BUNBURY-WELLINGTON & BOYUP BROOK REGIONAL TOURISM DEVELOPMENT STRATEGY 2015-2019

Contents

A: 78 Solomon Street, Fremantle Western Australia 6160
P: 08 9335 7382 M: (610) 407 581 481
E: evolvewa@iinet.net.au T /A Marketrade ABN 63351 688958

Abbreviations used in this document include:

ABS	Australian Bureau of Statistics
ASW	Australia's South West
ATEC	Australian Tourism Export Council
BWEA	Bunbury Wellington Economic Alliance
CCI	Chamber of Commerce & Industry
CoB	City of Bunbury
CRC	Community Resource Centre
DPaW	Department of Parks and Wildlife
GPS	Global Positioning System
ITO	Inbound Tour Operator
LGA	Local Government Area
MOU	Memorandum of Understanding
NGO	Non Government Organisation
QA	Quality Assurance
RDA	Regional Development Australia
SRTO	Sub Regional Tourism Organisation
SWDC	South West Development Commission
SW	South West
SWOT	Strengths, Weaknesses, Opportunities & Threats
TCWA	Tourism Council of Western Australia
TRA	Tourism Research Australia
TWA	Tourism Western Australia
VIC	Visitor Information Centre
VCAWA	Visitor Centre Association of WA
WAITOC	WA Indigenous Tourism Operators Council

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EXECUTIVE SUMMARY

BACKGROUND

This regional tourism development strategy involves seven municipalities in South West Australia including the City of Bunbury and the Shires of Dardanup, Collie, Harvey, Capel, Donnybrook-Balingup and Boyup Brook. The purpose of the strategy is to investigate the way forward in regional tourism management, tourism product and infrastructure development and marketing. Identifying how each of the seven municipalities can utilise assets to connect existing tourism product and encourage the development of new experiences on a regional scale. The strategy is to:

- Identify tourism opportunities, priorities and gaps for the Bunbury Wellington and Boyup Brook region;
- Guide seven local government authorities (LGAs) towards unified tourism branding, marketing, governance and product development, and
- Identify recommended infrastructure and product priorities that would complement the Tourism Futures South West and be consistent with the South West Regional Blueprint.

The primary outcomes include an action plan and marketing plan based on consultation and detailed analysis.

VALUE OF TOURISM

Visitation to the region has been increasing in recent years, averaging around 1,738,000 visitors (2010-2013), generating 1,592,000 visitor nights annually. Daytrip visitors are the largest visitor segment representing 75% or approximately 1,307,000 visitors annually, with around 80% coming from the surrounding rural areas. Domestic overnight visitors are the second largest segment representing 23% on average or approximately 403,000 visitors annually, with around 90% coming from Perth and surrounds. International visitors are a comparatively small group averaging 27,000 visitors annually or 6% of overnight visitors but stay longer accounting for 33% of visitor nights.

Tourism is a significant sector within the region. In 2014 visitors to the region generated an estimated $333,000,000 in expenditure, which supported 300+ businesses in tourism, employing around 2,980 FTEs, with around $166,000,000 paid in wages and salaries, contributing to a flow-on effect into the broader economy of approximately $483,000,000. If the region's tourism was successfully 'regionalised' during 2015-2019 and the tourism sector achieved 1.9% p.a. average growth in visitation the economic value to the region would be an *additional* $24,000,000 in visitor expenditure, 216 *additional* FTE jobs, an *additional* $34,000,000 flow-on into the regional economy, and 21 new ventures added to the local economy[1].

TOURISM'S CURRENT STATUS

An assessment of the region's 7-A's of tourism indicates significant capacity that could be improved by reducing duplication and addressing gaps arising from traditional LGA-based approaches.

Accommodation: 192 accommodation facilities in the region, approximately 2,700 bed spaces; 70% are small-scale not suited to groups, 15% are hotels-motels and 15% are caravan/transit parks and campgrounds.

[1] Refer to page 63 for details on tourism multipliers.

Attractions: 341 attractions dominated by wine-hospitality, heritage, events, beach-recreation and nature;

Activities: 300 activities dominated by shops-markets, walk-bike trails, recreation-adventure and aquatic-marine; over 640 activities and attractions making a significant stock of visitor experiences steeped in nature, adventure, heritage and food-wine. This diverse mix appeals to a broad audience.

Awareness: 75 information options for visitors dominated by brochures/maps, websites, information bays and visitor centres; pre-trip planning is well catered but in-field way-finding has gaps and oversights. Regional marketing is in its infancy.

Administration: 7 LGAs, 5 tourism-focused incorporated associations, no sub regional tourism organisation and one regional tourism organisation; tourism is organised and managed on an LGA-basis as seven destinations each having respective marketing materials, visitor servicing and tourism budgets.

Amenities: Many of the region's amenities are of a reasonably high standard however the information available on amenities is irregular and largely incomplete.

Access: The region is accessible year-round by prominent highways and regional roads in addition to the twice-daily Perth-Bunbury train service, regional bus services (daily), Bunbury port hosting cruise ships and Bunbury airfield hosting small aircraft. Access is neither a gap nor constraint in growing tourism.

The main visitor segments visiting the region include visiting friends and relatives, family holiday makers, nomads, international free-independent-travellers, sports-recreation visitors and business-corporate. There is no dominant visitor segment but rather several significant groups that warrant targeted communication to drive year-round growth in visitation across the region.

OPPORTUNITIES

The region has a range of opportunities that can drive growth in visitation and yield in the short-medium term, including:

ADVENTURE-NATURE EXPERIENCES: Australia markets itself to 'Adventure Seekers' and domestic visitors are also outdoor adventure-nature oriented. Investing in the region's adventure and nature 'nodes' will help attract visitors and disperse them across the region.

THEMED ROUTES: Almost all visitors to the region are 'self-drive' and, with short distances between towns and sites, the introduction of themed self-drive routes and maps will guide visitors to places of interest, helping disperse visitors and extend their stay.

EVENTS: Events are significant drivers of visitation to regional areas and with a coordinated, structured approach to events across the region there is scope to increase visitation and stay (yield). The region has an impressive array of events that can be supplemented in strengthening the region's appeal as a prominent event destination.

BRANDING & MARKETING: Establishing a regional 'identity' with a strong brand that can be communicated through regional marketing materials and promotional campaigns will help drive stronger affinity with visitors under a united brand.

TOURISM PACKAGES: The region has over 300 tourism enterprises and collaboration among operators could facilitate a range of packages appealing to the target audiences.

SUB-REGIONAL TOURISM ORGANISATION (**SRTO):** A SRTO as the means to unite operators and drive a 'collaborate to compete' campaign.

CHALLENGES

The region is host to seven LGAs at varying stages in their tourism lifecycle with differing capacities to resource growth in tourism. Similarly, the region's 300+ tourism operators represent a diverse mix of enterprises with divergent aims, capacities and standards. Transitioning to a regional tourism approach faces a number of challenges in addition to market and competitor based challenges.

REGIONAL COLLABORATION: The seven LGAs, five tourism associations and 300+ operators have differing aims and capabilities. Many of the traditional practices will require a degree of change in moving towards a regional collaborative approach to developing and growing tourism. Achieving a consensus on important issues and improvements that build momentum going forward will be challenging.

POSITIONING & BRANDING: When it comes to branding and positioning in tourism markets much of the South West of Australia offers similar climate, geography, topography and visitor experiences. Competing destinations offer similar experiences and very few have genuinely unique points of difference. Becoming a 'standout' region in the minds of visitors has to rely on physical *and* non-physical features (e.g. standards, professionalism, service quality, value, communication, etc). Developing a regional brand that captures the 'soul' of the region, which differentiates it from nearby competing destinations, whilst developing the non-physical features to compete effectively will be a challenge over the medium term.

DISPERSING VISITORS: Traditional LGA-based tourism management has created towns as destinations linked to places of interest within each LGA. Almost all the existing maps, brochures and drive routes encourage this outcome. Yet the region has a very significant collection of sites-experiences, quality roads, quaint rural towns and widely dispersed accommodation. Introducing regional self-drive routes and experience-themed maps that extend across shire boundaries and operators will be challenging in the short-medium term.

MANAGING TOURISM: A primary challenge is to 'regionalise' tourism across seven LGAs whilst bringing operators to a more collaborative approach. The City of Bunbury has expertise and capacity to be a prominent driver in marketing the region but will require support and 'buy-in' from all six LGAs. Proactive tourism operators may benefit from growth in tourism but may not get operator support to achieve the benefits that might otherwise flow across the sub region. Mustering support for collaborative approaches at LGA and operator levels will require leadership and commitment to achieve the required changes and sustainable growth in tourism.

DEVELOPMENT PRIORITIES

Consultations, workshops and analysis identified tourism development priorities that complement the Tourism Futures Southwest and the South West Regional Blueprint whilst focusing investment on the region's strategic advantages. Recommended investment priorities are identified within the strategy including the top ten priorities listed below in rank order:

1. Develop the Collie Motorplex into Western Australia's premier motoring facility for regional WA.
2. Develop the Dolphin Discovery Centre into one of the state's premier dolphin experiences.
3. Support the development of iconic wine tourism experiences, for example, in the Ferguson Valley and prominent wine growing areas across the region.
4. Develop a 5 star hotel in Bunbury.

5. Develop a new marina in Bunbury that includes facilities for cruise ship tenders, dive boats and dolphin cruises.
6. Develop facilities at Black Diamond Pool, Stockton Lake and Lake Kepwari as inland dive sites with swim-throughs, platforms, dive trail and day use amenities.
7. Upgrades to Wellington National Park including walk-in / canoe-in camping opportunities; and a scenic drive loop incorporating Pile rd, River Road, Falcon Rd, Wellington Forest Rd and King Tree Rd.
8. Formalise Gnomesville as a tourist attraction, establishing a boundary around the site and incorporating toilets, picnic facility, pop-up shop, formal pathways, parking, and signage.
9. Develop a 'Summernats' style event that incorporates 'All Things with Wheels' at Collie incorporating rural lifestyle themes into a long weekend event.
10. Install innovative lighting at various locations around Bunbury, lighting up the outside of local buildings, giving impetus to Bunbury's nightlife, events and activities.

STRATEGY

There are fundamental shifts underway that are changing how visitors plan, travel and visit. The drivers of change include global booking systems, mobile devices, social media, climate change (extreme weather), sharing economy (Uber, Airbnb), demography and globalisation (competition). These 'new norms' are impacting on tourism globally as well as the Bunbury Wellington region and in response it needs to proactively 'push' a united, regional campaign to conventional and unconventional visitors. The recommended tourism development strategy to grow visitation, extend stay and increase yield includes the following:

POSITIONING: an adventure-nature getaway where visitors can 'indulge' in high quality boutique services across the region.

VISION: a leading nature and adventure getaway with quality boutique experiences in food, wine, culture and hospitality that inspires people to visit and indulge again and again.

GOALS: 559,000 overnight visitors and 2,078,000 visitor nights p.a. by 2030.
1,686,000 day trip visitors p.a. by 2030.
$231,481,000 p.a. overnight visitor expenditure and $193,867,000 p.a. day trip expenditure by 2030.
$425,348,000 visitor expenditure across the region by 2030.
Sustainable medium term growth in visitation of 1.9% p.a. (annual average).

STRATEGY: Main elements of the tourism strategy include:

1. **Tourism Infrastructure**. In parallel with existing development programs the *recommended* tourism development priorities have potential to significantly enhance the range and scope of visitor experiences on offer.
2. **Positioning.** The region is well placed to be a leading adventure-nature getaway within close proximity to Perth supported by quality, boutique experiences in wine, food, culture, heritage, and shopping.
3. **Marketing**. An integrated marketing strategy is proposed incorporating branding, advertising-promotion (in collaboration with ASW); visitor information consolidated into 'activity-experience based' maps and a regional planner; a regional website, App and social media to reach 'tech-savvy' visitors; and progressively fewer visitor centres supplemented with information nodes.

4. **Product Development & Events**. Development of themed self-drive routes (maps) for wine, food-produce-hospitality, mountain biking/cycling and hiking, culture-heritage and nature-adventure, extending across the region; new events such as bi-monthly music-cultural performances at selected sites, a food event focused on the Harvest Highway (Indulgence Trail), an 'all things wheels' event over a long weekend; canoe trails linked to canoe-in camp sites and the development of inland diving sites.
5. **Digital.** A greater regional presence online initially through mass-market utilities (e.g. Google, Facebook, YouTube, TripAdvisor, Everytrail, etc) whilst building functionality online via a website, app and Wi-Fi hotspots that provide visitors with the digital tools to plan, communicate, way-find and share their experiences online.
6. **Standards**. In aiming for a competitive advantage, encourage high standards of service and professionalism among tourism operators; increasing their capacity to offer 'packaged' and 'bookable' product; increasing operator capacity to service cruise ship visitors, tour groups and high yielding free independent travellers; and in the process uniting operators in 'collaborating to compete'.
7. **Governance**. A parallel approach to manage tourism. LGAs collaborating in developing regional marketing materials and supporting applications to develop regional infrastructure priorities. Operators collaborating in developing packages and co-operative marketing campaigns to leverage off new self-drive routes, events and themed marketing whilst mustering support for a sub regional tourism organisation.

ACTION & MARKETING PLAN

The action plan addresses core areas of the strategy including marketing materials, events, packaging, infrastructure, partnerships, governance and standards.

The regional tourism marketing plan focuses on branding the region and creating a profile for the destination, growing visitation and dispersing visitors. The plan focuses on day trips, overnight domestic visitors and international visitors.

The strategy is premised on the region being seven LGAs with unique identities, differing tourism capacities, significant tourism product and a range of operators of varying scale and standard. The strategy aims for the region's tourism industry to compete more effectively based on collaboration in becoming a branded regional destination that is:

- **VISITOR-CENTRIC**, putting visitors first and taking action that serves and benefits visitors foremost. "*Causing visitors to Experience Better*".
- **COLLABORATIVE**, drawing upon the wisdom of community, integrating and empowering operators and the community. "*Collaborating to compete better*".
- **REGIONALISED**, taking action that elevates the region, making it a leading destination. "*Making dispersed places to visit and enjoy*".
- **PROFESSIONAL EXCELLENCE**, raising standards that exceed expectations, delivering more than competitors. *"A differential advantage benefiting visitors"*.
- **STRATEGY-DRIVEN**, endorsing long term aims, taking prescribed actions and staying committed. "*Choosing to act on opportunity and optimism*".
- **INNOVATIVE**, prepared to discard 'old ways', pushing the boundaries and being bold in shaping the future. "*Leaning into the future*".

These elements are the essence of this tourism development strategy and are captured through the actions and proposed initiatives.

