

DESTINATION

WORLDWIDE

TRAVEL

ADVENTURE

DISCOVERY

EXPLORATION

DISCOVERY

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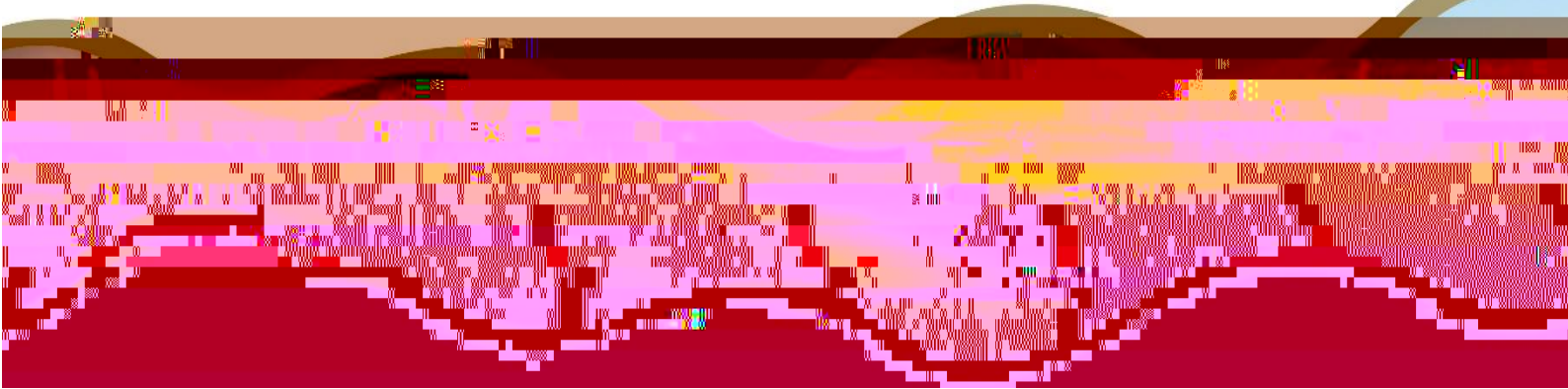
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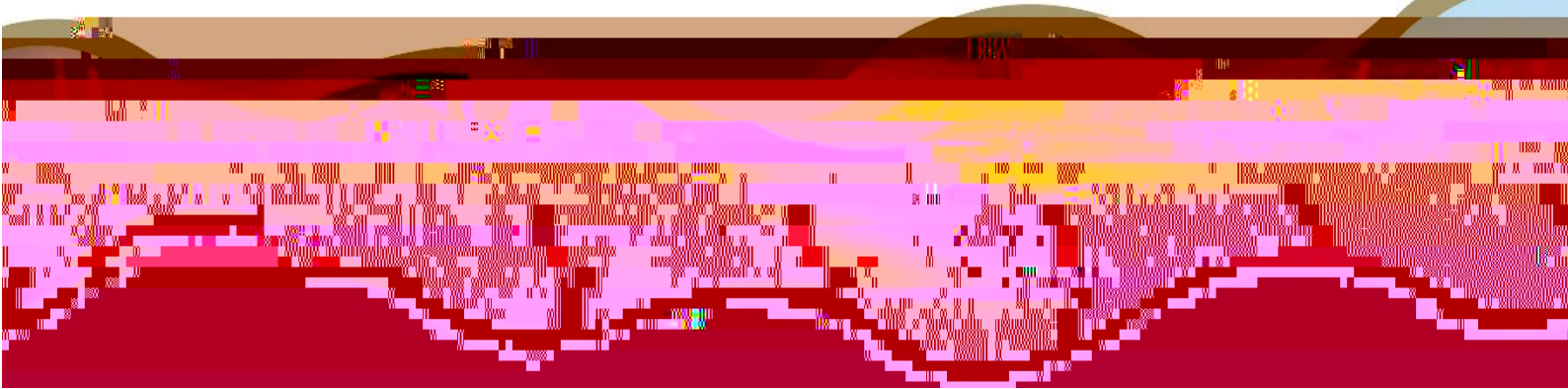
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For a variety of reasons, tourism in greater Geraldton (and the Coral Coast region) has been flat for some years which suggests that a new approach to destination management and marketing is required for significant growth is to be achieved

h... destination, and to trigger new and higher visitation including from new markets and segments not currently served

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

The regional funding environment has changed significantly in recent times, meaning that how tourism projects



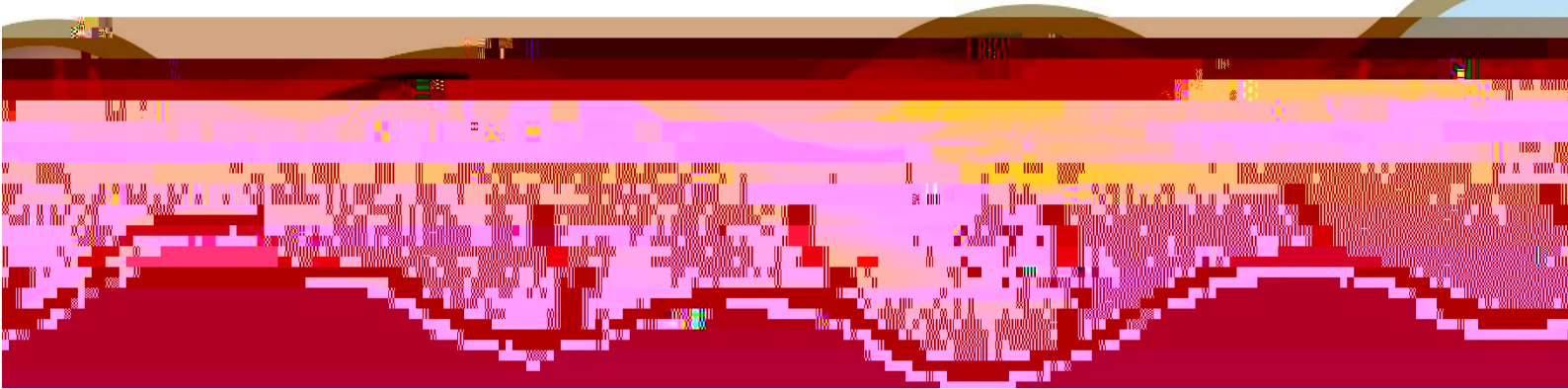


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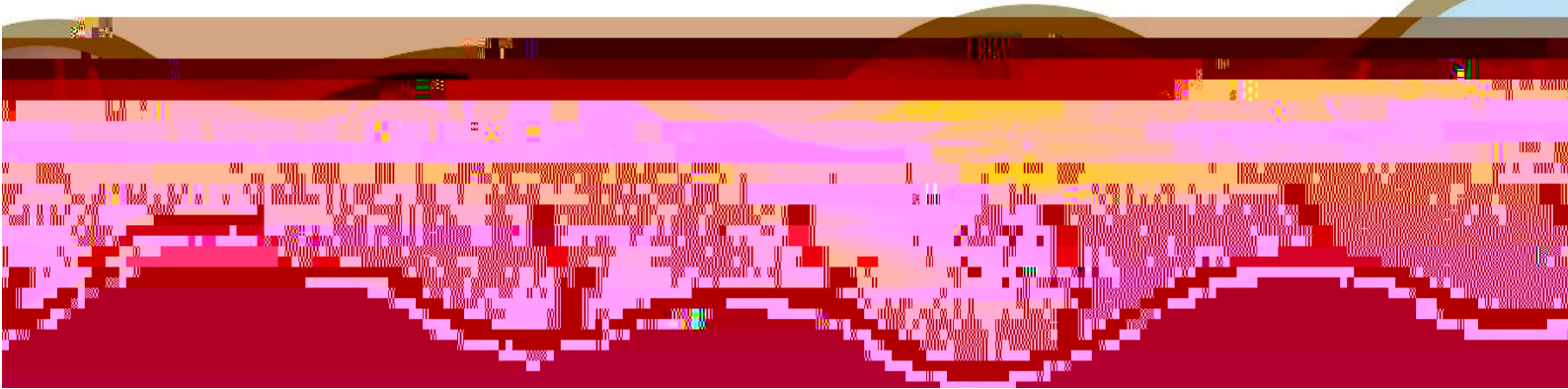
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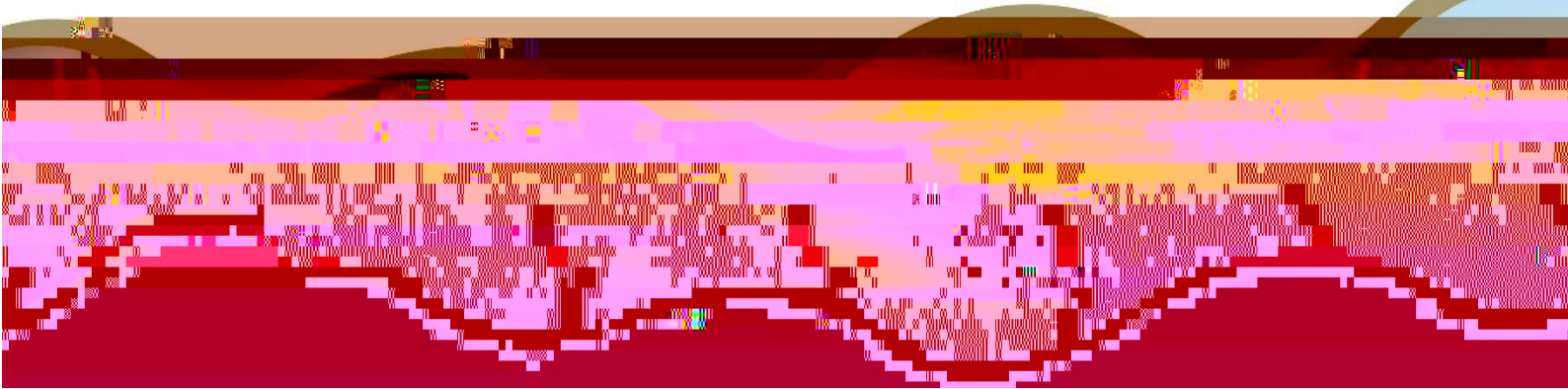
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Confidentiality

