points, amenities, shelter, BBQs and food	H
I2	Pursue appropriate planning permission and support the private sector in developing accommodation such as a high standard sustainable nature retreat on the Abrolhos Islands	H (underway)
I3	Complete the foreshore re-development project including consideration of water and adventure sport booking agencies and beginners programs in the precinct	H
I4	Develop gateway orientation points for Geraldton-Greenough located, planned and designed so as to encourage passers by to stop or look	H
I5	Pursue investment in additional accommodation to match market needs including 4-5 star and self contained apartments	H (underway)
I6	Expedite planning permission and necessary approvals processes and support and encourage the continued development of accommodation including development proposed for marina and renovations of other venues	H
I7	Develop a strategy for the Conference market which includes development of a centre and/or facilities suited to major conferences	H
I8	Develop and promote the use of Design Guidelines for tourism and property developers to encourage sustainable tourism developments that reflect the landscape	H
I9	Identify opportunities close to visitor areas for establishing and signposting car parks and appropriate facilities for large vehicles and trailers (eg dump points)	H
I10	Review existing intra town transport services (ie taxis and buses) in relation to tourism sites	H
I11	Develop and implement a cruising strategy to ensure sustainable servicing and coordination of visits for this growing market	H
I12	Initiate negotiations with the Geraldton Port Authority to facilitate continued and improved access and mooring of cruise vessels	H
I13	Continue to pursue development of the marina as an attractive and effective entry point to the city, focal point for marine tourism activities and as a place for passing yachts to stop	H
I14	Work with the Chamber of Commerce to encourage the development of a vibrant café, restaurant and pedestrian precinct on the foreshore suited to current and potential markets	M (underway)

No	Actions	Priority
I15	Extend foreshore planning and development to create quality recreational settings suited to water sports, beach activities and day use at other visitor nodes including Point Moore and the Surf Club precincts	M
I16	Once attraction proposed in PE 3 has been identified, seek funding and/or partnerships or investment to deliver this	M
I17	Review the options for the location of a new and vibrant Visitor Centre (potentially incorporating the Marine Discovery Centre concept, see Appendix F) offering a broad range of relevant interactive experiences including Aboriginal and marine interpretation. Priority needs to be given to co-locating in one of the primary visitor precincts (the Bill Sewell complex, the marina or the foreshore area) rather than dispersing tourism services to other locations	M
I18	Continue to develop the cycle-ways and walking tracks along the coast with priority to completing missing links between existing built paths	M
I19	Undertake a signage strategy that focuses on gateway, orientation, way-finding for vehicles and pedestrians and primary tourism sites	M
I20	Undertake and implement a signage strategy for the region that will encourage visitors to stop at Geraldton instead of bypassing, with particular relevance to completion of Indian Ocean Drive	M
I21	Develop two new self drive trails (potentially including the North Road Stock Route Drive Trail) to a high standard including downloadable information, which are well marked and easy to follow and link primary visitor sites that are market ready and reflect the unique aspects of the region	M
I22	Advocate to the State Government for improvements to utilities and services including <ul style="list-style-type: none"> ✚ infrastructure to support tourism development on the Abrolhos Islands ✚ expansion of regional air services to Geraldton 	M
I23	Investigate options for providing facilities for super yachts and luxury cruisers to accommodate this growing market	M
I24	Ensure the Geraldton Airport and new link road to the city centre offer an attractive and effective entry route to the city	M
I25	Support the construction of artificial reefs proposed for Oakajee Port and Geraldton Back Beach	L
I26	Undertake a public art / landscaping strategy for the city particularly with regard to ensuring that entry points and routes are welcoming	L

7.4 Marketing

Goal

To market Geraldton-Greenough to a broader range of tourism markets and increase the number and yield associated with tourism to the region.

Objectives

- ✚ To use appropriate images and brand to reflect the opportunities offered in Geraldton-Greenough to consumers.
- ✚ To develop marketing strategies that ensure visitors expectations are met.

Strategies

1. Develop a Brand Strategy for Geraldton-Greenough as the basis for future marketing.
2. Develop a Marketing Strategy that reflects the proposed changes to target markets.