BUNBURY WELLINGTON & BOYUP BROOK REGIONAL TOURISM DEVELOPMENT STRATEGY

VISION:

A leading nature and adventure getaway with quality boutique experiences.

GOALS: by 2030……

559,000 overnight visitors

1,686,000 day trip visitors

$231,481,000 overnight visitor expenditure

$193,867,000 day trip expenditure

$425,348,000 visitor expenditure

1.7% p.a. growth in visitation

ACHIEVED BY BEING:

Visitor Centric.

Collaborative.

Regionalised.

Professional excellence.

Strategy driven.

Innovative.

RECOMMENDED ACTIONS

Adopting regionalised marketing material.

Creating themed self-drive routes.

Increasing adventure-nature experiences.

Structuring, expanding & leveraging the events program.

Experience-themed visitor information.

Raising standards to par excellence.

Operators collaborating through packages, promotion & SRTO.

Progressivley fewer visitor centres as visitor information goes digital.

Co-operative promotion with ASW.

LGAs & SRTO co-managing tourism.

An integrated marketing campaign - print, web, digital and face-to-face.

DEVELOPMENT PRIORITIES

1. Develop Collie Motorplex into regional WA's premier motoring facility.
2. Develop the Dolphin Centre into WA's premier dolphin experience.
3. Develop iconic wine tourism experiences for example, in Ferguson Valley.
4. Develop a 5-Star hotel in Bunbury.
5. Develop a marina in Bunbury for cruise ship tenders, dive boats & dolphin cruises.
6. Inland dive sites at Black Diamond Pool, Stockton Lake and Lake Kepwari.
7. Upgrades to Wellington National Park – canoeing, camping, scenic drive, biking.
8. Formalise Gnomesville as a tourist attraction.
9. A 'Summernats' style event 'All Things with Wheels' at Collie.
10. Innovative lighting on buildings across Bunbury.

SECTION 1 - PRELUDE

1.1 INTRODUCTION

The Bunbury Wellington and Boyup Brook Tourism Development Strategy was an initiative of the Bunbury Wellington Group of Councils[2] with support from the South West Development Commission, Regional Development Australia, Tourism WA and Australia's South West. The objective of the Tourism Development Strategy was to identify tourism opportunities, priorities and gaps for the Bunbury Wellington and Boyup Brook region (*hereafter referred to as Geographe or 'the region'*).

A primary objective of the Strategy was to identify actions and recommendations that inform future development and investment, complementing existing regional development plans to bring about improvement in tourism standards, governance and visitation.

The outcomes include a tourism strategy identifying investment priorities along with an action plan with prioritised recommendations and an operational marketing plan that increases opportunity for the region's tourism sector and improves the quality, diversity and appeal of the region.

The tourism development strategy was developed by the following:

- Consultation across the region including one-on-one and phone interviews and eight workshops to identify priorities and approaches to regionalise tourism;
- Analysis of trends and competitive influences, SWOTs and Gaps, in determining what was required to maximise the use of current tourism assets in accommodating growth,
- Identifying the challenges facing tourism in the region for the next 5-10 years;

1.2 BACKGROUND

The Geographe region is host to a comparatively unique landscape consisting of five significant rivers with scenic valleys, five major dams, around 70km of coastline, two national parks, swathes of State forest and picturesque rural land and the largest City in the south west. The region's dairy, wine and horticultural industries are significant and gaining prominence in attracting food-wine inspired visitors. Future prospects for the region are linked to population growth, rising global interest in nature and food-wine tourism experiences and more 'getaway' holidays nationally (i.e. the region is 1.5hrs drive south of Perth).

Since the 1980s the region's tourism sector has coasted along in the shadows of agriculture, horticulture, mining and resources, and urban/rural growth. The region's tourism sector is a mix of corporate-business focused enterprises, seasonal holiday-focused enterprises and lifestyle-hobby driven enterprises and this translates into varying standards of service, quality, capacity and viability. Since the late 1970s residents from Perth and surrounding regions have tended to holiday 'down south' in the more southerly 'Capes' region, attracting considerable investment and development, which has contributed to the Bunbury Wellington's comparatively lower growth in tourism. The annual migration of self-drive intrastate and interstate travellers to and from WA's north in winter (e.g. Gascoyne, Ningaloo and Kimberley) and south in summer has not translated into a captive visitor market. The region is challenged by having no distinct name or brand embedded in the minds

[2] Including the City of Bunbury and the Shires of Harvey, Collie, Dardanup, Boyup Brook, Capel and Donnybrook-Balingup.

of visitors[3], no iconic attraction, fragmented promotion of towns and shires and operators working independently rather than co-operatively. This is largely due to tourism being managed and marketed as seven individual municipalities. A central aim of this project was to guide seven LGAs – comprising Geographe and part of the Blackwood Valley – collaboratively towards a unified tourism brand, marketing, governance and product development.

The strategy was developed during January to May 2015 through desktop analysis, consultation, site visits and strategy review. The desktop analysis examined published reports (refer to the bibliography), visitor data and regional marketing material (maps, brochures, planners). Consultation involved a multi-channel approach. Phone consultations were undertaken with over 50 stakeholders from the region, surrounding areas and Perth. Face to face consultations were held with approximately 20 stakeholders from across the region, some of which were undertaken during a 7-day tour of the region. Eight workshops were held attracting approximately 150 participants. A web page was used to communicate project updates, provide documents to inform stakeholders and to solicit feedback during the project. Feedback was received via email following the Background Paper and Interim Report and after the workshops. A draft strategy was issued to solicit feedback from the Project Steering Group and stakeholders in refining the final strategy.

1.3 PLANNING CONTEXT

To understand the planning context of this strategy and to identify priorities that align with Regional, State and National tourism priorities, a review of existing plans and strategies was undertaken. The graphic below highlights the roles of government and regional tourism organisations whilst also helping to outline the context and purpose of this strategy.

TOURISM AUSTRALIA/AUSTRADE

- **Promotes Australia to overseas markets attracting international visitors to Australia & all States; Brand 'Australia' (Tourism Australia)**
- **Helps foster a sustainable tourism industry & increase the economic benefits to Australia from tourism. (AusTrade)**

TOURISM WESTERN AUSTRALIA

- **Promotes WA to Australia & overseas, attracting interstate & international visitors to WA & across the State; 'Experience Extraordinary' brand.**
- **Helps foster events throughout WA & supports the development of significant tourism infrastructure across WA.**

AUSTRALIA'S SOUTH WEST

- **Promotes the South West to WA, Australia & overseas, attracting visitors to the South West, increasing tourism yield; 'Australia's South West' brand.**
- **Partnerships closely with Tourism WA in promoting the region.**
- **Promotes the region's tourism services, facilities, events and value.**

GEOGRAPHE TOURISM SUB REGION (*PROPOSED*)

- **Promotes the sub-region to the South West, WA, Australia & overseas, attracting visitors to the region; 'Geographe' brand (*assumed name*).**
- **Partners closely with ASW & Tourism WA in promoting the region.**
- **Promotes the region's tourism services, facilities, events and value.**

[3] The Constitution of Australia's South West lists Bunbury, Collie, Donnybrook–Balingup (Donnybrook district), Capel, Dardanup and Harvey as the 'Geographe' sub-region and lists Donnybrook–Balingup (Balingup district) and Boyup Brook as part of Blackwood River Valley. Balingup and Boyup Brook participate in the Southern Forests Tourism Alliance.

The purpose of this tourism strategy is to provide recommendations as to how the seven LGAs can utilise assets to connect existing and potential tourism product and encourage the development of new experiences to grow visitation and tourism sustainability, addressing the areas of tourism management, marketing and product / infrastructure development. The strategy aims to 'synthesise' the tourism approaches of the seven LGAs in a way that delivers a collaborative, regional approach to grow tourism visitation, investment, employment, value and sustainability.

Tourism 2020 (Australia)

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

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

Initiatives relevant to this tourism development strategy include rollout of the NBN, uptake of the tourism E-kit, business skills training for Aboriginal people, the Enterprise Connect program, encouraging experience-based product development, and fostering linkages between tourism and the arts.

2020 Tourism Strategy (Western Australia)

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

1. *REGIONAL TRAVEL. Outcome: Increase visitors to regional WA with Tourism WA supporting infrastructure in regional WA;* encouraging Australia's best regional events calendar; improved caravan, camping and self-drive experiences; Extraordinary regional experiences, including nature-based, culinary and cruise shipping experiences.

2. *ABORIGINAL. Outcome: Provide every visitor with the opportunity to have an Aboriginal tourism experience:* facilitate and support opportunities for access to land and tenure for the development of tourism; support industry in interfacing with government, maximising involvement in government tourism programs; opportunities and pathways for Aboriginal employment in tourism and hospitality, including through traineeships and cadetships.

South West Regional Blueprint

The 2014 South West Regional Blueprint's purpose is to put clarity into development of the South West region by identifying key imperatives that make the greatest difference. The Blueprint states "the strategic opportunities for the SW Tourism sector are to build on national and intrastate visitation with an expansion into the growing South East Asian markets, India, China, and the Middle East" (p. 28). Increased visitation is anticipated through the following steps:

- Improvement in iconic tourism infrastructure – things to see and do;
- Coordinating international standard events; and
- Wholesale tour packaging based on Tourism WA's "Experience Extraordinary" campaign.

The Blueprint highlights a range of issues and opportunities facing the region's tourism sector including:

- Investment in mountain biking, cycling and walk trails;
- Packaging product through collaboration so that South West product can be sold overseas;
- Providing access to high capacity broadband to drive market access and interactivity.
- Fast train links between Perth and Bunbury, linking commercial, tourism and retail options in both directions.

The 2014 Blueprint sets out strategies for tourism in the South West including:
YEARS 1-3

- Complete a series of wholesale package strategies to support inbound operations.
- Attract foreign investment in inbound travel tours and tourism accommodation.
- Attract a new 5 star hotel in Bunbury.
- Design and implement an overseas visitor-ready program for the South West tourism sector which includes appropriate signage, language materials and mapping.
- Promote culinary tourism linked to origin brands such as Southern Forests.

YEARS 3-15

- Complete development of the Collie Motorplex.
- Complete cruise ship facilities at Bunbury, Busselton and Augusta.
- Complete mountain bike trails in accordance with the South West Mountain Bike Plan.

Tourism Futures Southwest 2013-2018

The 2013-2018 Tourism Futures Southwest is an action plan with a focus on infrastructure, events and packaging. The plan identifies a range of tourism infrastructure priorities including:

- Country Music and Arts Centre for Excellence, Boyup Brook; a facility to attract musicians, artists and the public ensuring sustainability of the annual Country Music Festival; High priority.
- Tuart Forest National Park; Master Plan with trails and amenities; Medium priority.
- Regional telecommunications infrastructure; to improve internet and mobile phone coverage; high priority.
- Lake Kepwari; a mine void, potentially a recreational lake with boat ramp, picnic facilities, etc; Medium priority.
- Lighting up Bunbury; lighting the outside of local buildings, making Bunbury an interesting and vibrant destination; Medium priority.
- Donnybrook Railway Heritage Precinct; develop a disused rail reserve into a multi-purpose civic centre; Medium priority.
- Tourism signage; improve directional and interpretive signs at tourism attractions; medium priority.
- Indigenous Tourism; Develop partnerships, improve the range of Indigenous tourism experiences, and promote Indigenous tourism experiences; medium priority.
- Improve the distribution of tourism information via Smartphone and web-based applications; medium priority

Aboriginal Tourism Strategy (2013-2018)

WA's Aboriginal Tourism Strategy (2013-2018) aims to facilitate a collaborative approach to the ongoing development of a sustainable, credible and visible Aboriginal tourism industry. Initiatives relevant to this strategy include:

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

As at 2015 there were few[4] Aboriginal tourism experiences in the region although there are several initiatives being pursued and/or awaiting development centred on Roelands.

Caravan and Camping Action Plan (2013)

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

- Implementation of marketing activities, training programs and accreditation to lift industry standards;
- investigation and development of camping facilities on Aboriginal lands that encourage Aboriginal participation and employment, and
- Upgraded campgrounds at Lake Brockman and Potter's Gorge.

The Parks For People program is part of the Caravan And Camping Action Plan, a four-year Statewide program that includes investment in the Geographe area as follows:

- New campgrounds in Wellington NP (i.e. Potter's Gorge) and an upgrade of visitor facilities within the National Park;
- Upgraded campgrounds at the Lake Brockman Tourist Park (leasehold) and a new campground in the Logue Brook area;
- New and improved visitor facilities in Leschenault Peninsula Conservation Park; and
- Improved infrastructure and services at lease areas such as Wellington Forest Cottages.

Australia's South West Destination Development Strategy (2007-2017)

Australia's South West Destination Development Strategy (2007-2017) sets out regional tourism priorities. The Strategy identifies four iconic experiences in the Bunbury Wellington and Boyup Brook region that are considered market ready and appropriate to leverage in growing visitation including;

- Beaches, coastline and surf (Bunbury, Capel, Harvey)
- Bunbury Dolphin Discovery Centre (Bunbury)
- Dive wrecks, for example, The Lena (Bunbury)
- Wineries (Ferguson Valley, Capel, Harvey, Donnybrook, Collie).

The Destination Development strategy identifies a range of iconic or important opportunities to leverage across the South West including:

- Food and wine indulgences. Aimed towards couples, groups of friends and food and wine enthusiasts.

[4] Ngalang Wongi Aboriginal Cultural Tours operates from Bunbury.

- Short getaways with a diversity of attractions. Aimed towards intrastate travellers.
- Romantic escapes. Aimed towards couples seeking out-of-the-way romantic breaks.
- Quiet, family-based holiday breaks. Aimed at families seeking uncrowded family breaks.
- Secluded and scenic nature based discoveries. Aimed at empty nesters and nature enthusiasts.
- Historical discoveries and inland pioneer experiences. Aimed primarily at empty nesters.

The Strategy outlines tourism development initiatives for the region including:

- Bunbury timber jetty: restore the historic Bunbury timber jetty. Stage 1 - Restore jetty. Stage 2 - Build the Bunbury Timber Jetty Discovery Centre.
- Walk trail from Harvey tourism precinct to Harvey Dam, Gibbs Pool, and Amphitheatre; develop a walk trail, including a suspension bridge over the Harvey River, taking in the escarpment of the Harvey River and surrounding environment.
- Bunbury International Motor Sport Complex: develop an international standard motor sports complex with associated facilities.
- Big Swamp Wildlife Park (Bunbury): Develop "Big Swamp" as a nature based tourism attraction.
- Three Waters Centre, Bunbury: Build the Three Waters Centre in Bunbury Tourism Precinct, Koombana Bay, to house a new visitor centre, Regional Art Gallery and Regional Museum.
- Charter boat jetty facilities (Bunbury): Provide jetty facilities for dolphin watch, dive and charter boats close to the Dolphin Discovery Centre.
- Bunbury Convention and Exhibition Centre: Investigate the feasibility of a convention and exhibition Centre to capitalise upon the increase in business tourism.
- Bunbury outer harbour: Move outer port operations to inner harbour. Stage 2 - create an area for charter boat facilities, residential housing and assorted recreational activities. Also potential to include additional commercial opportunities.