The informati



1. B



2. Defining the Destination

About Geraldton

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

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

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

Geraldton also offers a variety of water sports and activities, including surfing, kite surfing, windsurfing, diving, snorkelling, boating and fishing. Just 60 kilometres from the shoreline, are the coral-fringed Abrolhos Islands



4. Current Situation

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

A. Visitor Economy

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

Tourism contributed approximately \$148m to the greater Geraldton economy in 2015; REMPLAN estimates that every dollar spent on tourism has a multiplier effect of x1.3 to x1.6

The most valuable visitor group is domestic overnight leisure tourists: 23% of visitors, 72% of spending

Visitor trips to Geraldton are typically shorter than the WA average, and visitors spend less per night

There are significant seasonality gaps from November to March, which is both a challenge and an opportunity

There has been no change in Geraldton's share of regional tourism over time, nor in average takings per night

The cruise ship passenger segment is making significant contribution, of \$7.1m in 2015-16

B. Consumer Perceptions

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

Geraldton is not yet positioned as a standalone destination in its own right: it is not perceived as unique, and is not appealing as a destination. It is positioned as a stopover, as part of a longer journey to or through the region.

In the same vein, the tourists that do make a visit to Geraldton, are outside Geraldton

A huge majority (91%) of leisure visitors are self-drive

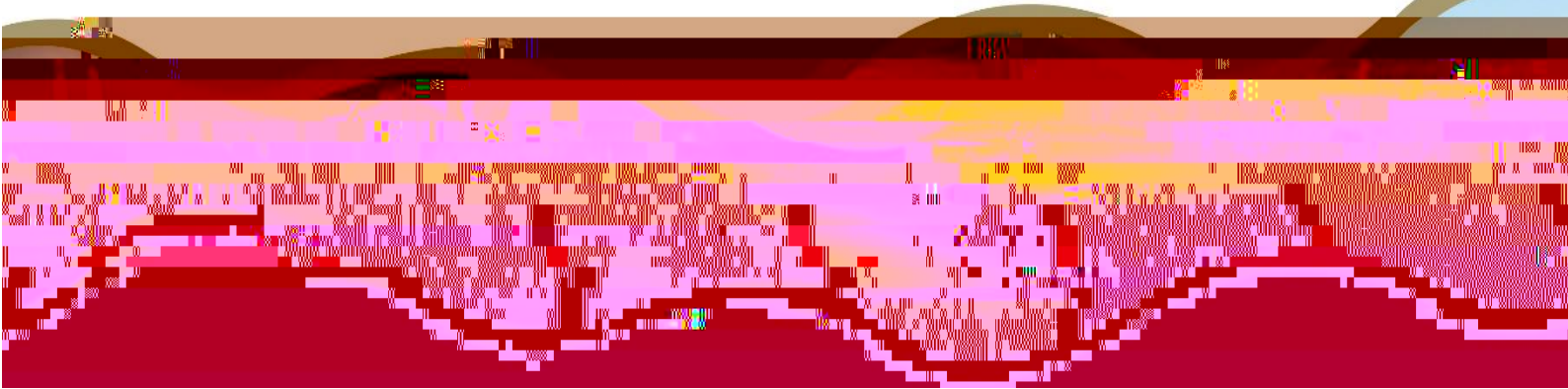
With strengths in accommodation and services, Geraldton has a real opportunity to be a hub for visiting iconic destinations in the region eg Kalbarri, Abrolhos, wildflowers, Shark Bay, southern Coral Coast

Consumers see a number of potential experience areas that could be leveraged (such as seafood and maritime history), and also a range of barriers to this being achieved (discussed later in detail).



G. Industry Perspective

- U # 8
- “ The sector has seen past issues with fragmented leadership and under-funded industry plans, and
 - “ Past plans suggest Geraldton tourism has been at a strategic crossroads for some time
 - “ Notwithstanding the above, there has been good progress in a number of areas – reflected in Geraldton winning the 2016 Top Tourism Town Award
 - “ The new destination management and marketing structure, together with partnerships with key stakeholders, presents an important opportunity for a collaborative approach and shared investment
 - “ With the newly-formed Tourism Industry Leadership Group addressing past leadership challenges, a central issue now is resourcing over the longer term – for tourism projects, tourism marketing and for



6. Our Tourism Goals

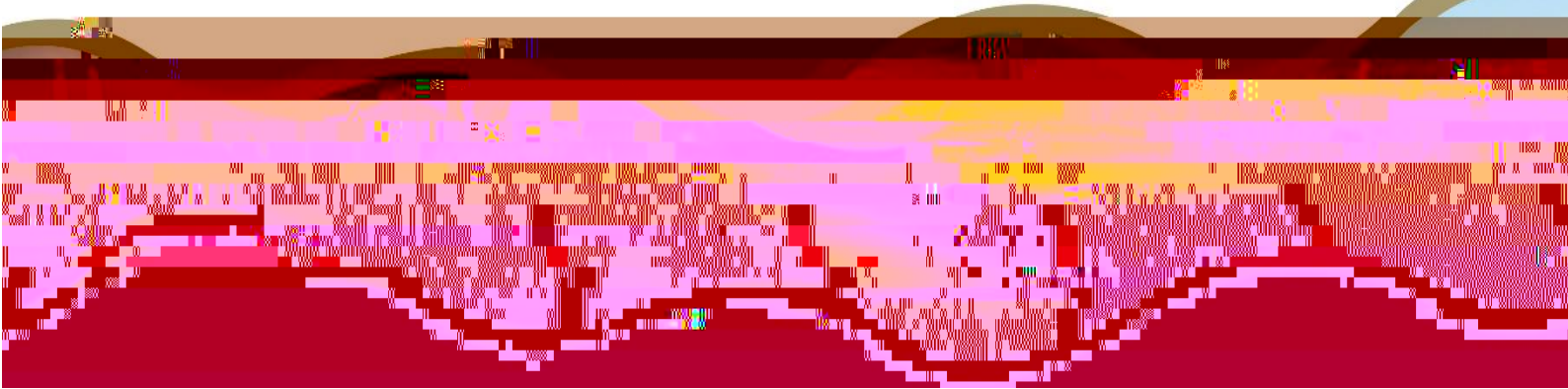
7. The Destination Strategy

Destination Strategy Concepts

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

A. Focus Trade-Off

Tourism destination planning is always complex – there are a huge range of challenges and opportunities to consider, many stakeholders with direct and indirect interests, and many different ways in which tourism objectives could be achieved. The process is also constrained in what ways to proceed, particularly in an environment of limited resources and a natural need to see results and return on any investments. This leads to the need to make trade-offs in developing a strategy and plan that balances, and many different ways in which tosn71 0 5(