Actions

No	Actions	Priority
M1	Engage suitable expertise to work with Australia's Coral Coast, the tourism industry and other stakeholders to develop a Brand Strategy for Geraldton-Greenough to provide the basis for future marketing, collateral and experience development	H
M2	Work with Australia's Coral Coast and Tourism WA to develop cooperative marketing strategies that are relevant to the implementation of product development initiatives	H
M3	Work with the Perth Convention Bureau to develop and promote conference packages initially aimed at small conferences consistent with available venues and accommodation as a basis for further developing this market as larger facilities are brought on line	H
M4	Establish, manage and maintain a high standard website that matches the needs of target markets and has the potential to develop as a booking portal as tourism grows to the area	H
M5	Introduce a series of famils for those members of the local community that have any dealings with visitors (garages, shops, accommodation etc) to gain greater understanding and commitment to the tourism opportunities offered by Geraldton-Greenough	H
M6	Implement Aussie Host or similar customer service programs for all people involved in the broader tourism industry including businesses that may have any dealings with visitors.	H

No	Actions	Priority
M7	Work towards better co-ordination between products including cross promotion, booking, and integrated and packaged product development	H
M8	Develop an image library that is suited to expressing the brand for Geraldton-Greenough and to attracting the various market groups	M
M9	Package short break fly/stay products including Abrolhos Island experiences and potentially sporting packages such as golf	M
M10	Leverage off the HMAS Sydney II exhibitions developing at WA Museum and planned development of the Fifth Element at the HMAS Sydney II National Memorial	M
M11	Undertake seasonal promotion for the range of experiences that are on offer capitalising on the opportunity the windy spring/summer period for wind/water sports	M
M12	Facilitate the implementation of a campaign to "Promote Geraldton to Geraldton" to assist in enabling the community to recognise and sell the tourism attributes of the area to friends, family and visitors	M
M13	Work with Tourism WA on continued market research to better understand the needs of different markets and position Geraldton-Greenough to appeal to these markets as well as to benchmark the success of strategies	M
M14	Work with staff in the Visitor Centre to implement and strengthen the use of the Geraldton-Greenough brand (once developed) and to be able to sell the various opportunities on offer across the region	M
M15	Develop a Marketing Strategy that is linked to Australia's Coral Coast and focused on a staged approach to attracting new markets and repeat visits to Geraldton-Greenough and is grounded in a realistic assessment of timeframes for product development and delivery	M
M16	Educate broader community (including the business community) on the positive financial impact of tourism.	M

8. PRIORITIES FOR ACTION

Whilst each of the actions has an identified priority, the following are seen as projects that should be given priority in the next twelve months

1. Establishment of a skills based Tourism Advisory Group (GGTAG) to work with City of Geraldton-Greenough and Mid West Development Commission in providing support in the implementation of this plan.

G1 Call for nominations for a skills-based Tourism Advisory Group (GGTAG) to work with City of Geraldton-Greenough and Mid West Development Commission in providing support in the implementation of this plan. Members to be voluntary and advisory. Focus in initial stages to be advocacy, planning and support for product development with later establishment of a Marketing sub committee as implementation proceeds. GGTAG to be closely aligned with Australia's Coral Coast through membership and linkages in strategy

2. Engage suitable expertise to work with the tourism industry and other stakeholders to develop a Brand Strategy.

M1 Engage suitable expertise to work with Australia's Coral Coast, the tourism industry and other stakeholders to develop a Brand Strategy for Geraldton-Greenough to provide the basis for future marketing, collateral and experience development

3. Initiate the first annual tourism conference for Geraldton-Greenough to seek commitment to this plan.

G7 Initiate an annual tourism conference that brings together the tourism industry, provides opportunity for networking, and enables presentation of new ideas and learning about trends and initiatives that may impact on the region

4. Initiate discussions between Fisheries, the Abrolhos Island Management Committee and tourism operators in relation to strategic and sustainable tourism development of the Abrolhos Islands.

PE1 Facilitate discussions between Fisheries, the Abrolhos Island Management Advisory Committee and tourism operators in relation to strategic tourism development of the Abrolhos Islands to ensure sustainable management of higher levels of visitation and broader tourism experiences

5. Call for public expressions of interest or design competition to investigate an innovative, exciting and new concept for a day/night experience that could be delivered by private or public sector.