Western Australian Trails Strategy (2009-2015)

The Western Australian Trails Strategy (2009-2015) is not an implementation plan but rather a collection of high-level principles, direction and outcomes from which local-regionalised plans and strategies will evolve. The core strategies (principles) include:

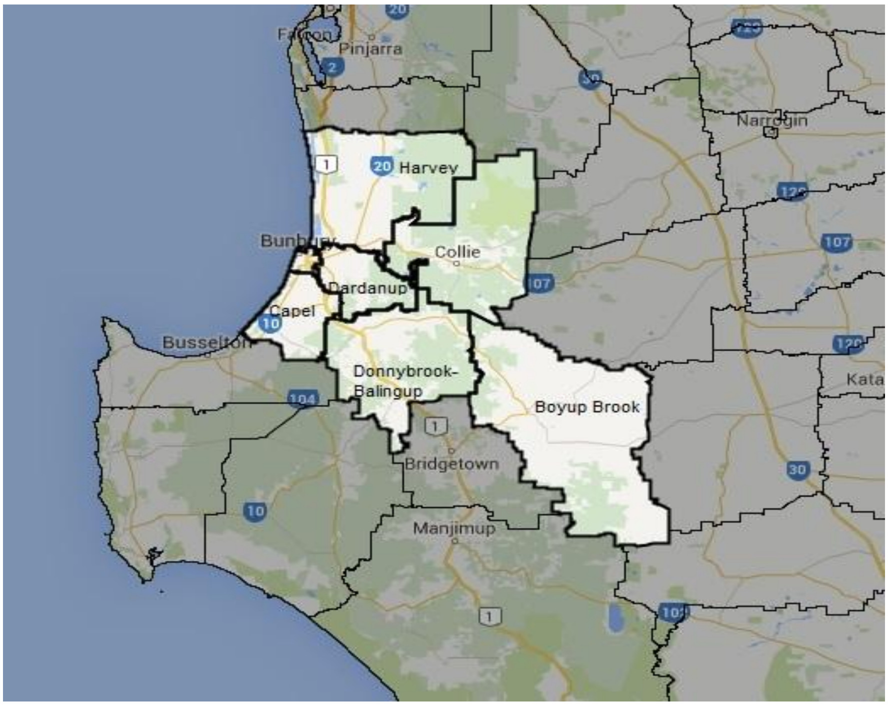
- Build community capacity to develop, construct, maintain and promote trails.
- Encourage better links with segments of the community
- Encourage appropriate user access.
- Improve the sector's governance model.
- Link Western Australia to other trails movements and trends.
- Explore different funding models for trails maintenance.
- Promote research on trails usage, benefits and demand.
- Promote the nature and value of Western Australian trails, and
- Develop and implement educational programs.

Western Australian trails attract a diverse range of users including photographers, walkers, cyclists, mountain-bikers, canoeists, horse riders, off-road drivers, motorcyclists, snorkelers, divers and nature enthusiasts. The strategy highlights the challenge of developing and maintaining trails across the entire State whilst also appealing to the broader range of trail users.

The South West Mountain Bike Master plan (2014) identifies five major locations for biking across the south west including Dunsborough's coastal experience, Margaret River's gourmet experience, Nannup's rolling hills experience, Pemberton's tall trees experience, and Wellington's river valley experience. Each location is approximately 2hrs drive apart encouraging overnight stays across the region. Four locations are of 'national significance' including Wellington (Collie) where 80-100km of trail is proposed as a high priority project within the short term. Bunbury, Donnybrook, Harvey and Balingup are of 'local' significance and slated for 20km trails of moderate priority within the medium-long term. The Master plan sets out recommendations for facility, governance, event and promotion development to support a world-class trail network across the south west to grow intrastate, interstate and international patronage of this fast-growing adventure/nature based activity.

TOURISM PLANNING IN THE BUNBURY WELLINGTON AND BOYUP BROOK REGION

The region's seven LGAs (shown right) maintain *Community Strategic Plans* and *Corporate Business Plans* to guide development within their respective LGAs, including tourism development. Major tourism initiatives planned by the seven LGAs during 2014-2023 are outlined below and supplement the *regional tourism priorities* recommended in this strategy (i.e. may be developed in parallel).



Capel's 'town square precinct' redevelopment is to accommodate markets, events and an amphitheatre as well as a traveller friendly area with bus, caravan and car parking, a public toilet, sullage point and picnic facilities. Redevelopment of Fettler's Park in Boyanup, developing overnight stays at Ironstone Gully Falls, and upgrading hiking/bridal trails in the Ludlow Tuart Forest.

Boyup Brook aims to further develop the music park, implement streetscape improvements to the main street, encourage business owners to renovate shop frontages, upgrade facilities at the caravan park (e.g. a new camp kitchen and BBQ area, shade trees in the overflow area), and develop nature based attractions and activities such as wildflower walks and bike trails.

Collie aims to develop amenities at Lake Kepwari, develop a Drag Strip at the Collie Motorplex, support DPaW in upgrading caravan and camping facilities at Stockton Lake and Glen Mervyn Dam, support the Department of Mines and Petroleum to develop day use facilities at Black Diamond pool, develop a Transit Park at Minninup Pool, and continue to improve services and infrastructure such as the new art gallery and tourism hub.

Dardanup aims to support the development of tourist accommodation in the Dardanup and Eaton-Millbridge sub-regions, develop Gnomesville as an official tourist attraction with associated infrastructure, develop a serviced overnight caravan stop in Dardanup, investigate a restaurant/café being developed along the Collie River foreshore, and seek to change the purpose of the Ferguson Road Reserve to recreation enabling tourism development.

Donnybrook-Balingup has identified priorities in promoting the natural environment and local producers, increasing amenity and access to the forests and rivers, include Heritage Places in the development of tourism, and to upgrade existing walk-bike trails and selectively add trails over the medium term.

Bunbury aims to develop the visitor experience year round by improving the range of water based recreation experiences, establish a water playground, and create a tourist hub incorporating multiple activities and experiences. It also plans to continue increasing its accommodation capacity by attracting a new 4-5 star hotel-resort facility, encourage refurbishment of existing tourist accommodation facilities and encourage residential dwellings to be used for short stay. The Bunbury Marine Facilities Plan is supported including the Dolphin Discovery Centre Master Plan and potentially a multi-purpose facility for a visitor centre, museum and noongar cultural centre. Bunbury also aims to identify and support events that attract visitors to Bunbury.

Harvey aims to develop a signage, information and way-finding strategy; to more effectively promote the Shire's town sites as caravan friendly; and to collaborate with partners to promote regional tourism initiatives. Development priorities include improve the accessibility and range of amenities and infrastructure at the Leschenault Estuary, complete the Foreshore Development Strategy at Myalup, develop the walk trail from the tourism precinct to Harvey Dam and upgrade parking at the Harvey Dam amphitheatre to enable larger events.

LONG TERM TRENDS

The Bunbury Wellington and Boyup Brook Tourism Development Strategy adopts a five-year timeframe from 2015-2019. Long term tourism trends that are expected to influence tourism across Western Australia and the region during this period are outlined below.

- **Rising environmental awareness:** concern for impacts on the natural world, an ever-increasing 'green shift' towards environmentally aware practices, products and services, favouring undisturbed nature-based tourism experiences, low-no impact visitor activities and conservation-driven developments.
- **Sustainable tourism:** travelling responsibly, visiting sustainable environments, authentic experiences and tourism that delivers benefits for locals and the environment; growth in social enterprises as more travellers value renewable-recyclable-sustainable approaches to life (e.g. fair trade, carbon offsets, voluntourism, pop-up markets, sharing economy, etc).
- **Ageing population:** Australia's population of over 65's will increase 60% from 3.3 million in 2013 to 5.3 million in 2028 and they will be comparatively healthier, wealthier, more active, and more mobile. Need to better understand their desires, preferences and motivations as they take to the roads in 4WDs, caravans and RVs seeking out places to 'escape' and socialise as part of the 'silver tsunami' of nomads sweeping across Australia (to 2028).
- **Owning a home on wheels:** 528,000+ registered RVs in Australia, 22,000+ new RVs built in Australia annually, 90,000 RVs on Australian roads at any one time; the number of sites-bays in Caravan Parks has been decreasing nationally; site shortages, 'feral' camping, RV Friendly towns-destinations and overflow/transit facilities are on the rise;

- **Changing spending patterns:** rising aspirations and expectations; visitors expecting premium quality and service at affordable prices as a minimum; consumers buying in shops *and* online with social/digital media influencing their spending patterns.
- **Experience economy:** people valuing experiences over possessions; using experiences to express their social status; travel's value derived from the experience (i.e. the memories, feelings and highlights-lowlights); social and online media capturing travel experiences, profiling destinations, influencing travel plans and setting visitor expectations.
- **Increased urbanisation worldwide**: world population steadily increasing, a burgeoning middle-class, sprawling urbanisation, larger and more congested cities; increased pressure in our daily lives motivating travellers to 'escape' through holidays; the rise of holidays that immerse visitors in self-discovery, education, culture and nature.
- **Carbon economy**: climate change and global warming becoming all-pervasive; changed weather patterns and extreme weather events; awareness of fossil fuel impacts and renewable energy on the rise; growth in 'green' tourism raising the value placed on biodiversity, 'experiencing' untouched nature, ecotourism and treading lightly.
- **Sharing Economy**: closely linked to social media, democratisation of communication and sustainable approaches to life; visitors sharing rooms, bikes, cars, facilities and experiences; smart devices facilitating the 'sharing economy' across age groups; steadily disrupting conventional business models and enabling visitors to customise their trip experiences.
- **Asia-Pacific Tourism:** steady growth in inbound/outbound travel across Asia-Pacific; growth in Asia's intra-regional travel bides well for growth in arrivals to Western Australia; culture, food, nature and leisure are among primary motivators of Asia-Pacific travellers.
- **Mobile technology:** Smart phones-devices becoming ever-smarter utilising Bluetooth, NFC, GPS, image/voice recognition, apps, Wi-Fi, satellites, etc; visitors and travellers of all ages becoming proficient in using smart devices to do almost anything anywhere 24/7.

VISITOR SERVICING

A Sustainable Future For Visitor Centres in Western Australia is Tourism WA's response to the Haeberlin Consulting study (2014). The report's findings support similar studies that visitors who use visitor centres tend to stay longer and spend more in a region. However, too often visitor centres compete with local travel agents by focusing on bookings and the sale of product, rather than face-to-face servicing. Similarly, *local* destination marketing undertaken by visitor centres often duplicates a primary role of Regional Tourism Organisations (e.g. ASW). Whilst local governments have a community service obligation to provide information about their area, visitor centres are not profit making but do contribute to the economic value of tourism. Therefore local governments *and* tourism operators should be partly responsible for funding and sustaining visitor centres. Tourism WA only promotes accredited operations including accredited visitor centres. Hence Tourism WA encourages visitor centre accreditation, however, visitor centres argue that accreditation adds to their costs and restricts their ability to operate sustainably. National guidelines on visitor centre accreditation are currently being reviewed. To enhance WA's visitor centre network, a centrally coordinated (i.e. TWA, TCWA, VCAWA) promotional strategy has been suggested by TWA to help raise the profile and patronage of visitor centres and possibly reduce their cost base whilst growing visitor stay and spend in a region. However, the fact remains that patronage of visitor centres across Australia has been steadily declining since mid-2000's when the internet, online services and mobile technologies began to flourish and became entrenched in everyday lives. The sustainability of a visitor centre remains closely linked to the number of visitors 'through the door' and their capacity to offer a range of commercial services to visitors, tourism operators and the community.

SECTION 2 – REGIONAL TOURISM DEVELOPMENT STRATEGY

2.1 VISION

The proposed vision statement for the region is:

A leading nature and adventure getaway with quality boutique experiences in food, wine, culture and hospitality that inspires people to visit and indulge again and again.

2.2 GOALS

Long term goals for the Regional Tourism Development Strategy are to achieve:

- 559,000 overnight visitors and 2,078,000 visitor nights p.a. by 2030.
- 1,686,000 day trip visitor's p.a. by 2030.
- Average length of stay of 4.0 nights by 2030
- $231,481,000 p.a. overnight visitor expenditure and $193,867,000 p.a. day trip expenditure by 2030.
- $425,348,000 visitor expenditure across the region by 2030.
- Sustainable medium term growth in visitation of 1.9% p.a. (annual average).

Medium and long term goals are compared below with past results (2010-2013 average) to highlight the region's potential gains from a regional approach to tourism development.

FOCUS	PAST RESULT (2010-2013 average)	FUTURE TARGET *
Daytrip Visitors	1,307,000	1,686,000 by 2030
Overnight Visitors	430,000	559,000 by 2030
Visitor Nights	1,592,000	2,078,000 by 2030
Visitor Expenditure	$327,000,000	$425,000,000 by 2030
Daytrip Expenditure	$150,000,000	$194,000,000 by 2030
Overnight Expenditure	$177,000,000	$231,000,000 by 2030
Daytrip Visitors	1,307,000	1,439,000 by 2019
Overnight Visitors	431,000	469,000 by 2019
Visitor Expenditure	$327,000,000	$358,000,000 by 2019

* See page 24 for details on growth rates.

In addition to the targets outlined above Western Australia's 2020 Tourism targets, adapted for the South West by ASW, are shown below along with medium (1.9%) and high (3.0%) growth targets for visitor expenditure in the Bunbury Wellington and Boyup Brook region (BW & BB).