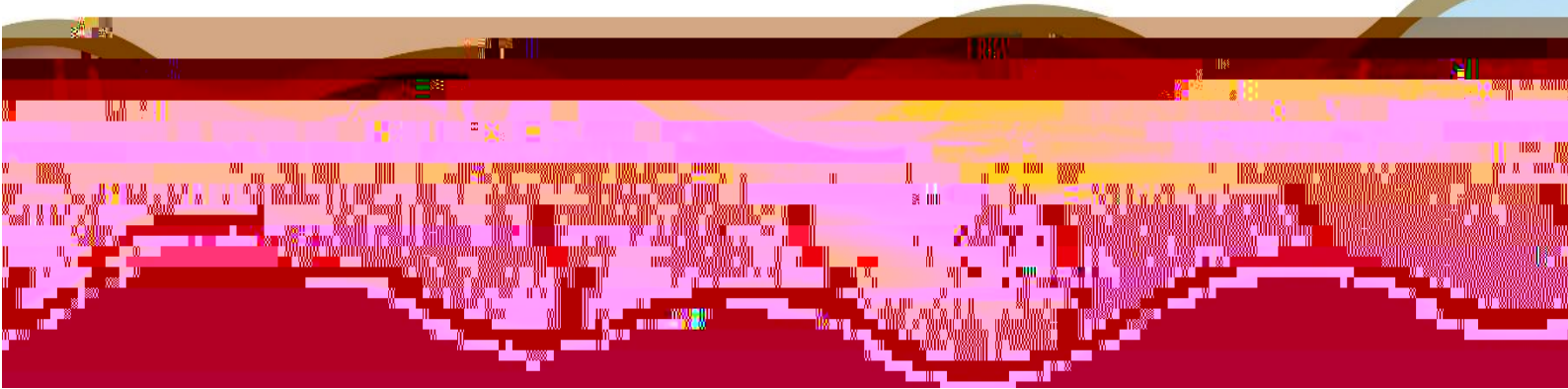


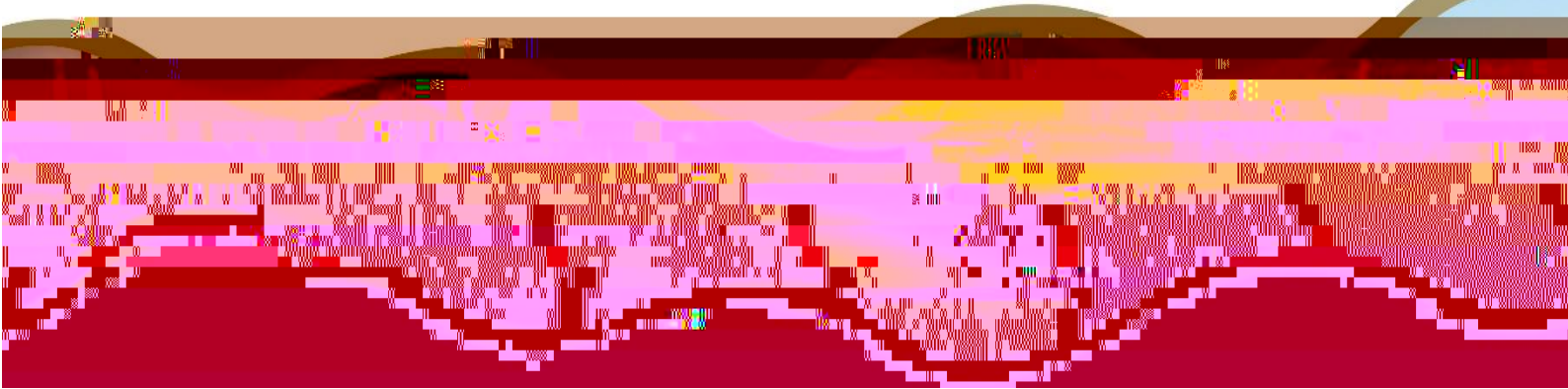
B. Distance Pull

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

In their view, the *Distance Pull* refers to *how important or interesting an attraction or activity is to a*

Distance pull refers to





The Destination Strategy

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

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

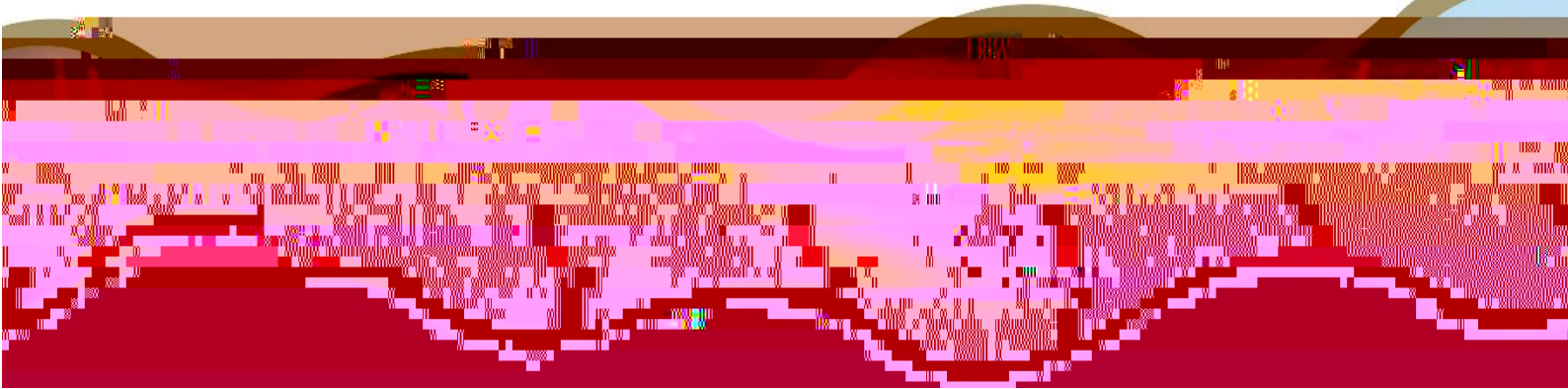
Greater Geraldton Destination Management Strategy: Overview

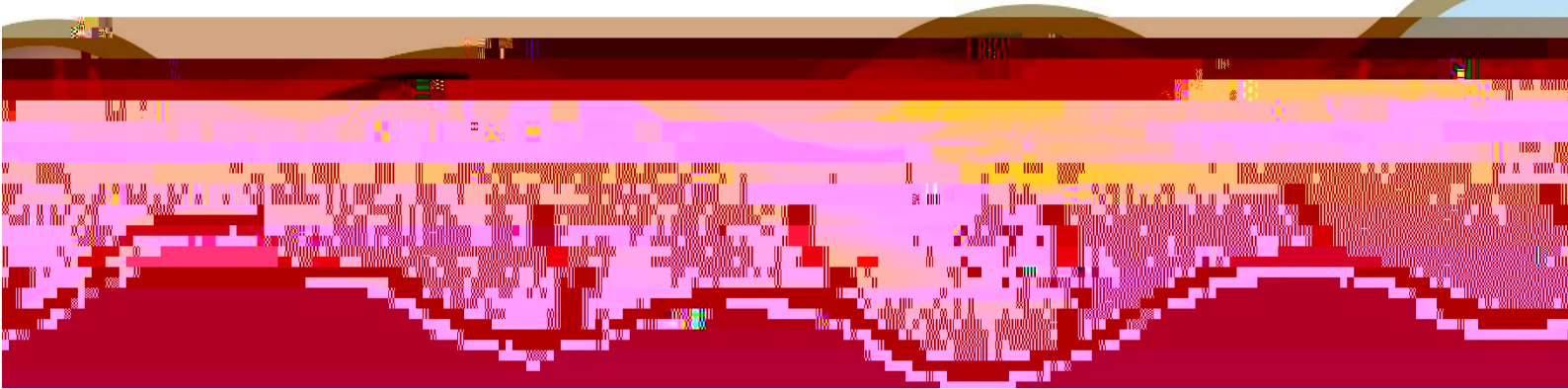


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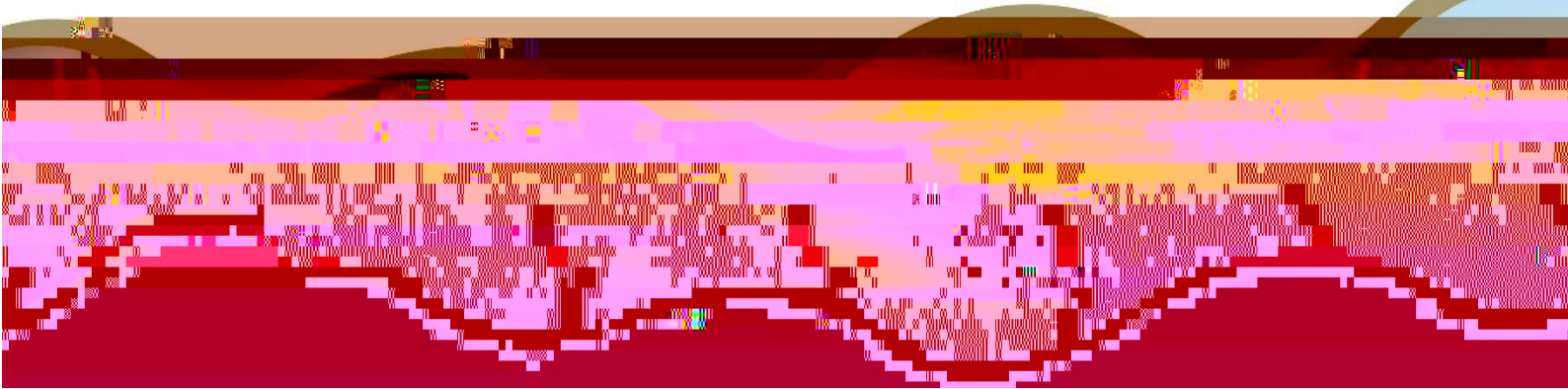
1. Leadership, Resourcing and Focus
2. Hub and Spoke
3. Product & Experience Development
4. Access, Infrastructure & Experience
5. Strategic Niches
6. Brand and Marketing
7. Industry Development

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





Cruise Tourism (already created) 2000-84 P.92 Facilities, BT, CA, F1, 0, 000, 000 Parks and Recreation /F1 p871132 S
Cultural, Eco & Geo Tourism - History, Natural Assets and Ecology, Creating a Tourism Zone



Progress Midwest and its partners (including the City of Greater Geraldton and Australi # #
8 8

economy and on encouraging visitation between Geraldton and surrounding areas.