PE3 Seek to identify (through public expressions of interest or design competition) an innovative, exciting and new concept for a day/night experience that could be delivered by private or public sector that focuses on the Batavia story and brings it to life for

visitors and is of sufficient strength to attract the passer by market (examples include the Sarah Island theatrical story in Strahan, Tasmania or the Sovereign Hill laser and light show, Ballarat, Victoria) – ideally in the foreshore precinct

6. Develop a master plan for the Bill Sewell complex to identify future uses and linkages between the buildings

PE6 Develop a master plan for the Bill Sewell complex to identify future uses and linkages between the buildings and to optimise the tourism potential of the precinct for interactive visitor experiences and potentially arts, craft, retail

7. Review the options for the location of a new and vibrant Visitor Centre offering a broad range of relevant interactive experiences including Aboriginal and marine interpretation

I17 Review the options for the location of a new and vibrant Visitor Centre (potentially incorporating the Marine Discovery Centre concept) offering a broad range of relevant interactive experiences including Aboriginal and marine interpretation. Priority needs to be given to co-locating in one of the primary visitor precincts (the Bill Sewell complex, the marina or the foreshore area) rather than dispersing tourism services to other locations

8. Develop gateway orientation points for Geraldton-Greenough located, planned and designed so as to encourage passers by to stop or look

I14 Develop gateway orientation points for Geraldton-Greenough located, planned and designed so as to encourage passers by to stop or look

9. Complete the foreshore re-development project

I13 Complete the foreshore re-development project including consideration of water and adventure sport booking agencies and beginners programs in the precinct

10. Extend foreshore planning and development to create quality recreational settings at other visitor nodes including Point Moore and the Surf Club precincts

I15 Extend foreshore planning and development to create quality recreational settings suited to water sports, beach activities and day use at other visitor nodes including Point Moore and the Surf Club precincts

11. Identify opportunities close to visitor areas for establishing and signposting car parks and facilities for large vehicles and trailers

I19 Identify opportunities close to visitor areas for establishing and signposting car parks and appropriate facilities for large vehicles and trailers (eg dump points)

12. Pursue investment to develop a centre and/or facilities suited to major conferences

I7 Develop a strategy for the Conference market which includes development of a centre and/or facilities suited to major conferences

13. Develop and promote conference packages initially aimed at small conferences consistent with available venues and accommodation

M3 Work with the Perth Convention Bureau to develop and promote conference packages initially aimed at small conferences consistent with available venues and accommodation as a basis for further developing this market as larger facilities are brought on line

14. Leverage off the HMAS Sydney II exhibitions developing at WA Museum and planned development of the Fifth Element at the HMAS Sydney II National Memorial

M10 Leverage off the HMAS Sydney II exhibitions developing at WA Museum and planned development of the Fifth Element at the HMAS Sydney II National Memorial

15. Introduce a series of famils for the local community to gain greater understanding and commitment to the tourism opportunities offered by Geraldton-Greenough

M5 Introduce a series of famils for those members of the local community that have any dealings with visitors (garages, shops, accommodation etc) to gain greater understanding and commitment to the tourism opportunities offered by Geraldton-Greenough

16. Pursue investment in additional accommodation to match market needs including 4-5 star and self contained apartments

I5 Pursue investment in additional accommodation to match market needs including 4-5 star and self contained apartments

17. Expedite planning permission and necessary approvals processes and support and encourage the continued development of accommodation including development proposed for marina and renovations of other venues

I6 Expedite planning permission and necessary approvals processes and support and encourage the continued development of accommodation including development proposed for marina and renovations of other venues

APPENDIX A

New accommodation proposed for Geraldton-Greenough

These accommodation developments are those assessed as proceeding or likely to proceed in the August 2008 accommodation study by Jones Lang LaSalle Hotels. (JLLH, 2008).

Accommodation development	Completion date	Rooms	Rating (stars)
Under construction			
Broadwater Mariner Resort	Jan 2009	58	4
Proposed or Likely			
African Reef Motel (Stage 1)	2009	40 cabins	3.5
"Confidential Establishment"	2010	144	4
Batavia Coast Marina Hotel	2010/11	77	4.5
Abrolhos Islands Resort	2010/11	30	5
African Reef Motel (Stage 2)	2013/14	133	4.5
Batavia Coast Marina (Stage 2)	2011	unknown	3.5-4
Public Transport Authority site - future development	2011	unknown	4.5-5
Greenough Rivermouth Caravan Park	2008	10 cabins	unrated
Mahomets Village Caravan Park ??	2009/10	60 sites	n/a
Drummond Cove Holiday Park redevelopment	2010	unknown	unknown

Source: JLLH (2008)