ASW's & BW-BB's 2020 Targets - in working towards Tourism WA's 2020 Targets								
(UNIT: $ Million Visitor Expenditure)	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**
ASW	1,520	1,580	1,640	1,730	1,800	1,880	1,930	2,000
BW&BB 1.9% AAGR	302	328	336	343	348	353	358	363
BW& BB 3.0% AAGR	302	333	343	352	362	373	384	394
SOURCE: ASW AGM Presentation 2014 & EVOLVE Strategic Solutions								

The tourism strategy seeks to 'integrate' the region and improve the visitor experience through the following:

1. Heightened regional focus as a nature, adventure, culture and food-wine destination with themed self-drive routes and itineraries-packages.
2. Bunbury city as an accommodation, hospitality and shopping hub, from where visitors can overnight or day trip into the region via themed, self-drive routes.
3. Self-drive food-wine 'indulgence' trail from Harvey to Boyup Brook; a Bunbury-Collie scenic drive loop; a 'ring' route around the entire region and themed self drive routes (e.g. adventure, marine-aquatic, heritage and shopping-culture).
4. Strong events nurtured and grown; new events building on regional strengths such as boutique-size fee-paying food and cultural events at outdoor venues.
5. Increase in accommodation capacity including 24hr stopovers, campgrounds, nature-based parks, B&Bs, self-contained holiday units, serviced apartments and a resort.
6. Consolidated regional maps and holiday planner, a regional website, digital planning and way-finding (e.g. an App, Google Maps, Wi-Fi) and improved visitor servicing.
7. Increased tourism standards and professionalism, a consistently high 'quality' visitor experience, through training and accreditation.
8. LGAs collaborating on infrastructure and marketing material to develop the *region* as the destination; and tourism operators and stakeholders investing in cooperative marketing (regional-focus), standards and establishing a Sub Regional Tourism Organisation to help facilitate co-operative marketing and packages.

2.3 STRATEGIC AIMS

To integrate the region, increase visitation and tourism capacity and deliver a higher 'quality' visitor experience, the regional tourism strategy addresses seven key areas, which are outlined below:

1. Tourism Infrastructure
2. Marketing & Positioning
3. Product Development
4. Events
5. Digital
6. Standards
7. Governance

1. **Tourism Infrastructure**. In parallel with existing development programs[5] currently being planned by the seven LGAs, the *recommended* tourism development priorities have potential to significantly enhance the range and scope of visitor experiences on offer and increase visitation to the region. For example, inland diving at Lakes Kepwari and Stockton and Black Diamond Pool; formalising and developing Gnomesville as a tourist attraction and stopover; upgrades to Wellington National Park that enhance the adventure experiences on offer; the development of master-planned mountain bike trails in areas near Collie, Donnybrook, Balingup, Bunbury and Harvey; improved access

[5] The WA Government's Caravan & Camping Action Plan, Parks for People Program, and regional LGA tourism projects 2015-2020 (i.e. as outlined in the Shire's Community Strategic Plans & Corporate Business Plans).

and recreation amenities along the Blackwood River; directional signage along new *regional* self-drive routes; lighting of building exteriors within the centre of Bunbury; and the Boyup Brook Country Music and Arts Centre. The recommended priorities are detailed on page 14.

2. **Positioning.** The region is steeped in nature and adventure supplemented by food-wine, culture, heritage, event and shopping experiences. In comparison, Busselton aims to be the event capital, Margaret River aims to be the wine capital and Bridgetown-Manjimup-Pemberton aim to be the forest capital. The region's positioning needs to be unique, based on sustainable advantages which appeal to visitors. Collie and Wellington National Park and to a lesser extent Bunbury, Donnybrook and Balingup are poised to become dominant mountain biking destinations, attracting adventure seekers. Wellington and Ludlow Tuart Forest NP's along with the dams, river valleys, forest and beaches have distinct appeal to nature and adventure seekers. The region is well placed to be a leading adventure-nature getaway in the south west supported by boutique experiences in wine, food, culture, heritage and shopping. Positioning as an adventure-nature getaway enables the region to highlight many of its natural features whilst appealing to outdoor-adventure, nature-based visitors that can and will 'indulge' in the boutique services available across the region.

3. **Marketing**. The marketing plan addresses gaps and opportunities through advertising, promotion, partnerships and visitor servicing. Branding is an immediate, high priority and requires a facilitated process to develop a brand to use in regional advertising-promotion (e.g. TV, social media, website, maps, brochures). An advertising and promotion campaign in collaboration with ASW[6] is proposed targeting day visitors and domestic overnight visitors (e.g. using newspaper travel features, online, trade events, TV, lifestyle/travel magazines and social media). Consolidating visitor information into 'activity-experience based' maps is paramount in targeting day-trippers and overnight visitors and to grow visitation of specific visitor groups (e.g. adventure, wine-food, art-culture, nature, etc). Visitor servicing should be improved with a reduction in visitor centres, an increase in information nodes, an enhanced regional website, themed maps and a regional holiday planner that aids way-finding. If implemented gradually these changes have potential to reduce operating costs (e.g. fewer visitor centres, maps and brochures) to enable a reallocation of funds to *regional* tourism development.

4. **Product Development & Events**. There is scope to enhance the appeal of the region's tourism product and events. Examples include region-wide self-drive routes for wine, food-produce-hospitality, mountain biking and road cycling, and culture-heritage; the creation of brochures for trails and the development of trail links; the encouragement of boutique scale accommodation promoted via online booking sites and 'share' sites; the creation of suggested half and full day itineraries to accompany each themed map; new events such as bi-monthly music-cultural performances at selected sites, a food event focused on the Harvest Highway, an adventure event across multiple sites; a new

[6] The collaboration could take a variety of approaches. A suggested approach is the sub region establish an annual advertising-promotion budget and work closely with ASW to identify where, when and in what form the advertising-promotion program will occur. The underlying rationale is ASW has significant expertise in tourism advertising-promotion and this should be leveraged by the sub region. Further, the sub region's brand can and should appear in any initiatives coordinated via ASW as this will co-brand the sub region as a destination in Australia's South West, adding further impact to the general appeal and reach of the broader south west region.

country-lifestyle themed event incorporating music, camping, cars/utes/bikes and local food; stronger promotion of regional accommodation packages/itineraries linked to local events; agencies and NGO's partnering with the Roelands Community and WAITOC / TWA to develop aboriginal tourism experiences; aggregation of product / events into three distinct visitor seasons namely, Sept-Nov Spring Wildflowers and Events, Dec-Mar Summer water activities/swimming/fishing, Apr-Aug Autumn-Winter adventure & culture-hospitality activities and year-round promotion of indigenous, nature, hospitality and wine tours/activities/experiences; the creation of brochures and signage dedicated to white water rafting and/or canoe trails linked to canoe-in camp sites and the investigation of inland lake scuba diving at one or more sites.

5. **Digital.** Mobile and digital technology is becoming deeply entrenched in tourism (e.g. online bookings, reviews, travel apps, GPS trail-route guides, digital maps, MP3 interpretation, etc.). Rapid advances in technology continue to disrupt conventional approaches as more and more innovative technology is released. Visitors are increasingly able to access more and better information online than offline and rapid advances in mobile devices are further extending their application in tourism. As the adoption of digital technology increases in tourism the importance of having a digital strategy becomes paramount. The *region* needs a greater online presence initially through mass-market utilities (e.g. Google, Facebook, YouTube, TripAdvisor, Everytrail, etc) whilst building functionality online via a website, app, Wi-Fi hotspots etc that provides visitors with the digital tools that help plan, communicate, way-find and share their experiences.

6. **Standards**. Improved levels of tourism accreditation amongst the region's tourism operators will result in higher standards of service and professionalism across the region. In turn this will also help increase the region's capacity to offer a wider range of packaged tours and promote itineraries targeting international and interstate visitors. Workshops, networking events and facilitated programs will also improve quality standards through partnerships with the Chambers of Commerce, Business Enterprise / Incubator services, business support groups, TCWA and ATEC. Over the medium term, a larger collection of accredited operators will enhance the region's standard of professionalism and its capacity to offer a more compelling range of 'bookable' product to target cruise ship visitors, packaged tour groups and high yielding free independent travellers. Over the longer term, high quality standards could be the region's competitive advantage and point of difference.

7. **Governance**. Consultations identified support for a sub regional tourism organisation (SRTO). This will require participation and investment in the SRTO by tourism operators and LGAs revising current tourism budgets and approaches. The goal of regional tourism will be a regional approach to visitor servicing, regional maps, self-drive routes and events. A sub-regional tourism organisation should operate under a formal structure (e.g. incorporated association, limited company, joint venture or partnership) either newly created or already existing (i.e. modified to suit), or temporarily adopt an informal structure during its formative stages (e.g. alliance). The SRTO could coordinate itself via an online community using cloud-based enterprise software to link participants online collaboratively 24/7 to reduce the need to meet face-to-face. Preliminary indications

suggest LGAs require 12-18 months to begin the transition towards regional tourism leaving scope for tourism operators to form a group to work alongside the LGAs, formalising a structure, establish seed capital via investing 'upfront', securing members and readying to implement co-operative marketing initiatives within the action plan. A recommended approach is for the SRTO to initially focus on marketing (i.e. to develop packages and suggested itineraries that leverage new self drive routes, co-operative advertising and promotion of the region, partnerships with ASW) and gradually increase its funding and resource base.

2.4 TOURISM DEVELOPMENT PRIORITIES

STATE-SIGNIFICANT PRIORITIES

The region has five development priorities that have significant potential to stimulate growth in visitation *and* tourism enterprises, which would bring benefit to the region *and* the State. The five State-Significant priorities are listed below and should be pursued as the *highest* priority.

1. Develop the Collie Motorplex into Western Australia's premier motoring facility for regional WA.
2. Develop the Dolphin Discovery Centre into one of the state's premier dolphin experiences.
3. Support the development of iconic wine tourism experiences in the Ferguson Valley and prominent wine-growing areas across the region.
4. Develop a 5 star hotel in Bunbury.
5. Develop a new marina in Bunbury that includes facilities for cruise ship tenders, dive boats and dolphin cruises.

REGIONALLY-SIGNIFICANT PRIORITIES

A primary objective of the Regional Tourism Strategy was to identify tourism infrastructure and product opportunities to inform future development and investment. A list of potential tourism development opportunities was evaluated during regional workshops. Twelve regionally-significant development priorities were identified based on the following steps.

- Over 50 development options[7] were identified through desktop analysis and consultations covering tourism infrastructure, product development, events, trails and drive routes.
- 41 development options were presented to 30+ groups of workshop participants who each selected and ranked 6-8 *preferred* priorities (i.e. ranked on importance, achievability, benefit and appeal using a scale of 0-no rating to 3-high rating).
- The seven workshops identified twelve regionally-significant development priorities that have potential to bring about much needed improvement to the *region's* tourism appeal and capacity. The regionally-significant priorities are listed below in rank order (highest to lowest).

[7] Capital-intensive options were discarded, for example, high speed trains, Koombana Bay Marine Facilities, Bunbury ring road, etc.

1. Steadily upgrade tourism signage across the region, improving directional and interpretive signs (i.e. re-branding, improving standards & coverage).
2. Upgrade telecommunications infrastructure, eliminating 'black spots', ensuring reliable access to internet and mobile phone services across the region.
3. Install Wi-Fi hotspots within each town, enabling visitors to stay connected and to encourage town visits.
4. Link Bunbury, Ferguson Valley, Wellington NP and Collie as a scenic drive loop.
5. Identify potential campground sites on Shire-controlled land, develop low-impact sites and increase options for campers; ideally in proximity to day use areas.
6. Development of, or improvements to, trails for walking, mountain biking, canoeing & universal access; linking sites of interest to towns & day use sites.
7. Develop the Wilga Rail Trail between Donnybrook and Katanning; catering for mountain bikes, walking and horse riding.
8. Develop RV Friendly sites within close proximity to regional towns, create an RV trail (scenic route) between towns, linked to popular heritage, nature & recreation sites.
9. Develop a 'ring' road drive-route around the region taking visitors to popular sites, wineries-eateries, trails and forest-nature sites.
10. Install signage and maps linking Harvey, Ferguson Valley, Donnybrook, Balingup and Boyup Brook as a food, wine & produce drive trail with suggested itineraries and activities along the route.
11. Develop a nature-based adventure park with a zip-line, abseiling, toboggan run, canopy lookouts, tree climbs, etc,
12. Create a program of bi-monthly music or cultural events at boutique outdoor venues across the region, appealing to wine, food and cultural enthusiasts.

If the recommended priorities were developed over the medium term the region could expect an increase in daytrip and overnight visitors, tourism expenditure, and an enhanced regional profile as a prominent outdoor/adventure, events and self-drive destination.

Additional priorities were identified[8] late in the project that warrant further investigation by the LGAs and government (SWDC, RDA), which centre around the de-proclamation of Harvey and Wellington dams. Potential opportunities for development are outlined below.

- **Harvey Dam**: 12,707 hectare catchment area, approximately 64% is State Forest and Nature reserve; scope exists to increase recreation use, for example bushwalking, mountain bike riding (e.g. link Munda Biddi to Harvey), picnicking, formal and informal camping, fishing, swimming, scenic driving and canoeing. A master plan is required to guide future investment to support increased recreational use.
- **Wellington Dam**: 249,239 hectare catchment area, approximately 54% is national park and conservation estate and 43% freehold; the area currently supports high level recreational use, however scope exists to increase use for bushwalking, mountain bike riding, horse riding, picnicking, informal camping, scenic driving, fishing, canoeing and boating. Implement the master plan that already exists, with detailed design work to support increased recreational use.

[8] Source: *South West De-proclaimed Water Catchment Areas Recreation Assessment*. Prepared for the Water Catchment Interagency Collaborative Working Group May 2015 by The Department of Parks & Wildlife.

Potential development opportunities identified for ***private*** investment include:

- The development of a 4WD park[9] within the region, in close proximity to camping and/or accommodation facilities.
- Rural landowners establishing a nature-based park (campground) under the legislative framework, or establish facilities as an RV Friendly Destination, or 'walk-in / ride-in' accommodation for users of the Bibbulmun and Munda Biddi tracks.
- Develop a nature-based adventure park with a zip-line, abseiling, toboggan run, tree climbs, canopy lookouts, zorbing, bungee jumping, etc (e.g. www.ecoline.com.au).
- Five-star hotel-resort in Bunbury located in close proximity to the town centre and Koombana Bay foreshore, leveraging off the proposed (2014) marine facilities upgrade in Koombana Bay.

A selection of supplementary development options are presented in the appendix for comparative purposes.

[9] Typically includes 4WD tracks of varying difficulty incorporating sand, rocks, mud and water; also used for training, recreation, events and vehicle testing; can include areas for viewing, picnic/hospitality, amphitheatre/events, camping & storage.

2.5 REGIONAL ACTION PLAN

The action plan for the region focuses on seven key areas: 1. Marketing Material. 2. Events. 3. Packaging. 4. Infrastructure. 5. Governance, 6. Standards and 7. Partnerships. A memorandum of understanding (MOU) between the LGAs will provide an overarching framework to help 'regionalise' tourism.