Organisations representing the tourism sector in (including Shires and visitor centres in those destinations) would remain responsible for growing tourism in those areas; those organisations wishing to actively collaborate (for example by contributing or sharing resources) with Progress Midwest would be encouraged to do so. This would type agreements with Progress Midwest, confirming how the parties could work together for mutual benefit.

Project 2A: In-Transit Activation

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

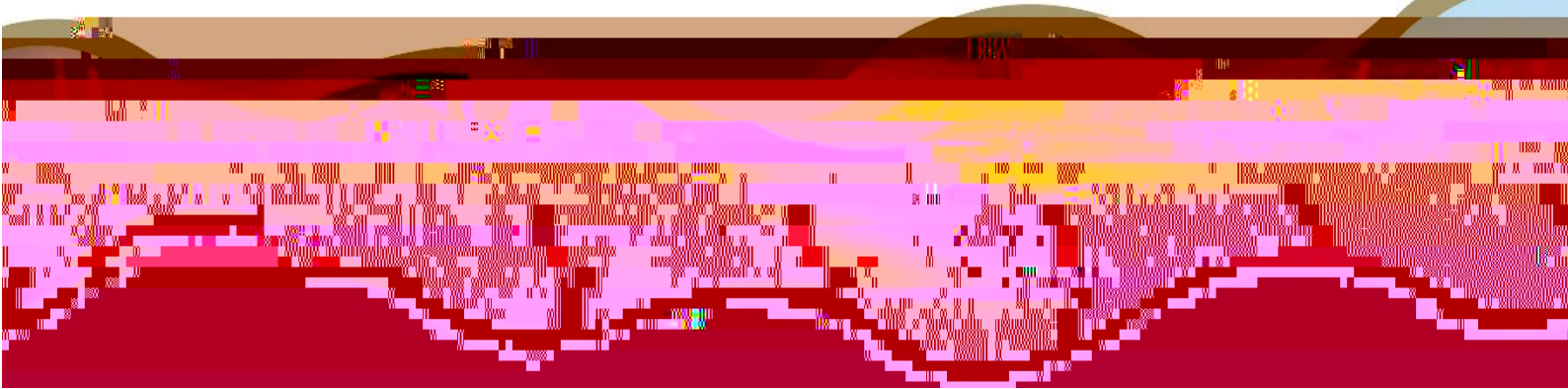
Project 2B: The Stop Over Experience

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

Project 2C: Stay Longer Deals

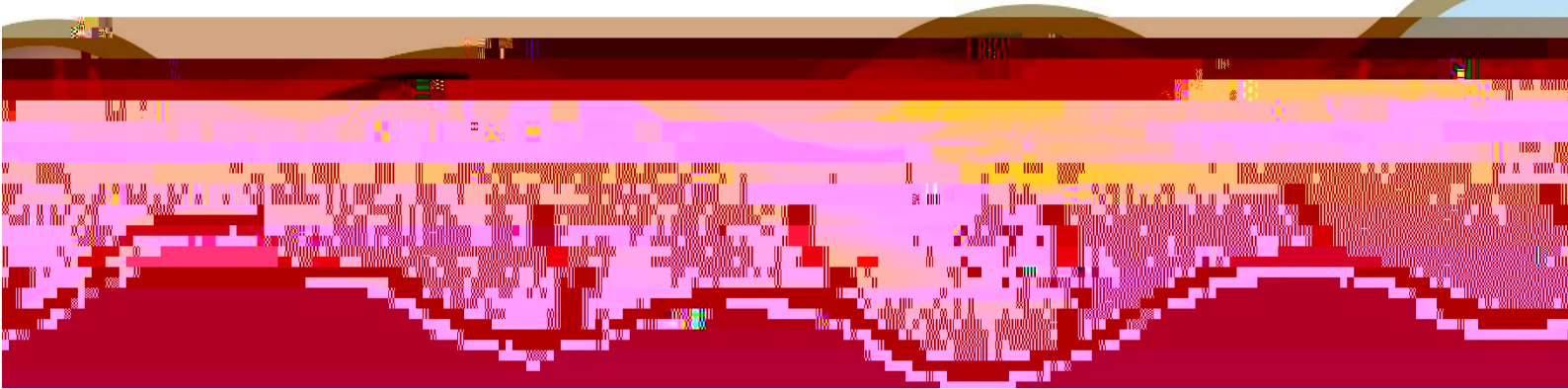
- *Project 2C: Stay Longer Deals* is a series of offers designed to encourage visitors to stay longer at the resort, such as Pay 3 Stay 4, Pay 4 Stay 5, and Pay 5 Stay 6 (particularly for quiet months). Visitor research found that a





Recommended Approach for Assessing Potential Projects

Score	Time	Visitor Impact	Cost	Yield Impact
3	Could be developed in			



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

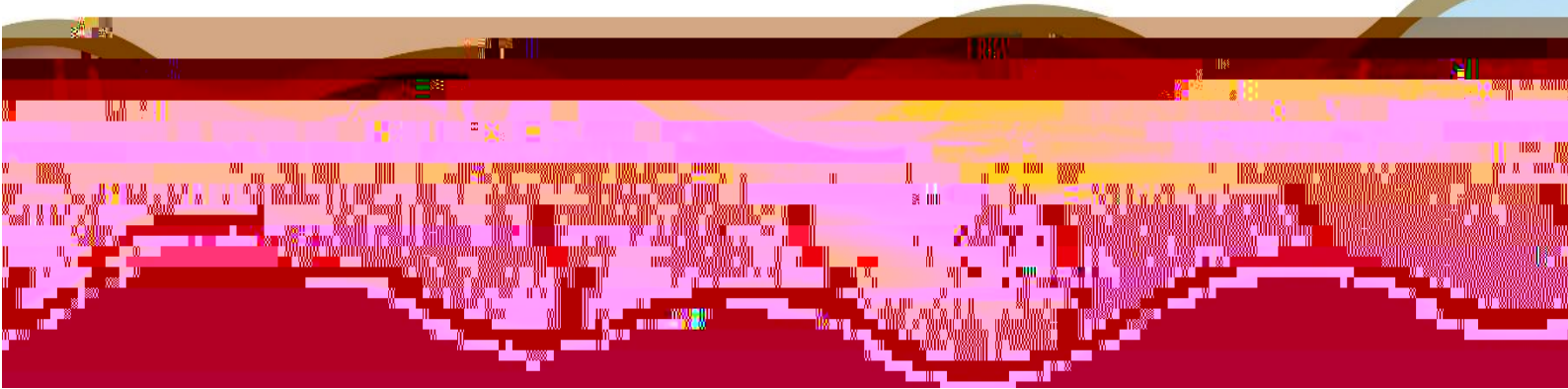
#	Project	Description
1	Rock Lobster Retail	# 1100 - style focal point for seafood tourism and retailing in the Fishing Boat Harbour. For example, a market/food-hall style environment where multiple retailers can have a presence in one place, integrated into the live lobster tours. Consider showcasing other local/regional produce. Combining or co-locating with a heritage experience may further increase the appeal.
2	History & Heritage Activation) and maritime history. While a museum redevelopment has been discussed for some time (see below), there are a range of other opportunities including interactive/digital interpretation.
3	Medallia Beach Underwater Park	Our understanding is that this concept mirrors similarg/9.11E011A0427.63 368.1

Category 1: Growth Projects (continued)

#	Project	Description
9	Geraldton Caravan Park Feasibility	From 2014 Mid West Tourism Development Strategy: Continue to investigate the development of an additional caravan park within proximity to the coast, in the township of Geraldton, preferably with a limited number of permanent residents and a mix of cabins, powered sites, unpowered sites and basic amenities for travellers.
10	Overnight Rest Bays	From 2014 Mid West Tourism Development Strategy: Investigate the development of 24hr overnight rest bays within 25-75km of Geraldton.
11	Regional Hinterland Short Stay Campsites	From 2014 Mid West Tourism Development Strategy: Investigate the upgrading and / or development of short stay camp sites within the regional hinterland; install signage, promote in planners / brochures, and include on website listings; encourage growth in travellers staying overnight in the region. Note this dovetails with the Mid West Coastal Nodes camping project, for which \$2.52 million was budgeted and works commenced in 2016.
12	Central Greenough Hamlet Upgrade	From 2011 Mid West Investment Plan: As masterplan reference 834, it was proposed to um-5(um-5(um-t.62 529.63 0.48 29.28 ref531.22 529.63 0.47998 ()