APPENDIX B

Current key tourism attractions in and near Geraldton-Greenough

ATTRACTION	ASSOCIATED ACTIVITIES/COMMENTS
CITY ATTRACTIONS	
Batavia Coast Marina	Boardwalk, waterside eating, WA Museum Geraldton.
Fishermen's Wharf	Working fishing boats. Live Lobster Factory tours from Nov to June.
Shopping	Local products (Abrolhos pearls, olives, honey, Aboriginal art & craft), local markets.
Range of civic facilities	Includes library, theatre, cinema, Aquarena swimming complex.
OUTDOOR ACTIVITIES	
Surfing	Range of surfing beaches in and near Geraldton.
Wind & Kite Surfing	Australia and world renowned location for wind and kite surfing. Equipment hire and lessons available.
Walking trails	Foreshore Walk (6km); Greenough River Natural Walk Trail (17 km return), also suitable for mountain bikes; Chapman River Regional Wildlife Corridor (8 km return)
Range of recreational facilities	Includes Aquarena swimming complex, 2 18-hole golf courses, 2 surf life saving clubs, 2 lawn bowls clubs, 3 tennis clubs, basketball arena, netball arena, soccer / hockey grounds, several football grounds, bmx course, Speedway, rowing club at Greenough Rivermouth, ten pin bowling, turf club, PCYC and much more.
HERITAGE & CULTURE	
WA Museum Geraldton	State of the art museum, including Shipwrecks Gallery featuring 1629 "Batavia" shipwreck and mutiny story.
Central Greenough Historic Settlement	Restored historic buildings from 19 th century pioneer settlement. Café/restaurant. 20 km south of Geraldton.
Greenough Pioneer Museum	Located in 1862-80 homestead, 19km south of Geraldton.
Walkaway Railway Museum	20 km from Geraldton, near Greenough.
Oakabella Homestead	Restored 1860 homestead and museum 30 km north of Geraldton. Café, scenic gorge and waterfall.
Hampton Arms	Operating historic wayside inn about 20 mins drive south of Geraldton. Rare bookshop.
Ironbarks Old Forge	Restored historic property and art & craft shop south of Geraldton.
Lighthouse Keepers Cottage	1876 cottage in Geraldton, now housing Geraldton Historical Society.
Point Moore Lighthouse	Distinctive red and white banded 1878 lighthouse in Geraldton. Interpretation but not open to public.
Bill Sewell Complex	Historic buildings dating from 1850s now housing Geraldton Visitor Centre and other organisations.
St Francis Xavier Cathedral	Designed by architect Monsignor Hawes (who designed a number of buildings in WA). Guided tours.

HMAS Sydney II Memorial	Memorial in Geraldton to loss of ship and sailors in World War II battle. Guided tours.
RSL Military Museum	Significant collection of military memorabilia with local connections. Guided tours, linked to HMAS Sydney II Memorial.
Old Geraldton Gaol & Craft Centre	1858 building within Bill Sewell Complex. Guided tours.
Greenough-Walkaway Heritage Trail	57km drive trail through the Greenough area.
Marra Gallery (Yamaji Arts & Crafts)	Situated in Bill Sewell Complex.
Geraldton Regional Art Gallery	Funded by CGG and Art Gallery of WA. Includes work by Elizabeth Durack, Norman Lindsay and local artists. International, national and local exhibits.
NATURAL ATTRACTIONS	
Abrolhos Islands	Archipelago 60 km from shore known for rich marine life; birds; marine mammals; coral reefs; lobster fisheries; and 1629 "Batavia" wreck. No tourist accommodation currently – although a 60 person luxury resort development is proposed and is awaiting final government approval as to its location and environmental aspects. Fly-over, fly/land, snorkelling tours; boat charter tours.
South Tomi Dive Wreck	Artificial reef and dive attraction.
Ocean Charters	Various fishing, diving and overnight tours.
Wildflower tourism	Extensive wildflower displays from August to October in locations accessible from Geraldton. Includes Chapman River, Coalseam Conservation Park (about 1 hour drive inland from Geraldton) and Kalbarri National Park (on the coast about 160 km north of Geraldton).
Chapman River	Chapman Regional Wildlife Corridor trails; wildflower displays; bird watching.
Greenough River	Greenough River Natural Walk Trail (walking or cycling); bird watching; fishing; rowing.
Southgate Dunes	Immediately south of city. Sand boarding etc.
Moresby Ranges	North east boundary of city. Recreational use includes hang gliding, mountain biking, hiking.
Ellendale Pool	Picnic and camping spot 45 km south of Geraldton.
Leaning Trees	"Signature" River Red Gums leaning from the prevailing winds near Brand Hwy at Greenough Flats. Parking area.
Birdwatching	Including Chapman and Greenough Rivers, Abrolhos Is.
Greenough Wildlife & Bird Park	20 km south of Geraldton.
Scenic flights	To a variety of locations.
EVENTS	
Red Hill Concert	March each year
Nukara Music Festival	Nukara Farm, Chapman Valley. Bi-annual March & November.