ACTION AREA	AIM: To consolidate the seven Shire's tourism information into a coordinated regional marketing approach.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 1	**MARKETING MATERIAL**			
1.1 Website	Develop a regional tourism website with digital maps, holiday planner, suggested itineraries, gallery (video & images), bookings & ticketing (events); Linked to social media & travel sites.	High	2015/16	LGAs
1.2 Themed Regional Maps	Develop themed regional maps listing ALL[10] the region's food, wine, adventure & nature, art, culture, shopping & heritage sites; with a way-finding focus; phase out shire-based maps	High	2015/16	LGAs
1.3 Regional Holiday Planner	Enhance Bunbury's Regional Planner with themed routes, themed itineraries, suggested packages (accom., tour, food), event & accommodation options & ALL regional events.	High	2015/16	LGAs
1.4 App	Develop an offline[11] App, driven by GPS not phone networks, to guide visitors on self drive routes and to sites, places & operators across the region. Refer to the appendix.	High	2015/16	LGAs
1.5 Drive Route Signage	Install directional signs and markers along the three main self-drive routes to complement the maps and App; Indulgence Trail, Bunbury-Collie Drive Loop and Regional 'Ring' Road.	Med	2016/17	LGAs
1.6 Entry Statements	Install entry statements at northern, eastern & southern points of entry, at places of interest (e.g. Yarloop Workshops, Golden Valley Tree Park, Collie Tourism Precinct, Boyup Brook).	Med	2016/17	LGAs
1.6 Roadside Billboards	Install roadside billboards on reserves/freehold along main access roads; depicting enviable images of people at scenic places, with the region's slogan & a call to action.	Med	2017/18	LGAs
1.7 Social Media	Create a *regional* presence on Facebook, Twitter and Instagram; LGAs and stakeholders post text, movies and images about events, celebrities, happenings, specials, sightings, etc....	Med	2017/18	LGAs, SWDC, Operators, Residents
1.8 Digital	Create and maintain a *regional* presence on Google maps, Trip Advisor, You Tube and other channels as they emerge; highlight the brand name, priority themes & images; weblinks to operators; visitor experiences; popular sites and scenery; etc.	Med	2017/18	LGAs, SWDC, Operators, Residents

[10] Operators willing to pay for a listing get a colour photo and/or additional information displayed. Operators NOT WILLING to pay for a listing only get a phone number and address displayed.

[11] An offline app works in 'blackspot' areas with no mobile phone coverage. In future, when full mobile coverage exists across the region the App can be re-engineered or abandoned. The website can be 'mobile responsive' and can help visitors but it *cannot* provide the features-functionality of an offline mapping App.

The event strategy is:

1. Maximise the value of existing *major* events and introduce approaches that grow event visitation, increase value and extend stay in the region.
2. Introduce new events that build on strong themes and regional venues/participation and muster support that enables them to succeed and prosper.
3. Increase the *region's* profile as an event destination, leveraging the promotion of major and unique events that help extend the visitor season.
4. Establish an event framework to prioritise, resource and coordinate events regionally, aided by a regional event alliance.

ACTION AREA	AIM: To improve the Region's event standards, appeal & sustainability.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 2	**EVENTS**			
2.1 New Food-Wine Event	Investigate a regional food & wine event along the Indulgence Trail/Harvest Highway including hospitality, wineries & food-produce suppliers; packaged with accommodation.	High	2015-2016	LGAs & Event Groups
2.2 New cultural - food event	Investigate a bi-monthly outdoor music/performance event, 5-6 events per year, different venues across the region, supplemented with local food & wines; packaged accommodation.	High	2015-2016	LGAs & Event Groups
2.3 Sport Events	Build relationships with sporting associations & DSR to increase the range and number of sporting events in the region; including masters, nationals and mass participation events.	High	2015-17	LGAs & Event Groups
2.4 Event Alliance	Investigate a regional event alliance of Bunbury's Event Coordination Group, LGAs & regional event groups to improve the focus, value & sustainability of the regional event program.	Medium	2016/17	LGAs & Event Groups
2.5 Event Framework	Introduce an event framework that fosters consistency in a regional event program, standardising resourcing, promotion, risk management, evaluation, tiered prioritising, etc	Medium	2016/17	LGAs & Event Groups
2.6 Funding	Investigate 'regional' approaches to funding and resourcing new events of regional significance; e.g. regional grant applications, LGA event pool (funds), event levy, etc.	Medium	2016-2018	LGAs & Event Groups
2.7 Enduring Events	Identify the region's premiere events to be retained and work collaboratively to improve and build the selected events.	Medium	2016-2019	LGAs & Event Groups
2.8 Event Profile	Adopt a collaborative approach to promoting the region as an event destination using common channels (e.g. social media, websites, event directories/lists & publicity)	Medium	2016-2019	LGAs & Event Groups
2.9 Business Events	Develop relationships with Event Coordinators, Industry Bodies & large Corporates; establish promotional package of venues, accommodation, pre & post activities, transport options, etc	Medium	2106-2019	LGAs & Event Groups

ACTION AREA	AIM: To enhance the region's appeal through the distribution of 'packaged' product.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 3	**PACKAGING**			
3.1 Business Facilitation	Chambers of Commerce, Business Incubators & Small Business Advisers encouraged to promote co-operative marketing to tourism operators & assist in facilitating packages.	High	2016-2018	CCI, etc
3.2 Tourism Groups	Visitor Centres & Tourism (Progress) Association's encouraged to run a series of networking events to facilitate collaboration among tourism operators (e.g. Sundowners, Guest Speakers)	High	2016-2018	LGAs
3.3 Capacity Building	ASW be supported by LGAs to roll out its 'Capacity Building' program to established tourism operators & support the Asia Tourism Development Centre concept in building capacity.	High	2016-2019	ASW
3.4 Suggested Itineraries	Include themed itineraries & suggested programs in the revamped holiday planner, website & themed maps, helping prompt visitors to experience a 'package' of sites & operators.	High	2016-	LGAs
3.5 Packaging Preparedness	Encourage operators to participate in Tourism Council WA's tourism accreditation, export-readiness programs and industry marketing forums to increase momentum towards packages	High	2016-2017	LGAs, ASW, SWDC, TCWA
3.6 Package Themes	Visitor Centres & Tourism (Progress) Association's encouraged to promote priority themes for packages such as food and wine, shopping, arts, adventure-nature & events.	Med	2016-2019	VIC's & Associations
3.7 ITOs & Wholesalers	Encourage 'proactive' operators seeking to develop packages to align & open dialogue with Perth-based ITOs and Tour Wholesalers to identify product that is in high demand.	Med	2016-2019	ASW, VIC's, LGAs, SWDC
3.8 Engaging Operators	Through social media, e-newsletters, Shire websites & community notices encourage tourism operators to join networking events & forums/groups to collaborate in developing packages.	Med	2016-2019	LGAs, VIC's, SWDC, CCI,
3.9 Operator Alliance	Form an alliance of operators to meet & discuss the development & promotion of packages, & compile an inventory of package-able product for distribution to Tour Wholesalers .	Med	2016-2019	ASW, VIC's
3.10 Event Packages	Form a sub-committee to investigate / coordinate event packages; for example, Leschenault Lady steam train run on local tracks, linking towns, wineries, hospitality, arts, heritage, etc..	Med	2016-2019	LGAs

ACTION AREA	AIM: To invest in experiences that differentiate the Region from competitors & increase visitation.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 4	**INFRASTRUCTURE**			
4.1 Council of LGAs	Using the existing Council of LGAs review the recommended priorities for rerating and/or endorsement and where appropriate prepare business cases & funding applications.	High	2016-2017	LGAs
4.2 Priority Projects	Review the endorsed infrastructure priorities and their respective planning & land use implications, in preparation for economic and social benefit analysis.	High	2016-2017	LGAs
4.3 Investment Attraction	Prepare business cases and funding applications for the preferred investment priorities.	High	2016-2017	LGAs. CoB, SWDC, TWA
4.5 Five Star Accommodation	Compile an investor memorandum for a 5 star hotel resort located within the City of Bunbury and distribute widely through financial, investment and banking communities.	Med	2016-2019	SWDC, CoB, RDA, TWA
4.6 Camping Accommodation	LGAs to communicate with landowners and rate payers to raise awareness of and support for nature based parks and RV Friendly Destinations being established on private land.	Med	2016-2019	LGAs
4.7 Self Drive Routes	Investigate a regional-based grant application to fund signage along the proposed self-drive routes (e.g. directional signs, route markers & approach signs for points of interest).	High	2016-2017	LGAs
4.8 Dams	Investigate participation in the Interagency Working Group and Master Plans for (proposed additional) recreational activity in de-proclaimed areas of Harvey Dam and Wellington Dam.	High	2016-2017	LGAs
4.9 Mobile Communications	Continue to lobby mobile phone network operators to address blackspots and assist in establishing Wi-Fi in regional towns or at selected hotspots (e.g. Wellington NP)	Med	2016-2017	LGAs.

ACTION AREA	AIM: To develop regional approaches for organising and developing tourism.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 5	**GOVERNANCE**			
5.1 MOU	LGAs to identify 'common ground' as the basis for a Memorandum of Understanding; principal aim is 'regionalising' marketing material, self-drive routes & tourism development.	High	2015-2016	LGAs
5.2 SRTO	Potential SRTO stakeholders form an alliance as a first step in establishing an operator-driven & regionally-focused SRTO to grow tourism.	High	2015-2016	Stakeholders
5.3 SRTO	Upon forming an alliance, establish a constitution, a legal entity, funding and resources and a program of networking events and operator forums to build collaboration among operators.	High	2016-2017	Stakeholders
5.4 Planning	LGAs to ensure town planning controls & guidelines encourage tourism investment; planning departments practice the intent to facilitate the strategic development of tourism.	High	2015-2019	LGAs
5.5. Short Stay Accommodation	LGAs establish a common policy on standards governing private residences marketed online, operating short-stay accommodation on a semi-commercial / semi-permanent basis.	Med	2016-17	LGAs
5.6 Regional Tourism	LGAs and SRTO to explore avenues to collaborate implementing the regional tourism strategy and especially branding, packaging, drive routes and destination marketing.	Med	2016-17	LGAs, Stakeholders
5.7 Chambers of Commerce	Local Chambers of Commerce to organise networking events, collaboration among operators, promoting accreditation & QA & business improvement, co-operative campaigns, etc	Med	2016-17	CCI's
5.8 Tourism Associations	Existing tourism associations be encouraged to meet regularly to explore projects they can collaborate on and how they can help upgrade/improve regional marketing materials.	Med	2016-17	LGAs Vic's
5.9 Visitor Research	Commence a visitor research program gathering & analysing data from visitor centres, accommodation outlets, popular sites, wineries, etc and analyse/report findings twice yearly.	Med	2016-2019	LGAs. VICs.

ACTION AREA	AIM: Raise awareness of resources available for operators/VIC's to improve standards.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 6	**STANDARDS**			
6.1 Tourism Accreditation	Tourism Operators be encouraged to familiarise with Tourism Council WA training and development programs, especially pathways to becoming tourism accredited.	High	2016-2019	VIC's, Tourism Associations
6.2 Business Standards	Tourism Operators be encouraged to support (collectively fund) TCWA facilitating a series of workshops on accreditation, packages, quality assurance, co-operative marketing, etc.	High	2016-2019	VIC's, Tourism Associations
6.3 Business Standards	Visitor Centres (LGAs) be encouraged to keep members and operators informed of tools & resources available to improve standards[12], participate in packages, align with ITO's, etc.	High	2016-2019	VIC's, Tourism Associations
6.4 Export Ready	Tourism Operators be encouraged to familiarise with Australian Tourism Export Council by participating in industry forums, training workshops & trade shows to become 'export ready'.	Med	2016-2019	VIC's, Tourism Associations
6.5 Business Support	Visitor Centres be encouraged to keep members and operators informed of government programs aimed at planning, training, staff development, etc.	Med	2016-2019	VIC's, Tourism Associations
6.6 Skills Development	TAFE / Vocational education institutions be encouraged to collaborate with VIC members & tourism operators to facilitate trial placements / volunteer work experience for students.	Med	2016-2019	SWDC, ASW, LGAs
6.7 Familiarisations	Commence a program of Visitor Centre staff visiting intra-regional visitor centre's to familiarise with tourism products/services across the region, during the low periods.	Med	2016-2019	VIC's, LGAs
6.8 Collaboration	Local CCIs to facilitate forums / networking opportunities for tourism operators to promote resources & approaches that improve standards, professionalism & sustainability.	Med	2016-2019	CCI's
6.9 Promotion	Once a regional brand is developed encourage operators to use the regional brand, logo & approved images consistently across all their promotions to deliver coordinated branding.	Med	2016-2019	

[12] Tools and resources available online via Tourism Australia, Tourism WA, Small Business Development Corporation, Federal Department of Industry, Business Enterprise Centres, Small Business Centres, etc

ACTION AREA	AIM: To build relationships that help foster a regional approach to tourism development	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 7	**PARTNERSHIPS**			
7.1 WAITOC	SWDC and LGAs open dialogue with WAITOC to investigate approaches to develop tourism at Roelands, help establish mentoring for Aboriginal tourism entrepreneurs & start-ups.	High	2016-2019	SWDC, LGAs
7.2 DPaW	Open dialogue with DPaW's regional managers to investigate product development opportunities at Ludlow Tuart Forest & Wellington NP's, Wellington Dam and Harvey Dam.	High	2016-2019	SWDC, LGAs
7.3 CCIs	LGAs open dialogue with local CCI's to help facilitate networking events, business (operator) forums and assistance in the development of collaboration between operators.	High	2016-2019	LGAs
7.4 Interagency Working Group	LGAs open dialogue with the Water Catchment Interagency Working Group to participate in master planning for recreation use in Wellington & Harvey dams.	Med	2016-2019	LGAs
7.5 TWA	LGAs open dialogue with Tourism WA in respect to famils, regional promotion campaigns, event programs and infrastructure development programs.	Med	2016-2019	LGAs
7.6 ASW	Subject to funding – LGAs and the SRTO investigate options to advertise or promote the region through ASW's existing campaigns, with an emphasis on establishing a regional brand.	Med	2016-2019	LGAs, SRTO
7.7 ASW	LGAs and the visitor centres open dialogue with ASW to encourage tourism operators to participate in the 'capacity building' program & proposed Asia Tourism Development Centre.	Med	2016-2019	LGAs, Visitor Centres
7.8 Transwa	LGAs open dialogue with Transwa to explore rail / coach package options with local operators and advertising campaigns on trains (e.g. posters, billboards, etc).	Med	2016-2019	LGAs
7.9 SRTO & Operators	Open dialogue with TWA to identify interested ITO's and Tour Wholesalers to commence assessment of priority packages that could be established & marketed to niche segments.	Med	2016-2019	SRTO & Operators
7.10 Local Tourism Associations	Local tourism associations to establish a regular forum to convene and investigate regional approaches including famils, staff training, accreditation / standards and websites.	Med	2016-2019	Visitor Centres

2.6 REGIONAL MARKETING PLAN

During 2010-2013, the region's visitor market averaged: 1,307,000 day trip visitors, 403,000 overnight domestic visitors and 27,000 international visitors. Total visitors: 1,738,000. Visitor expenditure 2010-2013 averaged an estimated $328,000,000p.a. The region's market share of all WA visitors was steady at 8%.