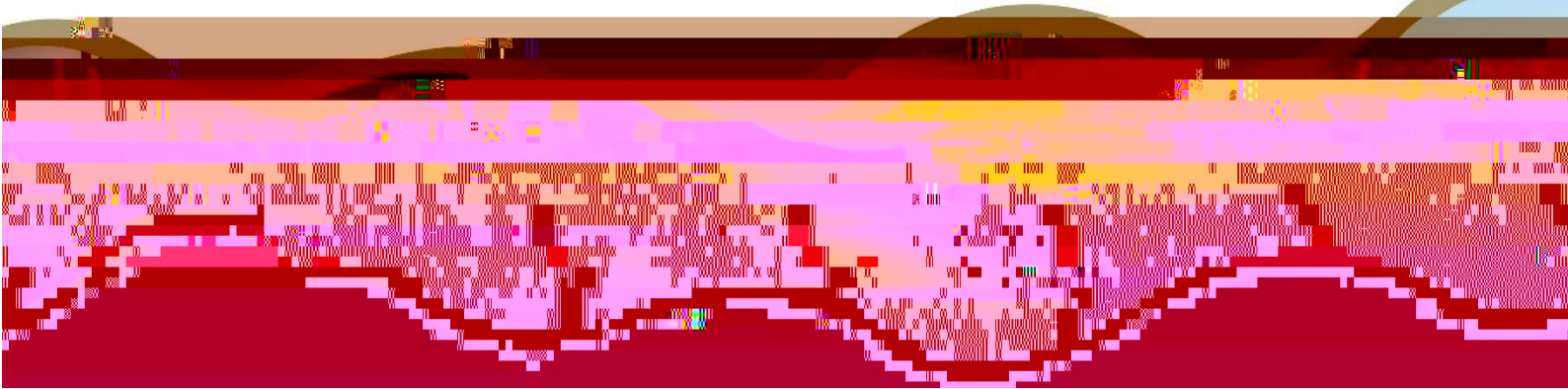
Category 2: Catalyst Projects (“Game Changers”)

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



Pillar 4: Access, Infrastructure & Experience

Project 4A: Shore-side Cruise Infrastructure



Project 4E: Vibrant Visitor Experience

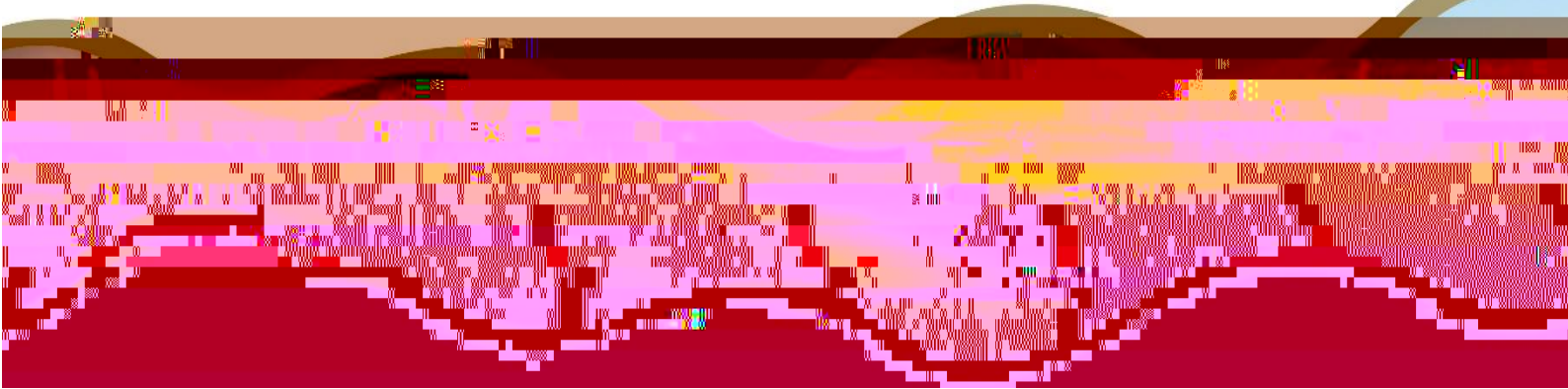
There has been consistent feedback over some years around perceptions of the city centre not being activated or vibrant, with specific feedback about [the city centre](#) . Similarly, there has been feedback

Project 5B: International Visitors

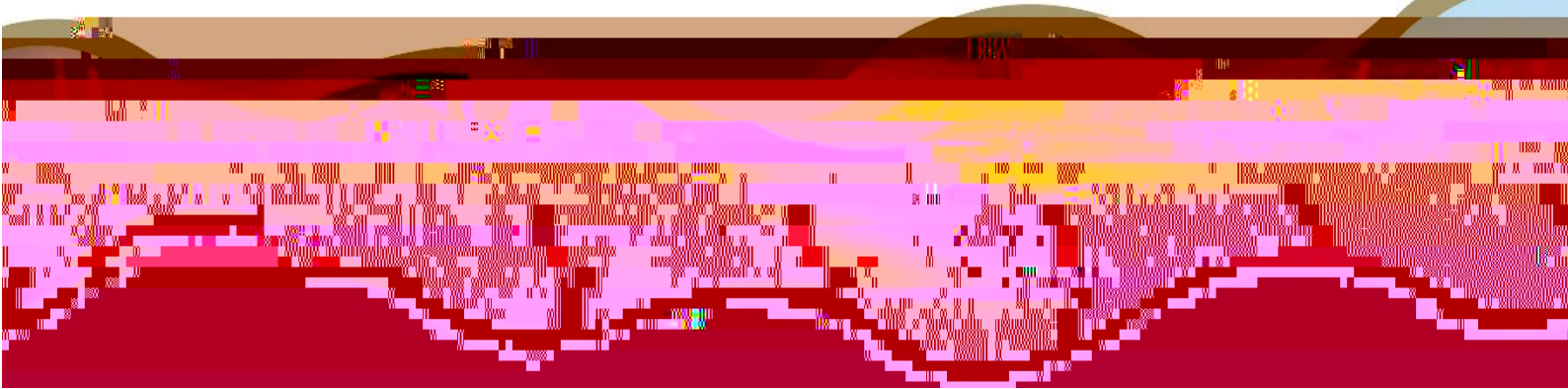
International visitors are a small but strategically important focus segment for growing the visitor economy and the Government of Western Australia has responsibility for marketing to this group overall (and so would be reflected in partnership agreements with those organisations), tactical engagement (for example targeting the China market, building on the success of recent years through operator air charters) could be continued on a cost/benefit basis. Together with China, Singapore and Malaysia are Tourism WA's most important markets. Other markets, such as the United Kingdom, the United States and Australia, are important, these are unlikely to justify investment beyond that already undertaken by those organisations.