Easter Open	Geraldton Tennis Club. Easter weekend each year.
Indian Ocean Rowing Race	International biennial event Geraldton - Mauritius. April 2009 first race.
June Carnival (bowls)	Geraldton Bowling Club, June each year
June Carnival (softball)	Geraldton Softball Association, June each year.
Coral Coast Classic	Surfing WA – tagged to develop along the lines of Margaret River Classic. August 2009 first event.
Australasian Safari	Car rally, over night stop in Geraldton. August 2008 was first visit and likely to continue.
Big Sky Writers & Readers Festival	Geraldton Regional Library. September each year. http://library-bigskyblog.blogspot.com/
Crayfish Carnival	Geraldton Clay Target Club, September each year
State BMX Championships	Woorree Park. September 2009
Midwest Show & Shine	Car show. Long weekend September each year. http://www.mwshowandshine.com/
Geraldton-Greenough Sunshine Festival	October each year. http://www.sunshinefestival.com.au/
Dragonboat Classic	Geraldton Yacht Club, October each year.
Blessing of the Fleet	Geraldton Fisherman's Coop. October each year. http://www.gfcblessing.com/
State Surf Life Saving Championships	Geraldton Surf Life Saving Club. Every 4 yrs. 2009 - Australia Day weekend.
State Championships (athletics)	Geraldton Little Athletics Centre. Every 5 yrs.
Regional Junior Football Carnival	Midwest Football Regional Development Committee. Annual competition

Sources: Geraldton Visitor Centre (2008); DEC (2008).

APPENDIX C

GERALDTON-GREENOUGH VISITOR DATA

Table C1: Visitor numbers and visitor nights - Geraldton-Greenough, 1999-2001 to 2005-2007

	Annual Average 1999-2001		Annual Average 2002-2004		Annual Average 2005-2007	
Visitors						
Intrastate	201,000	75%	200,000	76%	177,000	73%
Interstate	38,000	14%	33,000	13%	39,000	16%
International	28,100	11%	26,600	11%	25,600	11%
Total	267,100	100%	262,600	100%	241,600	100%
Nights						
Intrastate	586,000	73%	588,000	70%	530,000	68%
Interstate	122,000	15%	117,000	14%	139,000	18%
International	94,100	12%	131,000	16%	106,000	14%
Total	802,100	100%	836,600	100%	775,000	100%
Average Length of Stay (Nights)						
Intrastate	2.9		2.9		3.0	
Interstate	3.2		3.5		3.6	
International	3.3		4.4		4.1	
Total	3.0		3.2		3.2	

Source: TWA (2008b)

Table C2: Age of overnight visitors - Geraldton-Greenough, 2005-2007

Age class	Annual Average 2005-2007	%
Domestic (Intrastate & Interstate)		
15-24	26,000	12%
25-44	72,000	33%
45-64	79,000	37%
65+	39,000	18%
Total	216,000	100%
International		
15-24	3,500	14%
25-44	10,900	43%
45-64	8,300	32%
65+	2,900	11%
Total	25,600	100%

Source: TWA (2008b)

Table C3: Purpose of visitation – overnight visitors to Geraldton-Greenough and Coral Coast, 2005-2007

	Geraldton-Greenough Annual Average 2005-2007		Coral Coast Annual Average 2005-2007
	Visitor numbers	%	%
Domestic Visitors (intrastate and interstate)			
Holiday/leisure	85,000	39%	57%
Visiting friends & relatives	69,000	32%	22%
Business	40,000	19%	16%
Other	22,000	10%	6%
Total	216,000		
International visitors			
Holiday/leisure	22,300	87%	90%
Visiting friends & relatives	2,200	9%	6%
Business	300	1%	2%
Other	900	4%	3%
Total	25,600		

Sources: TWA (2008b); TWA (2008c)

APPENDIX D

SHIRE OF GREENOUGH VISITOR SATISFACTION SURVEYS 2005-07

Four face to face surveys of 100 people each were conducted in April-June 2005, November 2005-March 2006, April-May 2006 and February-March 2007 (Clarence, 2007). The respondents ranged in age from 18 to 75 and covered all age groups and intrastate, interstate and international visitors. Overall, 52% of respondents were male and 48% were female.