The region's products (i.e. include attractions and activities), which influence visitors motivation to visit the region, includes 141 recreation-adventure options, 103 heritage options, 90 shopping-art-culture options, 90 nature-aquatic-marine options, 82 wine-hospitality options and 49 events. The region offers a predominance of recreation-adventure and nature-aquatic-marine options (233) closely followed by culture-shopping-wine-food options (172). The region's 'stock' of attractions and activities underwrites its positioning as an adventure-nature getaway bolstered by boutique wine, food, culture and shopping experiences. This positioning puts the region in direct competition with Peel, Augusta-Margaret River-Busselton and Southern Forests albeit differentiated by Bunbury City, rivers and valleys (scenery, topography) and 12 rural townships in proximity to tourism attraction/activity nodes. These differences are to be leveraged through drive routes, themed maps, itineraries, website, events and infrastructure, which supports access to these differentiating features.

The main visitor markets and respective growth targets for the region during 2015-2019 are shown below:

VISITOR SEGMENT	TARGET VISITATION 2015-2019	GROWTH TARGET[13]	SOURCE / ORIGIN OF VISITORS
Day trip visitors	1.42M - 1.44Mp.a.	1.2% - 1.8% p.a.	80% from across the greater south west region 20% from Perth & surrounds
Overnight domestic visitors	410,000 - 437,000p.a.	1.4% - 2.0% p.a.	90% from Intrastate (WA) and 10% from Interstate
International visitors	27,000 - 33,000p.a.	3.8% - 5.0% p.a.	25% UK, 10% NZ, 10% Asia & China, 5% Germany & Europe

The marketing plan aims to increase day trip visitors, domestic overnight visitors and international visitors by establishing a regional brand, promoting regional attractions/activities, events and operators, communicated by print, face-to-face and digital mediums and emphasising four main categories of interest to holiday-leisure visitors (e.g. via images, text and video), which are:

1. **Adventure-Nature**: mountain biking, canoeing, camping, fishing, diving, cycling, swimming and rivers, forest, beaches, flora/fauna, hiking & trails.
2. **Food , Wine, Hospitality & Events**: cafes, restaurants, wine, produce and events.
3. **Shopping, Services & Culture**: shopping, services (medical, commercial, general), heritage, art-craft, performances and entertainment.
4. **Sport and Recreation**: competitive and team sports, recreational events/activities, trails, and active outdoor/indoor pursuits.

Business visitors are essentially day trip or overnight visitors and will be targeted through the initiatives within the respective areas of the plan. Action plans for day trip, overnight domestic and international visitors are set out below.

[13] Growth Rates are based on TRA's *Tourism Forecast Tables Autumn 2014* for the period 2015-2019 with TRA's LOW growth targets adopted and then adjusted to reflect local and regional south west influences. LOW growth rates used to calculate future visitation & nights stayed were as follows: Overnight visitors 1.6%p.a.; Visitor nights 1.7%p.a.; Daytrip visits 1.45%p.a.

ACTION AREA	AIM: To increase communication to families, friends & communities close to the region.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 1	**Regional Marketing Plan – DAY TRIP VISITORS**			
1.1 Branding	Appoint a specialist to facilitate focus groups to develop a brand, tag line & logo; register the name, brand & logo with 'IP Australia' and register a branded URL.	High	Immediate	LGAs
1.2 Events	Establish a standard approach to event promotion targeting residents of greater South West & Perth via social media, event directories, lifestyle websites, regional newspapers & publicity.	High	2016-2019	LGAs, Event Alliance
1.3 Sports Events	Establish a calendar of regional sports events promoted on a regional website; upcoming events posted on social media; video footage uploaded to a You Tube Channel;	High	2016-2019	LGAs, Event Alliance
1.4 Residents as Ambassadors	Residents & the community to encourage family and friends to visit by showcasing the region's appeal via social media and word of mouth; aided by a website & marketing material	High	2016-2019	LGAs, SRTO
1.5 Residents	LGAs encourage households to host visits by friends & family by promoting monthly 'top 10' things to do in the region including events, scenery, self-drive routes & suggested itineraries.	Med	2016-2019	LGAs
1.6 Social Media	Establish a 'regional' presence on popular social media sites, e.g. Facebook, Instagram, Twitter, You Tube, Pinterest, Google +, Tumblr, Flickr, etc. Promote reasons to visit.	Med	2016-2019	LGAs
1.7 Social Media	Appoint a team to post regular updates, images, videos, event notices, sporting highlights, happenings, etcetera on social media, You Tube & online forums. Promote reasons to visit.	Med	2016-2019	LGAs
1.8 Publicity	Appoint a team to distribute event and holiday information to print & online magazines, newspapers & directories; promoting activities-experiences & itineraries / packages on offer.	Med	2016-2019	LGAs
1.9 Marketing Material	Refer to the 'Marketing Material' action plan. Promote these on social media & website.	Med	2016-2019	LGAs
1.10 TV Advertisements	Investigate advertisements on regional TV channels promoting major events & seasonal highlights (i.e. what's on in the region); promote website, App, self-drive routes, maps, etc.	Med	2016-2019	LGAs
1.11 Digital (Online)	Promote the App[14] and regional tourism website on social media, online forums & in printed maps and regional holiday planner.	Med	2016-2019	LGAs
1.12 Information Nodes	Gradually establish a series of tourism information outlets (nodes) in each town to replace smaller visitor centres & further increase distribution of information to day trip visitors.	Med	2016-2019	LGAs

[14] Refer to the appendix for an overview of the proposed App.

ACTION AREA	AIM: Raise awareness of the region & the experiences on offer & grow/extend visitation.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 2	**Regional Marketing Plan – DOMESTIC OVERNIGHT VISITORS**			
2.1 Branding	Appoint a specialist to facilitate focus groups to develop a brand, tag line & logo; register the IP with 'IP Australia' (i.e. name, logo, slogan); establish a library of 'approved' images.	High	Immediate	LGAs
2.2 Printed Materials	Compile self-drive route & themed experience maps & a regional holiday planner for distribution from visitor centres, information nodes, Shire offices, popular sites & events.	High	2016-2019	LGAs
2.3 Website & App	Establish a regional tourism website with a high degree of functionality[15]; establish an offline App offering maps & audio-guide for self-drive routes showcasing ALL sites-experiences.	High	2016-2019	LGAs. CoB
2.4 Digital Maps & Planner	Distribute digital (PDF) versions of the self-drive route & themed experience maps via regional tourism & shire websites, visitor centre websites & promoted via social media.	Medium	2016-2019	LGAs
2.5 Travel & Tourism Websites	Develop a regional profile on popular tourism & travel websites[16] by establishing a presence on lists & directories; monitor postings, reviews & listings; expand the profile where possible.	Medium		LGAs. SRTO. VICs.
2.6 ASW	Subject to funding for regional promotion – assign ASW to promote the region via selected newspaper features, Winter Escapes, consumer shows, trade promotions & famils.	Medium	2016-2019	LGAs, SRTO
2.7 Social Media	Maintain a profile on social media e.g. Facebook, Instagram, Twitter, You Tube, Pinterest, Google +, etc. Promote events, sport, happenings, tourism websites, App, maps, etc	Medium	2016-2019	LGAs, SRTO
2.8 Marketing Material	Use social media to promote the maps & planner & their availability. Distribute digital (PDF) versions via websites & distribute print versions via visitor centres, info nodes & popular sites.	Medium	2016-2019	LGAs, SRTO
2.9 Online	Subject to funding for regional promotion - establish a Google Adwords campaign targeting Gen X & Y and Baby Boomers seeking adventure getaways, food-wine & event experiences.	Medium	2017-2019	LGAs, SRTO
2.10 Famils	Through ASW and/or TWA aim to host media, travel & transport famils at selected high profile sites across the region and supply information kits to each participant.	Medium	2017-2019	LGAs, SRTO
2.11 Publicity	Develop an information e-kit and supply to popular travel & tourism publications such as RAC, Scoop, Wanderer, Australian Traveller, Get Up & Go, Gourmet Traveller, etc	Medium	2017-2019	LGAs, SRTO
2.12 Billboards	Investigate installing large roadside billboards on private land along major routes into the region showing people enjoying adventure-nature-hospitality experiences.	Medium	2017-2019	LGAs. SRTO

[15] High functionality includes language translator, bookings facilitated by a global booking site, event ticketing, forum & reviews, itinerary & package options, map & planner downloads, operator advertisements, link to App store, event calendar, trip planning tools & suggestions, conference-seminar options, fly-drive options, live web cams, video & image library, seasonal trip planner, camping-adventure guide, shopping & gourmet guide, family & kids planner, mobile responsive, etc......

[16] Websites such as Trip Advisor, Gogobot, Virtual Tourist, Scoop Traveller, Fodor's, DriveWA, VisitWA, RAC, etc..

ACTION AREA	AIM: Raise awareness of the region & the experiences on offer & grow visitation.	PRIORITY	TIMEFRAME	LEAD AGENCY
Priority Focus # 3	**Regional Marketing Plan – INTERNATIONAL VISITORS**			
3.1 Branding	Appoint a specialist to facilitate focus groups to develop a brand, tag line & logo, register the IP with 'IP Australia' (i.e. name, logo, slogan) and register-secure a branded URL.	High	2015-2016	LGAs
3.2 Website	Regional tourism website – with language translator, links to popular travel-tourism websites, linked to a global booking system and linked to the region's social media pages.	High	2015-2016	LGAs. CoB.
3.3 App	Develop an offline App offering maps & audio-guide for self-drive routes showcasing ALL sites-experiences; ideally supplementing the maps & planner to way-find sites of interest.	High	2015-2016	LGAs. CoB.
3.4 Online Video	Develop a collection of video's taken at popular sites showing visitors engaging in adventure, nature, food-wine and shopping experiences and post to You Tube, Facebook, Pinterest, etc	Medium	2016-2018	LGAs. CoB.
3.5 Online Advertising	Subject to funding for regional promotion - establish a Google Adwords campaign targeting Gen X & Y (i.e. 20-50y.o.) seeking adventure, nature, food-wine & shopping experiences.	Medium	2017-2019	LGAs, SRTO
3.6 Travel & Tourism Websites	Develop a regional profile on popular tourism & travel websites[17] by establishing a presence on lists & directories; monitor postings, reviews & listings; expand the profile where possible.	Medium	2016-2018	LGAs. SRTO. VICs.
3.7 Marketing Material	Use social media to promote the maps & planner & their availability. Distribute digital (PDF) versions via websites & distribute print versions via visitor centres, info nodes & popular sites.	Medium	2016-2019	LGAs, SRTO
3.8 Collaborative Marketing	Subject to funding for regional promotion - Partner with ASW and participate in selected famils, overseas trade & consumer shows, and online promotional campaigns.	Medium	2017-2019	LGAs, SRTO
3.9 Packages	Attend industry networking forums / trade shows hosting inbound tour operators, tour wholesalers and online travel agents to promote locally packaged product.	Medium	2017-2019	SRTO. CoB
3.10 Publicity	Develop an information e-kit (on a USB) and supply to global travel & tourism publications such as Lonely Planet, Fodors, Virtual Tourist, Rough Guides, World Travel Guide, etc	Medium	2017-2019	LGAs, SRTO

[17] Websites such as Trip Advisor, Gogobot, Virtual Tourist, Scoop Traveller, Fodor's, DriveWA, VisitWA, RAC, etc.

SECTION 3 - GOVERNANCE

3.1 MANAGEMENT OF TOURISM

Historically the management of tourism in the sub-region has involved Shires, tourism associations, tourism operators and government agencies (e.g. Parks & Wildlife, Main Roads, Transport, Tourism WA, Water Corp., etc) – with no centralisation or coordination. Promotion of the region's towns and local destinations has been facilitated by Shires investing in visitor servicing, marketing and tourism infrastructure guided by Community Strategic Plans and Corporate Business Plans. Local tourism and Progress Associations have helped operate visitor centres, develop maps and brochures, organise local events and coordinate promotional campaigns, supported by LGA funding and resources. Tourism operators have provided the 'capacity' to host and service visitors, have helped build awareness of the region in promoting their businesses and have supported tourism associations and visitor centres via membership fees and supporting bookings. Government agencies have facilitated public tourism infrastructure, planning and research and the governance of legislative frameworks to facilitate tourism. These multiple stakeholders have operated under different frames of reference measured against different objectives and targets. There is support for changing the way tourism is managed across the sub-region, however, it appears there is no universally acceptable approach that can immediately drive growth in regional tourism in the short-medium term. An incremental approach is recommended where steps are taken that gradually help establish a Sub Regional Tourism Organisation that provides a centralised and coordinated approach to regional tourism initiatives.

Changes in priorities, roles, contributions and organisation is required, however barriers currently exist that hinder the immediate transition to a sub-regional tourism approach including:

- resource-constrained tourism operators with limited ability to invest in regionalising tourism and limited interest in championing change in the region's tourism.
- local tourism associations, built on volunteers and 'shoestring' budgets, seem naturally opposed to change that impacts upon local communities; and
- the comparatively rigid planning, budgeting and staffing regimes of the LGAs along with the significant differences in resourcing for tourism among the seven LGAs.