Project 5C: Food Experiences

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

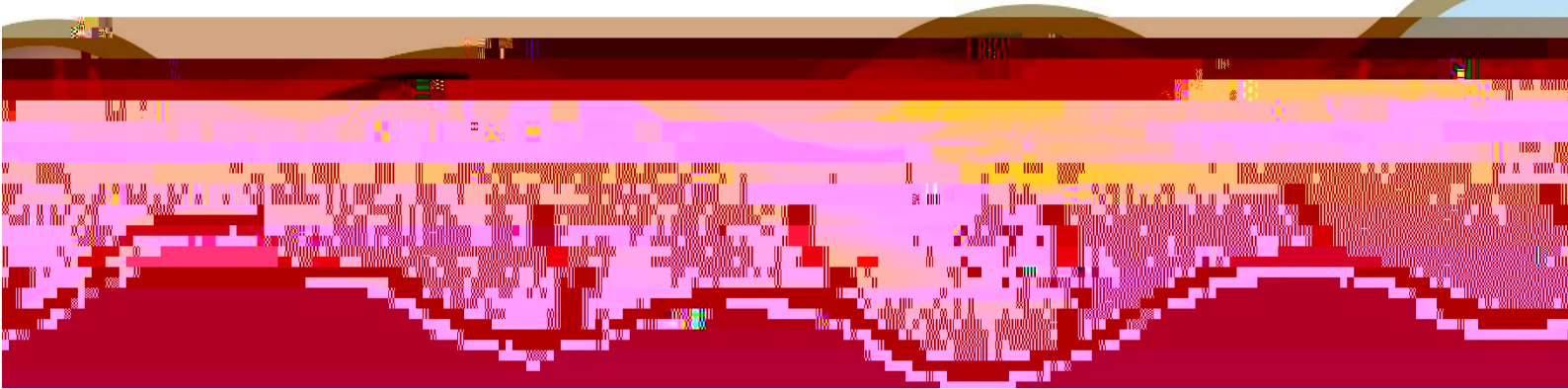


Pillar 6: Industr

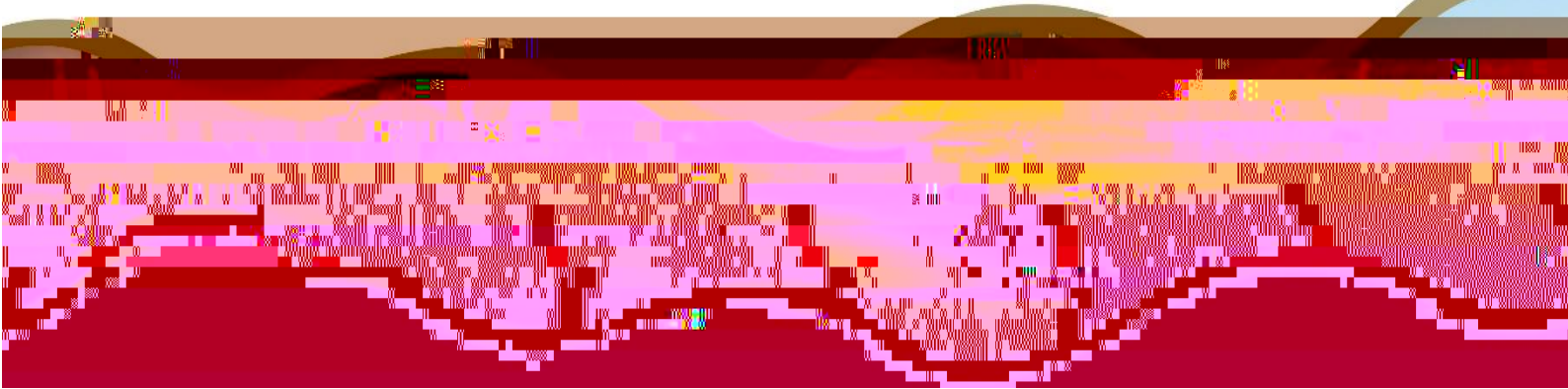


Pillar 7: Brand and Marketing

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

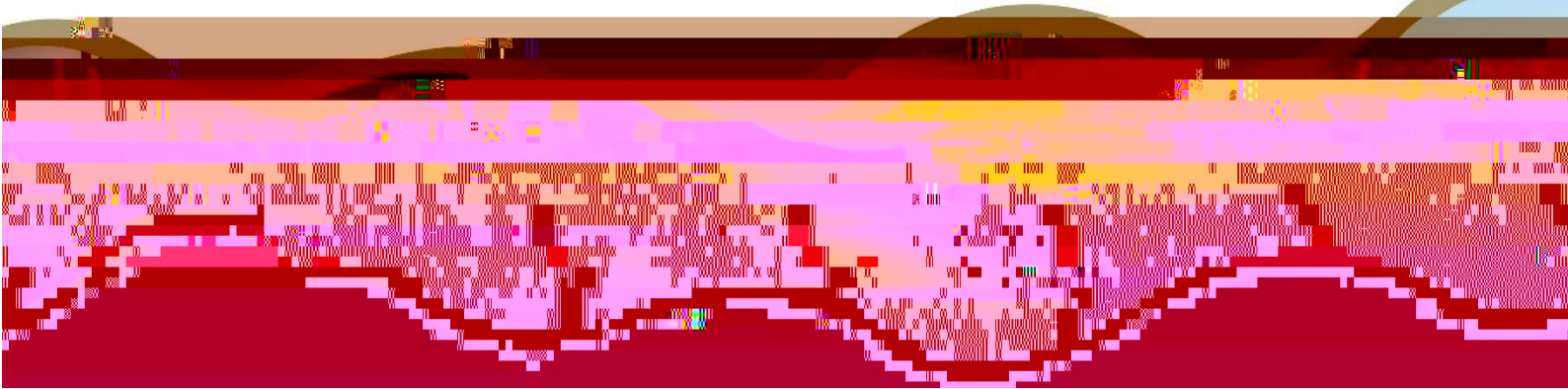


Geraldton: Take a Fresh Look



Project 7C: Touchpoint Activation

A consistent challenge in en route and in-market tourism marketing is reaching visitors at critical moments of decision making around travel pathways, attractions and activities. An important challenge is staying longer or doing more. An important cha



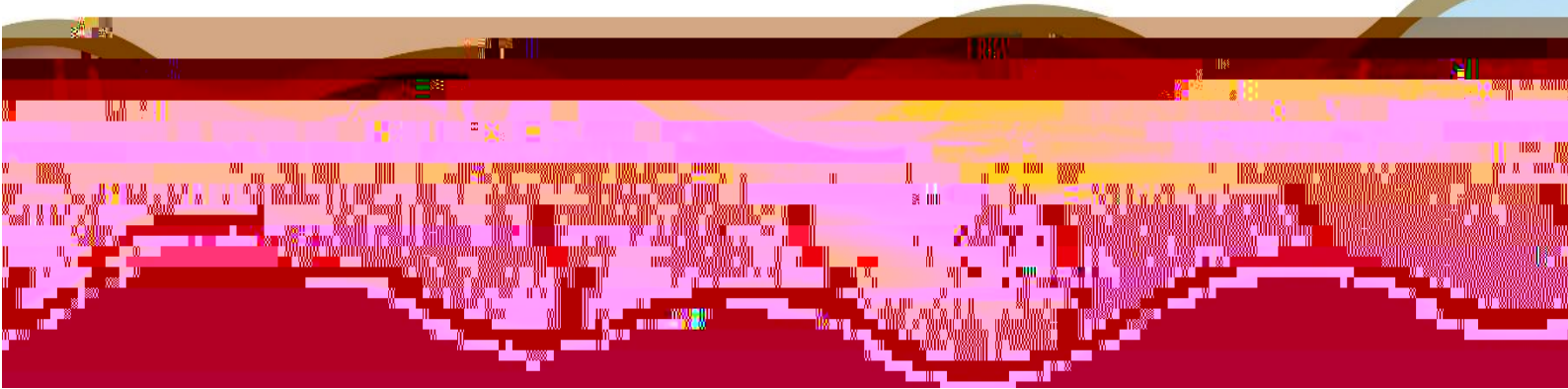
8. Road Map: Implementing the Strategy

Understanding the natural stages of development, phased over a four-year period to 2021:

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

Roadmap Phases

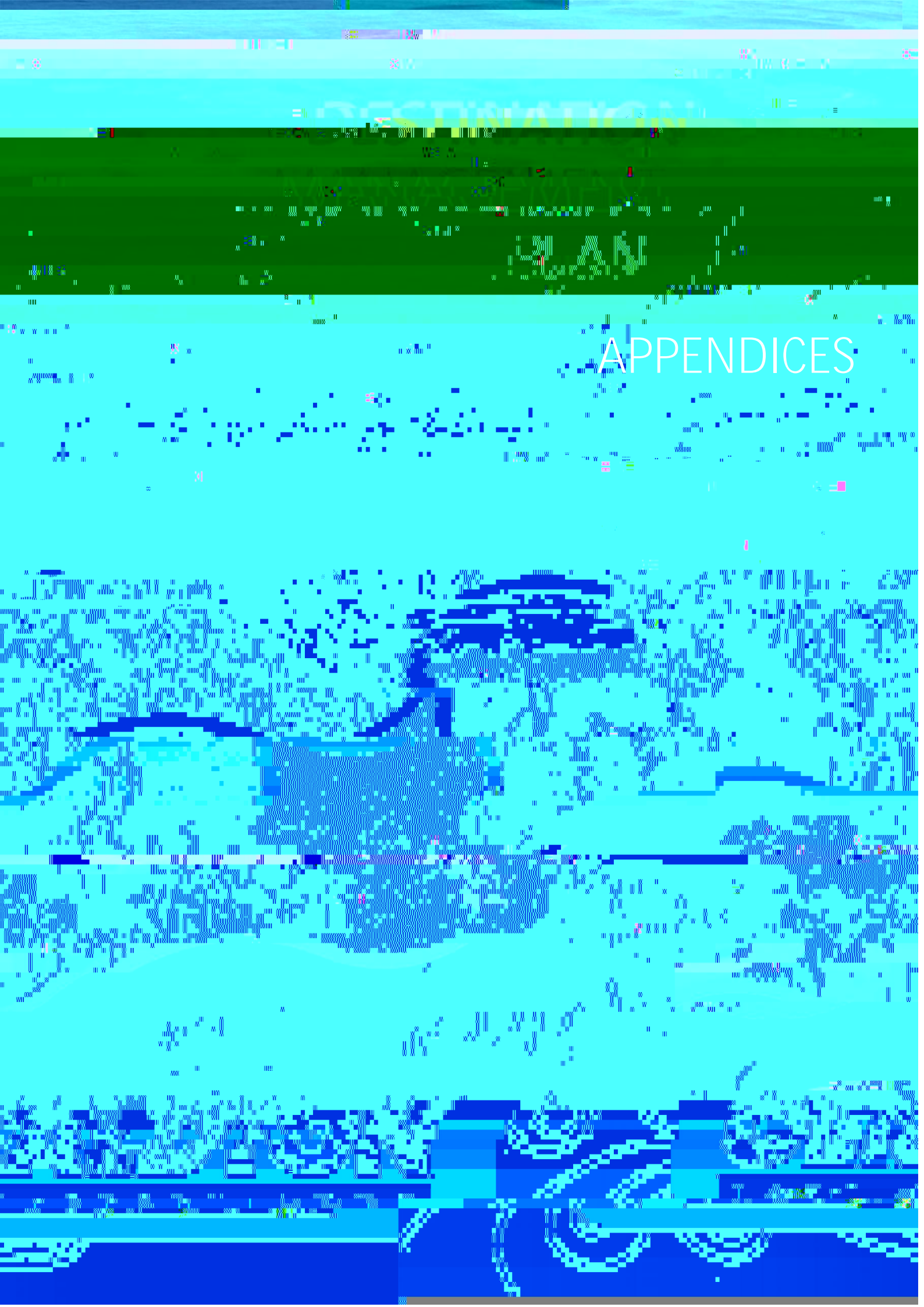
The timing of each of the projects supporting the seven pillars has been prioritised and phased to line up with the broader roadmap; this timing is summarised in Appendix 4