SUBJECT	% SATISFIED	MOST LIKE ASPECTS	LEAST LIKED ASPECTS
Overall visitor satisfaction with Geraldton	79%	Friendliness of locals Great weather Beaches Excellent museums Water sports	Travel distance Limited activities Intoxicated people in public Unsafe/poor roads Development/road works Lack of developed and maintained road verges Lack of atmosphere Wind/dust Lack of coffee shops/cafes Lack of services/shopping on weekends
Accommodation	81%	Good location Value for money/good rates Good customer service Staff competence and friendliness	Too noisy (due to location) Low maintenance standards Uncleanliness Poor quality of buildings/decor
Attractions	84%	Authenticity Uniqueness Heritage/culture orientation Value for money Lack of crowds Family friendly Great beaches	Limited number and variety of attractions Limited opening hours Facilities and safety at beaches Poor access/parking for larger vehicles Limited brochures on site Low standard of presentation
Infrastructure	82%	Good signage Simple town layout Availability of goods and services Good roads Shopping precinct near foreshore	Developmental and road works Unclean public toilets Availability of rubbish bins Signage Limited parking in CBD/shopping areas Undeveloped foreshore Lack of public transport

Source: Clarence (2007)

APPENDIX E

Market segments for caravan park users in WA

The following market segments were developed from a survey of 406 WA caravan park users as part of a 2006 study of the WA caravan park industry conducted for TWA and Tourism Research Australia.

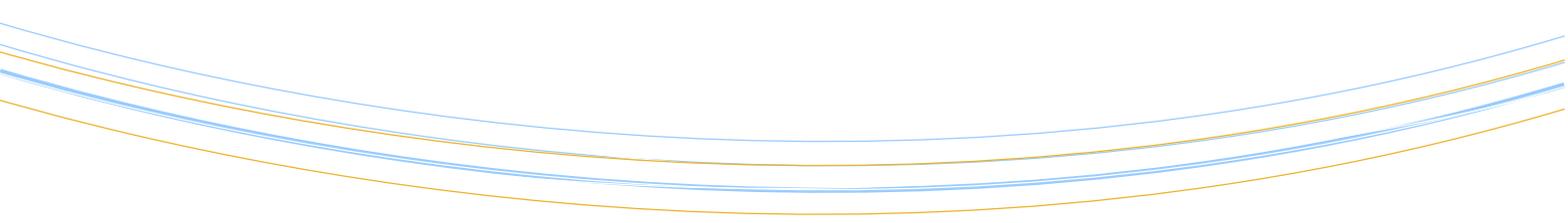
Category	Segment	% of survey	Visitor characteristics	Trip characteristics
Travellers	Grey Nomads	40%	55+ years. Reside interstate – most started their trip in Qld or Vic. Variable budgets, but all are price conscious. Most are on fixed budgets.	Tend to be on extended trips, often also in other States. Spent average of 109 nights in WA.
	International Travellers	3%	Typically staying in a caravan park to afford a longer holiday.	
	Freedom Seekers	13%	Typically younger couples or friends, though some older. Reside interstate, most likely to have started their trip in Vic. Tend to have higher household incomes (\$50K+).	On a shorter trip, usually less than 3 months
Holiday-makers	Families	13%	Usually young families with children. From intrastate - usually started their trip in Perth. Budget conscious (but also concerned about quality).	Most likely to stay in the Perth or South West regions.
	Winter Drifters	10%	Usually a retired couple over 55. From intrastate. Motivation is to escape the cold and relax. Budget considerations are very important. Free camping is also appealing.	Most likely to stay in the Perth or Coral Coast regions. Virtually "semi-permanents" in caravan parks – spend an average of 16 nights in a caravan park.
	Intrastate Holidaymakers	21%	Couples or friends travelling without children. Most likely to start their trip from Perth and stay in the Perth, Coral Coast and South West regions. Seeking a short, relaxing, cheap escape.	Most trips are less than a month, and 31% less than a week.

Source: TWA & TRA (2007)