An ideal solution is to form a sub regional tourism organisation based on regional representation and purpose and resourced through operators and commercial means, however, this appears unlikely at this point in time. The breadth of *potential* roles that could be assigned to a sub regional tourism organisation provide an indication of the amount of change that could be embarked upon in moving towards regional tourism governance. The *potential* roles of a SRTO are outlined below and while most of the roles are offered by a range of existing entities the challenge is agreeing upon which roles to 'regionalise' in establishing a governance approach that best suits the region's stakeholders and tourism:

- ❖ Advocacy – represent & present the region
- ❖ Planning – develop & renew regional tourism
- ❖ Marketing – communication & promotion
- ❖ Training - Quality Assurance & Accreditation
- ❖ Events – develop & run events
- ❖ Product Development – guide & facilitate
- ❖ Visitor Services – information & operations
- ❖ Partnerships & Alliances

Current and potential providers of sub-regional tourism services are outlined below:

ROLE	CURRENT PROVIDER(S)	FUTURE PROVIDER(S)
Advocacy – represent & present the region	SWDC, ASW, LGAs, Tourism Associations, Operators	SRTO, Tourism Associations
Planning – develop & renew regional tourism	SWDC, RDA, LGAs	LGAs, SRTO, Tourism Associations
Marketing – communication & promotion	LGAs, Tourism Associations, ASW	ASW, SRTO, Tourism Associations
Training - Quality Assurance & Accreditation	TCWA	TCWA
Events – develop & run event calendar	LGAs, TWA	LGAs, SRTO, Event Alliance
Product Development – guide & facilitate	LGAs, SWDC, RDA	LGAs, SWDC, RDA, SRTO
Visitor Services – information & operations	LGAs, Tourism Associations	LGAs, Tourism Associations
Partnerships & Alliances	TWA, SWDC, ASW, LGAs	SRTO, ASW, TWA
Research – visitors & markets	TRA, TWA	TRA, TWA, SRTO

Alternative approaches to organising and managing tourism 'regionally' are outlined below:

1. **LGA Alliance:** The seven LGAs collaborate in establishing a regional approach to tourism development. A memorandum of understanding is established between the LGAs specifying the contribution and role of each respective LGA including funding and resourcing (e.g. in-kind, staff, % of tourism promotion budget). Priority initiatives are agreed such as regional branding, marketing materials and destination promotion. Responsibilities are assigned among the respective LGAs to implement the initiatives. If required, a working group of respective LGA staff is established to communicate and coordinate regional initiatives. The City of Bunbury could potentially take a leading role in facilitating a regional approach provided all the Shires 'opted in' with support. Respective Shire staff (e.g. working group) could work together on projects that matched their Shire's capability and capacity. Reporting and performance monitoring would be centrally coordinated, possibly on a rotational basis (e.g. City of Bunbury for 2yrs, Dardanup for 2yrs, etc).

2. **Tourism Alliance:** A formal group is established comprising 10-12 representatives from government agencies (e.g. SWDC, DPaW, TWA), local government, non-government organisations (e.g. CCI, ASW, BWEA), local tourism associations, tourism industry representatives (i.e. operators) and regional stakeholders (e.g. industry, community, volunteers, etc). The Alliance would have a terms of reference, a charter, a chair person, executive officer support (via one or more LGAs) and capacity to appoint 'community champions' willing to chair sub-committees to help drive specific projects. LGA staff, local tourism association members / committees and Tourism Alliance members would be assigned specific tasks to implement and report on. The Alliance would focus on implementing the regional tourism development strategy, monitoring the marketing program and facilitating the progress of infrastructure investment and providing updates to the tourism strategy as required.

3. **Regional Tourism Coordinator.** A full or part time position is created, jointly funded by the LGAs (e.g. via secondment, in-kind, pro-rata funding, volunteer contribution), and dedicated to implementing initiatives in the regional tourism strategy, working closely with the seven LGAs and five local tourism groups. The Coordinator helps facilitate 'collaborative' initiatives such as a destination website, themed self-drive maps, itineraries and packages, advertising-promotion (via ASW), improved visitor servicing, drive route signage and new events. The position could be established as a 2-year trial in anticipation of an alternative approach thereafter. The primary purpose of the Regional Tourism Coordinator is to provide *immediate* capacity and accountability to facilitate initiatives that regionalise tourism and achieve the aims of the tourism strategy.

4. **Existing Tourism-based Incorporated Association** An existing tourism entity[18] be transformed into a 'renewed' entity to organise and drive regional tourism. This would require approval by members of the relevant association to change the objects / purpose to suit the proposed SRTO and make appropriate changes to the constitution. Support from regional stakeholders would also be required before taking this approach. Upon formation, the renewed entity would begin a membership drive and secure recurrent funding from sponsorships, donations, commercial opportunities, LGAs and members to fund its activities. Its principal purpose would be to foster a sustainable tourism industry across the sub-region, taking guidance from this tourism strategy during its formative years.

5. **A new entity** Similar to (4) above except a new entity is established, for example, an incorporated association, a limited liability company, or an incorporated joint venture with members-participants including LGAs, operators, local tourism associations and interest groups (e.g. CCI, BWEA, etc). The new entity begins a membership drive, seeks recurrent pro-rata funding from the 7 LGAs, seek sponsorships and donations, commercial opportunities, etc to fund its operating activities. Its principal purpose would be to foster growth in tourism across the sub region.

6. **Unincorporated joint venture** is established between the existing associations (i.e. an agreement sets out the role and contributions of each existing association – but no new entity is required). The joint venture establishes a Board of Management who in turn appoints subcommittees to manage individual tourism projects. The joint venture would aim to secure executive officer support via regional stakeholders (e.g. Government, LGAs, CCI's, CRC's, etc). Funding via LGAs, grants, membership, merchandise, bookings etc could be channelled to the existing associations and then apportioned to the JV's trust account to fund tourism projects. The unincorporated JV extends the role of existing tourism associations into becoming key players organising and driving tourism regionally – in collaboration with like-minded entities.

A recommended approach to the management of regional tourism follows.

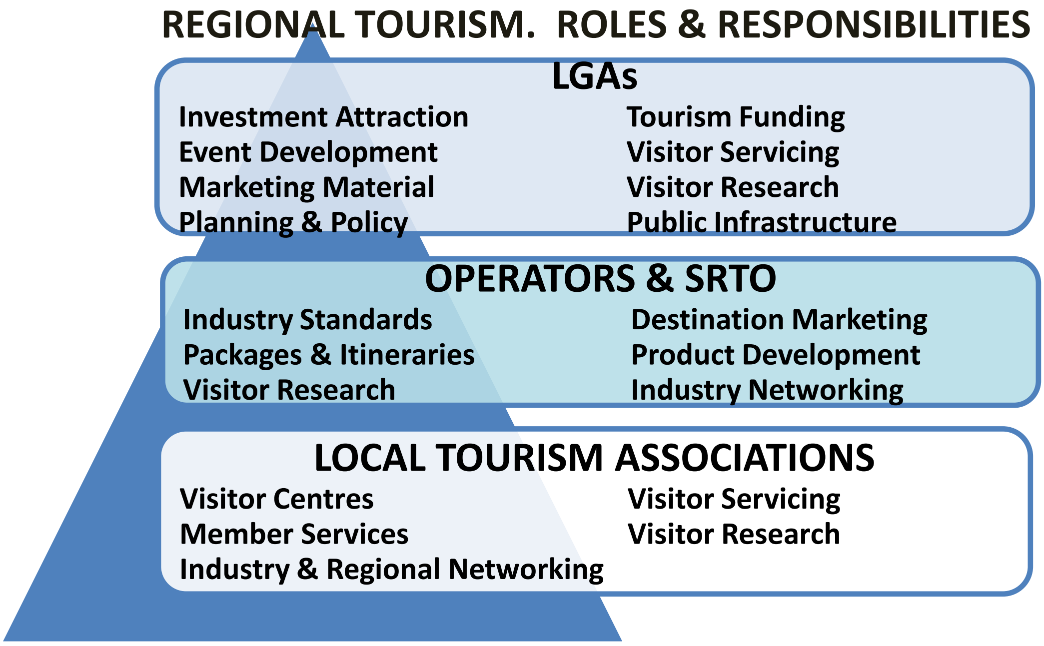
[18] Existing tourism entities include Collie River Valley Marketing Inc, Ferguson Valley Marketing & Promotion Inc., Donnybrook Regional Tourism Association Inc. and Balingup & Districts Tourism Association Inc.

Maintain the status quo for 2015. LGAs work towards establishing an MOU to guide the regionalising of tourism and prepare to adopt a regional brand in mid 2016 to enable the production of regional marketing materials; in 2016 the LGAs jointly develop new self drive route maps and themed maps to replace existing maps, brochures and planners as stocks become depleted; in late 2016 the LGAs develop and launch a branded regional website with enhanced capability (mobile responsive, e-commerce, ticketing, booking, reviews, blogging, downloads, member services, etc); The recommended approach to governance is further outlined below and in the action plan.

1. LGAs immediately begin discussions on establishing a 'memorandum of understanding' that will outline cooperation in visitor servicing, tourism planning, tourism infrastructure, funding and resourcing, branding, marketing and events. A sample MOU is presented in the appendix.
2. The City of Bunbury becomes the principal coordinator of regional tourism, working closely with the six other LGAs and a working group (of respective LGA tourism staff). The initiatives within the action plan including those specified in the MOU become the basis for adopting a regional approach to tourism.
3. LGAs continue with the 'status quo' for 2015 but where possible make provision for an agreed amount of funding in FY2015/16 to launch a regional brand mid 2016. LGA budgets for FY2016/17 be revised to match the resourcing and obligations of the MOU and agreed actions taken from the action plan.
4. During FY2015/16 the LGAs collaborate in preparing ***draft*** maps for experience-activity themed self drive routes, themed itineraries / packages, a renewed regional holiday planner (for 2016), a regional website and an App. As the supply of existing maps, brochures and planners are gradually depleted the new regional maps and planner (including online digital versions) are introduced for distribution.

In parallel, tourism operators should be encouraged to establish a sub regional tourism organisation. Its primary focus should be on the development of packages incorporating accommodation, hospitality, activities-attractions, transport, tours, local services and events. This includes the promotion and advertising of packages through conventional mediums as a well as establishing dialogue with inbound tour operators and tour wholesalers to promote packages via online distribution channels. A secondary focus is encouraging operators to improve their standards through accreditation and quality assurance. This includes organising workshops facilitated by Tourism Council WA, Australian Tourism Export Council, Tourism WA and the Small Business Development Corporation (WA) to encourage improvements to the organisational systems and practices of operators. The SRTO should also be encouraged to work closely with the alliance of LGAs in developing regional marketing materials, self-drive routes and regional promotion with ASW.

Recommended roles and responsibilities of a regional approach to tourism are shown graphically on the following page.



3.2 KEY PERFORMANCE INDICATORS

Monitoring implementation and progress of the strategy will require a range of key performance indicators. Usually there is data that exists within a region and if captured in a regional reporting format (i.e. annually) can provide effective indicators of progress towards achieving the goals and objectives of the tourism strategy. The recommended key performance indicators include:

- Shire-owned caravan/transit park occupancy rates (supplemented with ABS accommodation data).
- Number of nights overflow facilities are used and the number of campers-vehicles accommodated annually.
- Number of tourism brochures and holiday planners distributed annually via visitor centres and ‘information nodes’ within the towns (i.e. during peak and off-peak periods).
- Shire operated road traffic (vehicle) counters at popular day use sites and visitor areas in towns.
- Number of visitor enquiries received by phone and/or email at visitor centres annually.
- Tourism-related merchandise sales ($) at visitor centres.
- Number of visitors entering local museums, galleries and/or heritage displays annually (i.e. operated by LGAs).
- Visitors / trips to National Parks and Conservation Reserves managed by the Department of Parks and Wildlife annually.
- Visitor counts and/or estimates of patronage at events held across the region quarterly and annually.
- Installing pedestrian counters at popular day use sites and monitoring quarterly traffic levels (e.g. at Gnomesville, Marlston Hill Lookout, Ludlow Tuart Forest, Wellington Dam, etc.).
- Anecdotal measures from local business owners-operators e.g. sales, opening hours, stock levels, profitability, staffing levels, expansion plans, etc

3.3 FUNDING PRIORITY PROJECTS

A combination of funding options and approaches will be required in realising the development of tourism priorities and may include:

- Local government budgets
- Private investment
- Public private partnerships
- Federal Government grants (e.g. Tourism Demand Driver Infrastructure funds)
- Royalties for Regions (Investment Plan, Regional Grant Scheme, WAITOC and TWAs Aboriginal product development program)
- TWA's regional events funding scheme
- Lotterywest
- Regional Development Australia
- Partnering with community / social enterprises
- Miscellaneous State Government grants (http://grantsdirectory.dlg.wa.gov.au/GrantsSearch.aspx).

SECTION 4 - ANALYSIS

4.1 SITUATION ANALYSIS

TOURISM CONTEXT

In 2014 Australia ranked seventh globally in terms of tourism and travel competitiveness[19] (up from 11th in 2013). Many of Australia's strengths are sustainable including nature, coastal and wildlife experiences, food and wine offerings and safety. These elements are entrenched within the Geographe region and should be a focal point in promoting and developing tourism over the short-medium term. The Competitiveness Report also highlights the global shocks (terrorism, pandemics, economic crisis) that have impacted upon some countries and yet favoured others. The better performing countries are those "prepared to capture the opportunities of new trends; meet differing preferences of travellers from aging populations and a new generation of younger travellers; and the growing importance of online services and marketing, especially through mobile internet".

As at October 2014, Australia's tourism sector was characterised as follows[20]:

- Australia's tourism industry triumphed in 2013–14, with record-breaking arrivals and expenditure.
- holiday travel expenditure for domestic and international visitors continued to strengthen, with expenditure rising 4% and 7% respectively during 2013-14.
- the Chinese inbound visitor market continued to grow strongly in 2013-14 with 16% growth in visitor expenditure.
- Australians travelled overseas in record numbers in 2013-14, with increases in trips, nights and expenditure, but growth is slowing as the Australian dollar depreciates and the cost of overseas travel increases.
- Australia's domestic overnight travel increased in 2013–14 with trips increasing by 5.1%, nights stayed increasing by 3.1% and expenditure increasing by 3.6%.
- Western Australia was one of the top three performing States in 2013-14, largely driven by growth in domestic holiday and business travel, with nights stayed increasing by 10.5% and expenditure increasing by 3.9%, and the largest increase in day trip expenditure (14.5%).

In Western Australia, over the 12 months to September 2014, intrastate overnight visitor levels were up by 11.7% and daytrips were up by 9.6% and this generated an additional $359 million into the Western Australian economy. The strongest growth came from a 23% increase in nights stayed by intrastate overnight visitors. In comparison, Interstate visitor levels declined by 9.6% contributing to a 13.6% decline in interstate visitor nights, while international visitor levels declined by 5% contributing to a 4.8% decline in international visitor nights.

A 2011 (TRA) study[21] of domestic and international visitor perceptions of regional travel in WA identified a mix of active and passive activities were the key factors in motivating people to consider regional travel in WA. Travellers would consider driving to a regional destination if the trip included interesting places to stop along the way along with quality places to stay overnight. Barriers to visiting regional WA included the perceived high cost for transport and accommodation and the travel time required to reach a destination.