Monitoring and Evaluation

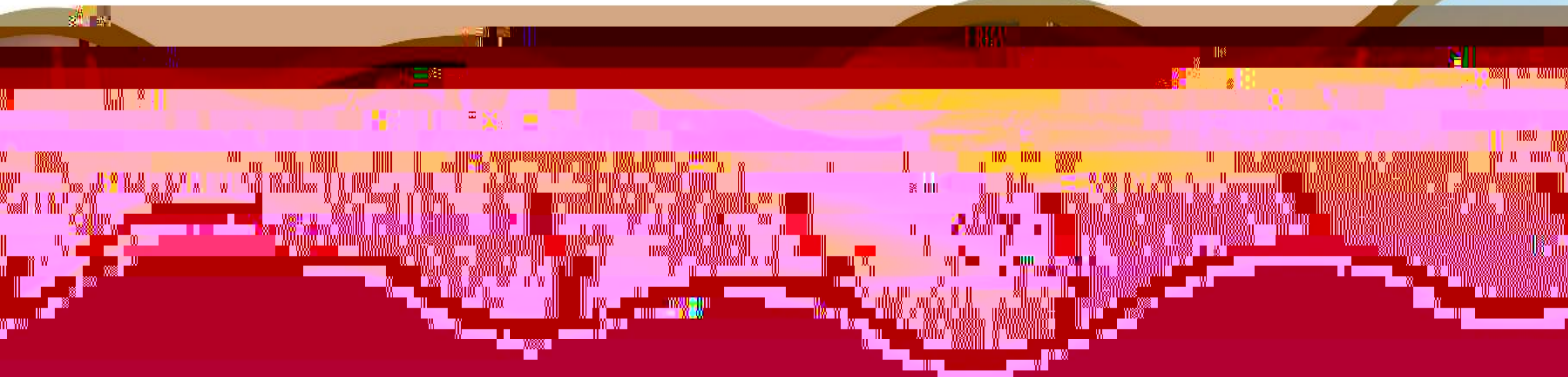
Market Creations recommends the monitoring and evaluation of this plan be undertaken by Progress Midwest in conjunction with the Tourism Industry Leadership Group – as follows:

- undertake a baseline survey of current tourism products and initiatives, in line with the action plan (to



APPENDICES

1. Guide to Best Practice Destination Management, Australian Regional Tourism Network, 2017.
2. Mid West Tourism Development Strategy, Mid West Development Commission/Regional Development Australia, 2014.
3. Australia's Coral Coast Destination Development Strategy (Update), Tourism WA, 2007.
4. Growing Greater Geraldton: A Growth Plan, Growth Plan Partnership/City of Greater Geraldton, March 2017
5. Geraldton-Greenough Tourism Strategy, Mid West Development Commission, 2009.
6. Perceptions of Greater Geraldton, Landcorp (by TNS), 2016.
7. State Government Strategy for Tourism in

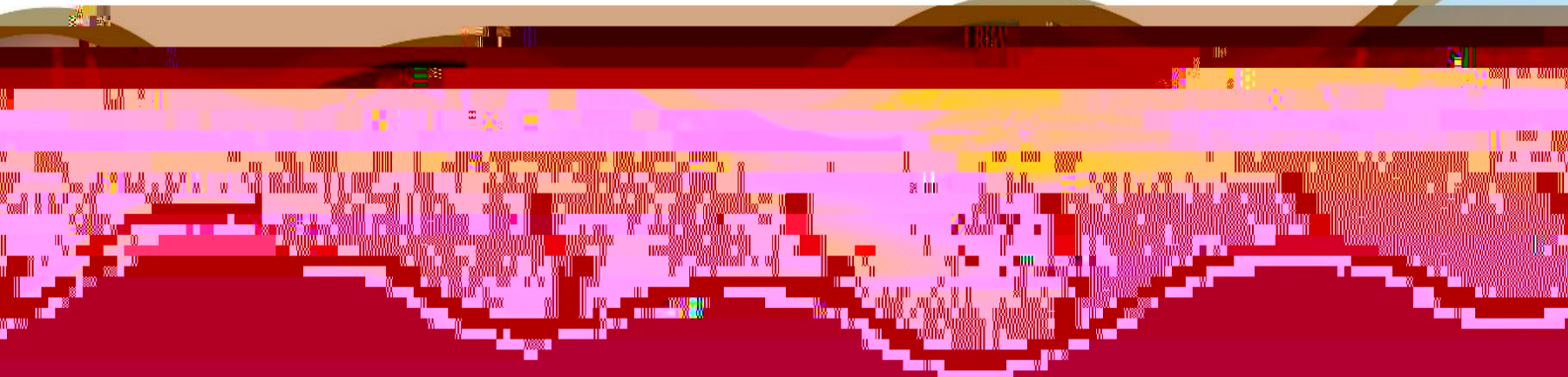


Tourism Industry Leadership Group Presentation - Participants

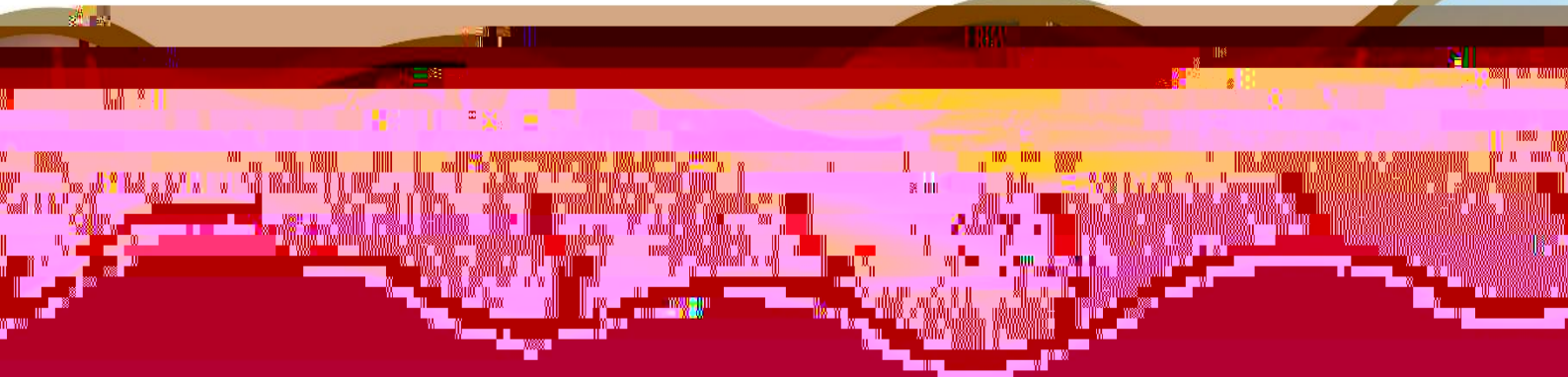
- Geraldton Air Charter
- Shine Aviation
- Dongara Tourist Park
- Ultimate Water Sports
- The Gerald Hotel
- Eco Abrolhos
- City of Greater Geraldton
- Geraldton Visitors Centre (guest)
- Regional Development Australia
- Progress Midwest
- Mid West Chamber of Commerce and Industry
- Broadwater Hotels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

Key Stakeholders Consulted

- Mid West Development Commission
- Tourism WA (aviation, events, indigenous tourism, cruise shipping, marketing) centres, food and wine, domestic
- ° # #
- Department of Parks and Wildlife
- Great Southern Development Commission