APPENDIX F

Proposed tourism attractions in and near Geraldton-Greenough

DEVELOPMENT	DESCRIPTION	KEY AGENCIES	SOURCE
Marine Discovery Centre		MWDC	Coral Coast Destination Development Strategy 2007 (DDS)
Central Greenough Historic Settlement	Increased activities and improvements in interpretation and amenities.	City of Geraldton-Greenough (CGG), National Trust	Coral Coast DDS CGG (2008b)
Greater Geraldton Themed Interpretative Walk Trails	5 trails, starting with Foreshore Trail from the Geraldton Museum. Funding required.	CGG Mid West Trails Group	Coral Coast DDS CGG (2008b)
North Road Stock Route Drive Trail	Drive trail with 33 interpretation sites linking with existing Outback Pathways Trail and proposed Monsignor Hawes Trail (which also includes Geraldton). Feasibility study conducted. Funding required.	CGG, relevant local governments, DEC, Dept of Indigenous Affairs, MWDC, and other agencies	CGG (2008b)
Walking Tours	Proposal for series of walking tours with voluntary guides, including port, Chapman River wildlife corridor and spring wildflowers.	Geraldton Visitor Centre	Coral Coast DDS
Moresby Ranges	Proposal for recreation park.	CGG, DPI, DSR	Coral Coast DDS CGG
Indian Ocean Masters Games	Proposed tri-annual event.	CGG Mid West Sports Federation	Coral Coast DDS
International kite/surf boarding championships	Proposal requiring investigation (Geraldton Windsurfing Club/ Geraldton Visitor Centre)	Geraldton Visitor Centre Geraldton Windsurfing club	Coral Coast DDS
Artificial reefs	Planned for construction at Oakajee Port and Geraldton Back Beach. Feasibility study completed for latter.	Infrastructure developers Geraldton Boardriders Club	Coral Coast DDS



Appendix G SWOT Analysis from workshops

Strengths

Foreshore redevelopment and café / retail opportunity

Batavia – 400 years history

Weather and wind pattern

White sandy beaches / ocean

Hub to see other attractions in the region

Friendly and unpretentious place

Sydney Memorial

Museum as a regional Attraction

Airport and regularity of services

Built heritage/Heritage buildings

Farms (eco / farm stay)

Wine / olives

Chapman valley

Fish farm

Opportunities

Making more of the local produce

A major art/cultural centre

Uncrowded surf spots

Windsurf / kite surfing

Islands – heritage / wilderness

Conference and convention market

Most southern coral atoll

More biodiversity than Greater Barrier Reef

HMAS Sydney memorial and history

Leaning trees

Batavia story

Sunshine Festival

Gateway to Outback Pathways

One of the remotest sections of the Coral Coast

central town location for activities

Abrolhos Island – range of activities , heritage , Batavia etc

Seafood / local produce / diverse

Landscape / flora / fauna

Friendly people

VC change in management

Cycle-ways and paths

Wind farm

Weaknesses

Lack of alternative access and transport (eg train)

Regional travel / airline monopoly / cost

Negative perception of the city and safety

Variable Internet information

Indian Ocean Drive – Coastal lines

Food inconsistency (quality and availability)

Lack of taxis or other forms of public transport

Most significant single species industry (crayfish)

History / working port / crayfish (international)

Abrolhos Island – more experiences such as

✚ glass bottom boat

✚ accommodation on boats

✚ Diving & snorkelling – underwater caves / coral / shipwrecks

✚ Whale watching

Abrolhos Island –suitable infrastructure jetty, shade, tracks, guides

Adventure tourism (including hang gliding, mountain bikes, dunes, kite surfing, 4wd, etc)

Wind and water festival

Cruise ships / luxury boats

Airport – larger planes

Open and use Lighthouse

Bringing the Heritage buildings alive(eg Shearing sheep at Greenough Central)

Car culture – only way to get around

Absence of large vehicle (eg caravans etc.) parking close to town

Hotel / motel accommodation for tourists – diversity and number of beds available

Perth perception of Geraldton

Visitor centre – approach and information

Local attitude to tourism

Community failing to embrace tourism and take pride in itself

Marketing of assets

Fisheries management of Abrolhos Islands

Lack of cooperative support

No champion for Geraldton

Perception re Indigenous problem

Lack of signage into town – way finding / directional / gateway

Customer service

Security at night

Bigger capacity conference centre

Paint the silos – Indigenous? Seascape? (10 storeys high)

Making use of main street heritage buildings

Consistent standards

Old merry round

Indigenous businesses / art

Astronomy

Agribusiness / rural experience

Food / wine / nightlife

Indian Ocean Drive - Improved access / Faster / work your way to Geraldton

Education of local children into the tourism industry

Coordination of tourism and operators etc – critical mass

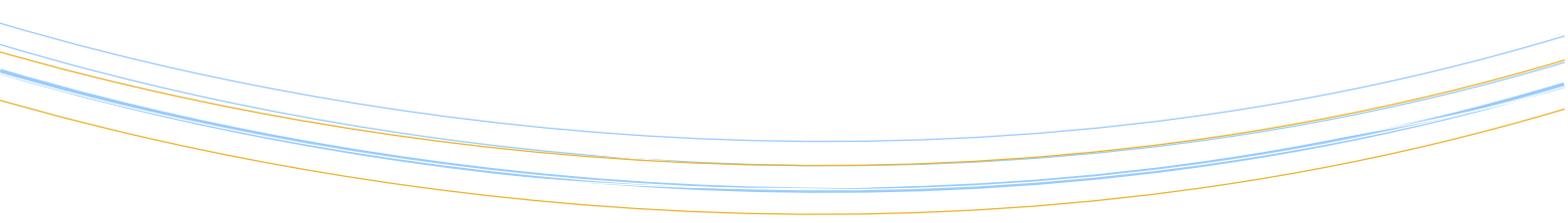
Get VC facelift and operations sorted

Get operator buy in to VC management

Pedestrian precinct

Day tours out of town – heritage / flowers / Indigenous

Campervan accommodation for backpackers



Caravan parking – secure – for day

Info bay for parking

Lack of connectivity in cycle ways

Absence of shade / bike racks

Threats

Not taking a long term view of tourism opportunities

Lack of government support for sustainable tourism on Abrolhos Island

Government failing to follow through on planning controls and conditions

Failing to get additional accommodation

Failing to attract investment

Community attitude re tourism

Failing to recognise the city's own icons

Failing to capitalise on or recognise the surrounding area eg Greenough

Poor marketing strategy and duplication of advertising

Harbour tours

Wine bars

Shuttle bus

Night markets for local food / craft

Bike hire

Buskers

Improved food opportunities for families – alfresco – weather

Cultural festivals

Range of festivals linked to industries (calendar of 10 years)

Event coordinator

Promote experiences on Indian Ocean Drive

Sea rescue association with adventure activities

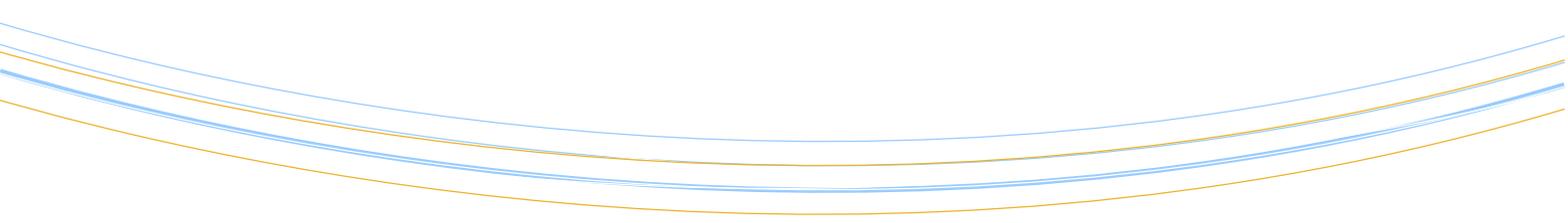
Branding to market for key attributes

Good effective marketing

Packaging of tourism experiences

Mid West Events . com website

Welcome pack



Continuing perception of Geraldton as a drive through destination	Famils for locals / media
Construction costs and living costs (eg. housing) resulting in restricting business development	Cross promotion
The Mid West Redevelopment Commission and the Coral Coast regions do not correlate with one another	Lookout/structure overlooking seal colony
Tourism management and coordination	Marine Interpretive Centre
	Water sports precinct closer into town

Continuing perception of Geraldton as a drive through destination

Construction costs and living costs (eg. housing) resulting in restricting business development

The Mid West Redevelopment Commission and the Coral Coast regions do not correlate with one another

Tourism management and coordination

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Cross promotion

Lookout/structure overlooking seal colony

Marine Interpretive Centre

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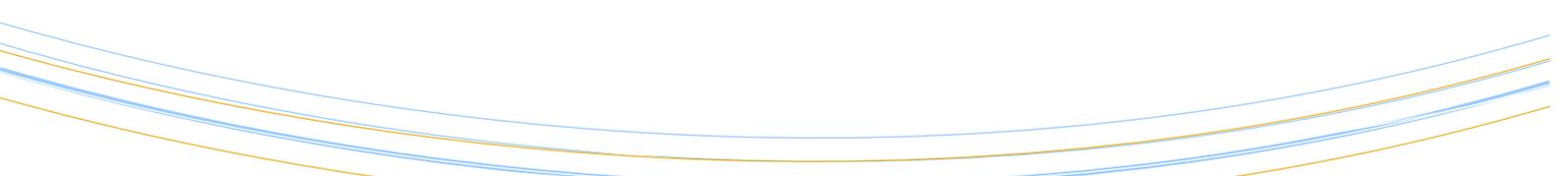
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