TNS conducted a detailed tourism asset review as part o



Active

Including Walks & Trails, Water Sports, Fishing and Adventure Tours
This category crosses-over heavily with the *Nature* category

Accommodation

Including Bed and Breakfast, Hotels, Motels, Caravan Parks, Camping Sites, Private Rentals, Apartments and Backpackers

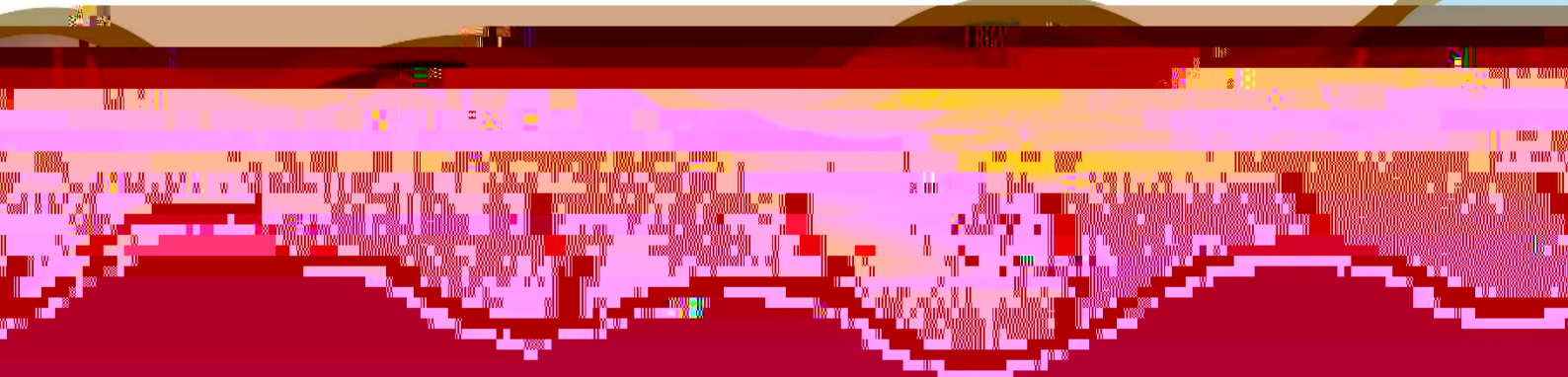
Geraldton's accommodation offering is one of its strengths, particularly relative to the wider Coral Coast region

Accommodation in the northern Coral Coast is not rated well among consumers, particularly in the area of *8* is very strong, relative to other regional WA destinations

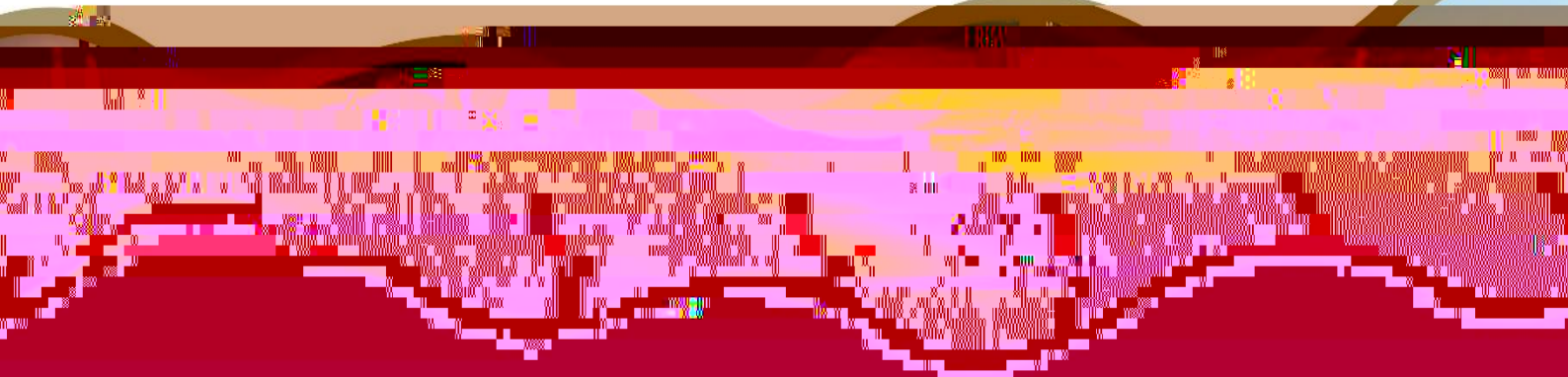
However, consumer accommodation usage and preference data indicates self-catering options (particularly chalets/villas) may be undersupplied, relative to consumer demand

Consumer preferences also indicate a gap in the market for a higher-end, luxury hotel or resort – this may be worth considering in conjunction with the development of the Abrolhos, given that access to the islands is already relatively costly

Retail



Weaknesses

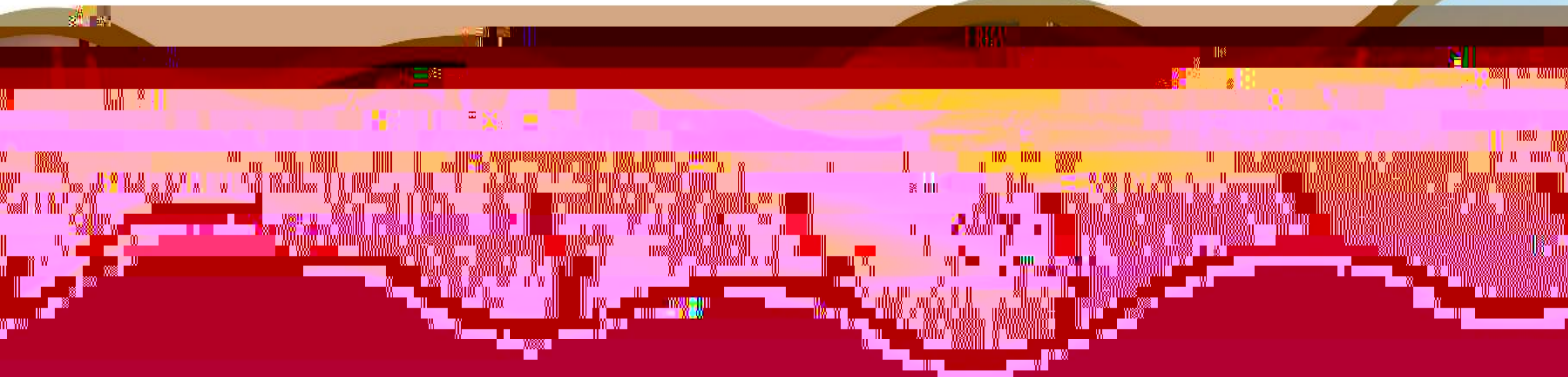


Lack of township activation:

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

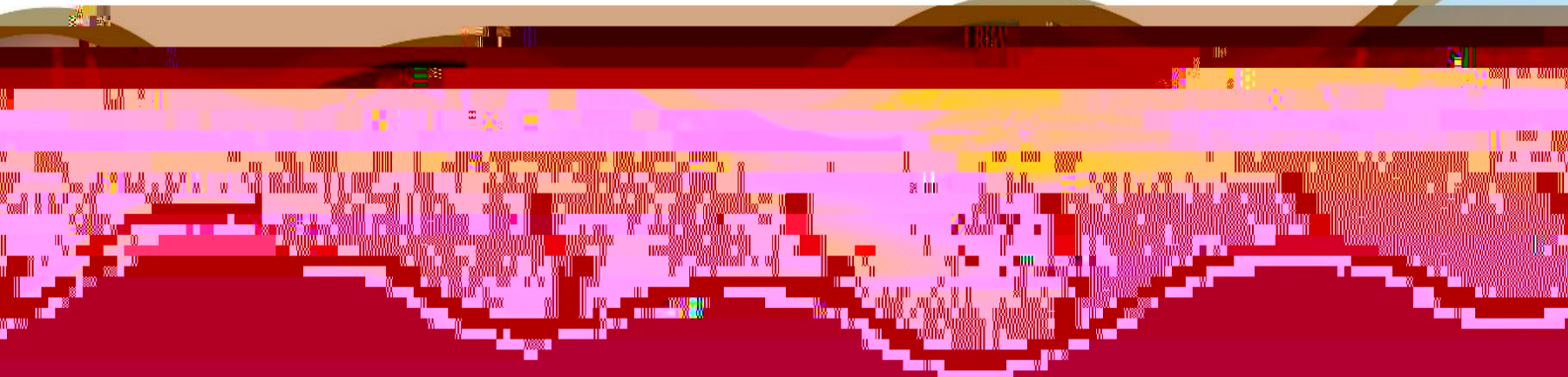
Opportunities

Deve



Establishment of regional cooperation to leverage regional assets:

E.g. Kalbarri Skywalk, Wildflower Way
Regional itineraries



Concept 1: Rock Lobster Retail