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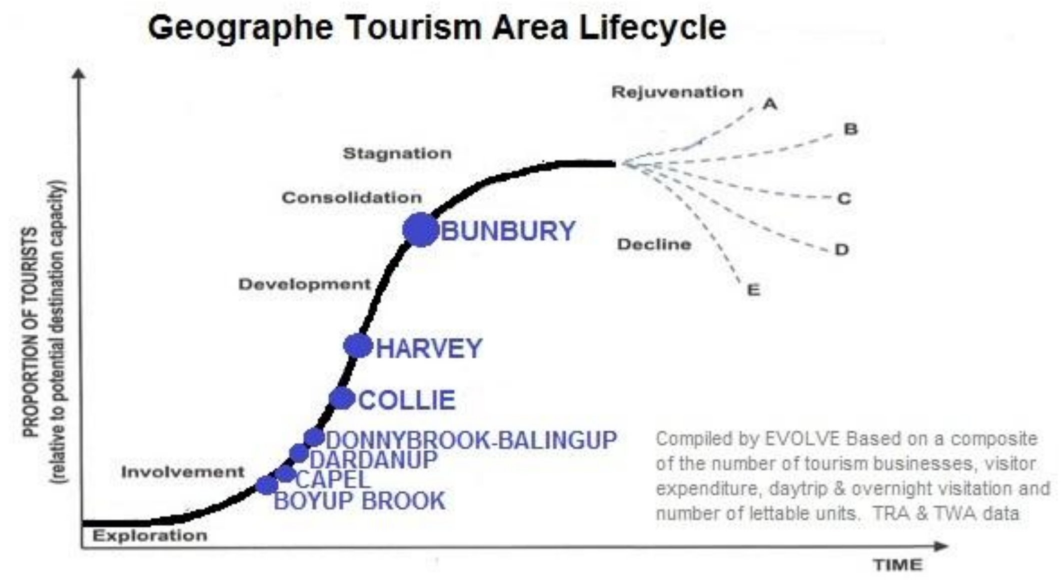
[19] R.Crotti & T.Misrahi (editors). *The Travel & Tourism Competitiveness Report 2015.* World Economic Forum. May 2015.

[20] Tourism Research Australia. *State of The Industry. October 2014.*

[21] Tourism Research Australia. *Destination Visitor Survey – Strategic Regional Research, Western Australia. Eco Accommodation Product Development Research. Summary of Results*. October 2011.

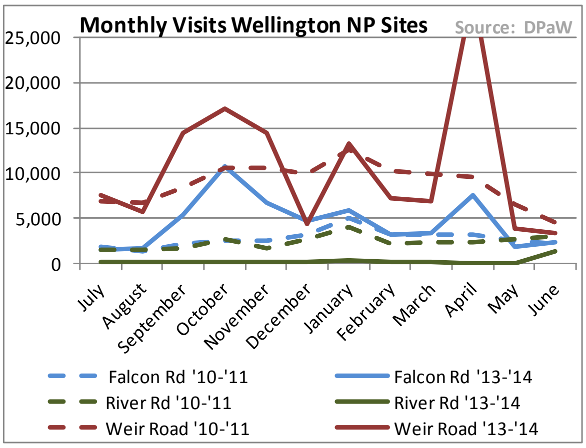
TOURISM AREA LIFECYCLE

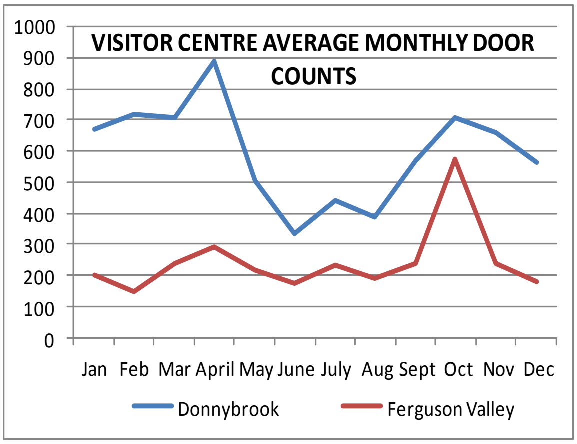
The Tourism Area Life Cycle is a concept used to track the progress of a tourism region as reflected by the number of visitors, lettable units, visitor expenditure and tourism businesses. The chart below shows Bunbury and Harvey are at later consolidation- development stages respectively in the lifecycle compared to other municipalities in the region, which are at earlier involvement stages. Competing destinations and regions are generally at later stages in the lifecycle having higher levels of infrastructure, businesses and visitation and more sophisticated approaches to marketing and planning. Why is it that the Geographe region has not developed further as a popular destination? The answer may be due to several underlying causes. 1. The Margaret River-Busselton region (i.e. the 'Capes') has been a drawcard for investment and visitors since the 1980's and Geographe has not matched the tourism appeal or development. 2. Geographe hasn't offered an iconic experience or high profile attraction(s) that visitors desire to visit. 3. Tourism across much of the Geographe has been LGA-driven with towns branded as destinations, supported mostly by boutique-scale tourism enterprises, relegating tourism to a second-tier industry. 4. The limited supply and mixed scale quality accommodation, disparate way finding tools and minimal collaboration in developing regional infrastructure has fragmented the tourism offering. Evolution along the tourism lifecycle requires the region to address branding and marketing; quality assurance and tourism accreditation; governance via a Sub Regional Tourism Organisation; coordinated development of tourism infrastructure, product and events; and partnerships with travel agents, tour wholesalers and destination marketing groups. The challenge is growing sustainably whilst keeping the region's 'boutique' scale to maintain a level of personal service and collaborating in dispersing visitors across the region to leverage the available capacity.



SEASONALITY

Monthly visits to Wellington National Park (shown below) provide an indication of tourism seasonality. Comparing selected sites in 2010-11 and 2013-14 the peak visitation occurred in October (e.g. school holidays, spring wildflowers) and near-peak visitation in April (e.g. Easter, Anzac, school holidays) and January (summer school holidays). The shoulder periods occurred in September, November, January, February and March (i.e. spring and summer). Off-peak low visitation occurred in May, June, July and August (i.e. winter). This amounts to 3-months peak visitation, 5-months shoulder period and 4-months off-peak low period. Seasonality is similar at the Donnybrook and Ferguson Valley visitor centres (as shown below). Peak visitation coincides with half of the region's events occurring in October and April. Programs to extend the visitor season could include new events in shoulder periods, new experiences in low periods (e.g. rafting, lake diving, road cycling), targeted offerings during low/shoulder periods (e.g. hospitality-wine packages), themed self drive routes promoted as weekend getaways and participation in ASW's winter escapes program.

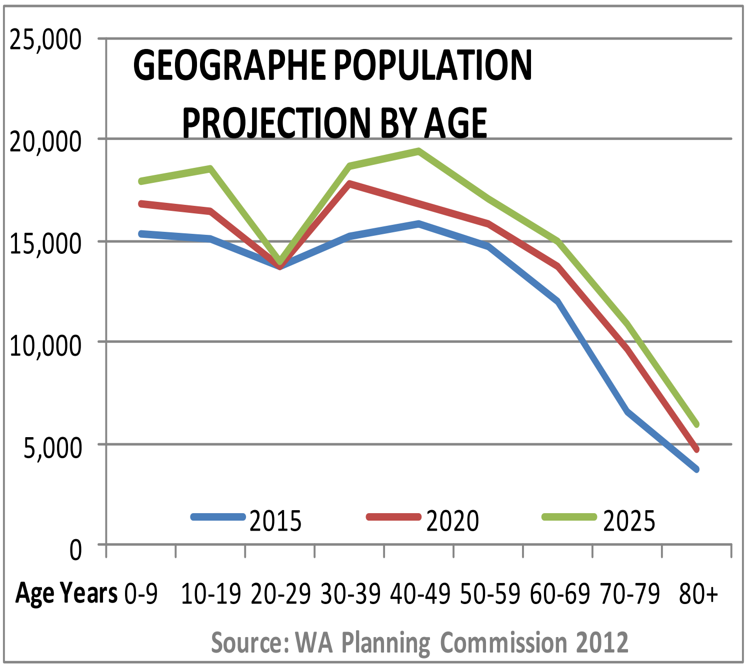




POPULATION[22]

Population projections for Geographe (including Boyup Brook) show an increase in total population from 112,420 (2015) to around 137,700 by 2025, a 22% or 25,280 increase over ten years. Projections indicate significant growth in 30-60y.o. age groups, which are important drivers of the "visiting friends and relatives" visitor segment. This can be expected to drive growth in day trips, short overnight trips and 'getaways' across the region. Population growth has potential to help grow the VFR segment from around 164,200 in 2011-13 to around 205,000 in 2025, a 25% increase in the VFR segment. Targeted marketing to residents could help stimulate growth in the VFR segment.

The projections (right) suggest no growth in the 20-29y.o. age group during 2015-2025, meaning the labour 'pool' is expected to offer fewer 20-29y.o. compared to 30-50y.o. Projected increases in population may improve the quality (or depth) of the labour pool across the region. Slowdown in the mining-resource sector could contribute towards higher levels of investment in the tourism sector (e.g. residents creating self-employment, families creating family enterprises, sea-tree change, rural properties entering tourism, etc).



[22] Department of Planning. *Western Australia Tomorrow. Population Report No. 7, 2006 to 2026. Forecast Profile for LGAs.* February 2012. In this instance Band 'C', median values, are used.

GEOGRAPHE TOURISM 2015

As at 2015, tourism in the Geographe region can be characterised as follows:

- Bunbury city is a significant hub in close proximity to fourteen rural towns; Collie and Wellington National Park are popular for outdoor-adventure; Ferguson Valley is popular for wine-food-arts; Harvey-Brunswick and Donnybrook-Balingup host wine-food stopovers along the Harvest Highway; Boyup Brook is the country music capital of WA.
- Major attractions include the Dolphin Discovery Centre, Ferguson Valley, Wellington NP, Ludlow Tuart Forest NP, Logue Brook Dam, Bunbury CBD, beaches-waterways, Gnomesville, Lena Dive Wreck, Apple Fun Park (playground), five major rivers and five significant Dams.
- Nearly 50 large[23] events are held annually in the region including Groovin' the Moo, Boyup Brook's Country Music Festival, Harvey Dickson Rodeo, Donnybrook's Apple Festival and food & wine festivals, Dardanup's Bull & Barrel Festival and many sporting events.
- Towns are promoted as distinct destinations, competing mostly against neighbouring towns; not all LGA-based tourism brochures encourage visits to neighbouring towns or shires.
- Accommodation capacity of approximately 2700 beds is dominated by older-aged facilities, 3 star quality, varied size, and many B&B's, farmstays, chalets and studios; an increasing number are promoted on global booking sites such AirBnB, Stayz, etc.
- An estimated 300+ tourism enterprises across the region comprising a mix of formal, semi-formal, lifestyle and 'pop-up' operations; mixed operating hours, varying standards, assorted marketing, with many geared to holiday and peak visitor periods.
- Holiday planners, tourism brochures and some maps are rich in detail but generally provide poor way-finding[24] and are of limited use when trying to locate places of interest; there is limited half-full day itineraries and limited 'regional' drive-routes; tourism websites offer varied quality of information; information for pre-trip planning is satisfactory, however, once in the region there are information gaps that could easily disappoint visitors.
- Directional signage is of a mixed, varied quality; some signage is easily missed or absent; despite often short distances between sites nearby sites are rarely pointed out; can be difficult finding some sites, especially in rural areas;
- Caravan and Transit parks are available in most towns; Boyup Brook is the only RV Friendly town; camping is available in Wellington NP plus a few informal and DPaW camping sites; most towns have overflow sites to cater for a temporary surge in visitors.
- The region hosts five tourism groups; most are volunteer-based with limited budgets and resources; their primary focus is operating their respective visitor centre(s) and/or managing promotional programs (i.e. website, maps, brochures, events, trade shows, etc); most are LGA-focused with limited capacity or charter to address regional tourism.
- Bunbury's ability to grow cruise ship tourism is constrained by limited supply of high-quality tourism products-services to captivate passengers or ship operators; restricted size of ship berth and draft (that cannot be easily dredged or deepened); and competing destinations attracting scheduled arrivals to the detriment of Bunbury; scope for Bunbury to develop a jetty facility for cruise ship tenders to ferry passengers from cruise ships anchored offshore; and scope to bus passengers disembarking at Busselton into Ferguson Valley and Koombana Bay (Dolphin Centre); and scope to attract smaller size cruise ships into Bunbury;

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[23] A list of *significant* events in the region is presented on page 15.

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

INDIGENOUS TOURISM

Much of the region's potential for indigenous tourism is centred on Roelands Village and supporting the indigenous community to facilitate training, employment and enterprise. Roelands is committed to projects such as a food-processing facility, bush-food products, the growing of bush foods, a bush foods cafe and short stay accommodation. Roelands and the aboriginal community are closely linked to the not-for-profit Outback Academy (www.outbackacademy.org.au) which aims to help indigenous communities build independence and sustainability (i.e. reduce welfare dependency, reduce government intervention, strengthen self-governance & determination). Funding is required to facilitate some of the projects that could be administered by the Outback Academy.

Celebrity chefs Mark Olive and Robert Taylor have been working with Roelands to build its profile in bush foods and bush tucker via training and apprenticeship schemes, bush-inspired gourmet events and gourmet catering. The region has a limited[25] range of aboriginal tourism product however the formation and resourcing of partnerships with Roelands (e.g. involving WAITOC, TWA, ASW, CCIs) could be instrumental in developing tourism opportunities and potentially creating Roelands as a 'hub' for indigenous tourism.

The recent Native Title agreement with the South West's Noongar people has potential to bring a range of economic opportunities including tourism ventures in the Geographe region.

EVENTS

The region hosts around 52 medium-large events[26] annually with most scheduled in October (14), November (7), March (6) and April (6). Many of the events are organised by the LGAs, community interest groups or private enterprise. Common event themes include food-wine, music-entertainment, agriculture / farms, gardens / nature and sport-recreation. Bunbury and Balingup dominate the event calendar sharing 21 of 49 events. Potential gaps in the event program include adventure-sports and fee-paying music-performance events, noting also that very few events are held in January, June, July and September. Events that span across towns or extend across a long weekend are also limited. A high concentration of food events are held in November and a diverse mix of events are held in October, requiring significant resources over two months. A regional event alliance could be formed, possibly incorporating Bunbury's Event Coordination Group, to organise prioritising, theming, value and sustainability of the region's event program (e.g. visitor origins & levels, net benefit/cost, media exposure, funding, participation-support, etc). Events should focus on theming consistent with the region's positioning and branding (e.g. sports, entertainment, adventure, food-wine) and attracting visitors in shoulder and off-seasons. Many of the region's larger events[27] are shown on a following page.

[25] Ngalang Wongi Aboriginal Cultural Tours in Bunbury is the main provider of aboriginal tourism experiences in the region

[26] This assessment excludes smaller local and sporting events.

[27] Sporting events are significant in attracting participants and visitors and pose significant potential to increase daytrip visitation across the region but are not itemised in the list of regional events shown above.

	EVENT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
1	Harvey Harvest Festival			■									
2	Donnybrook Applefest				■								
3	Balingup Small Farm Field Day				■								
4	Cinefest OZ, Bunbury								■				
5	Balingup Medieval Carnivale								■				
6	Collie Wildflower Show										■		
7	Christmas Carnival, Bunbury												■
8	Bull and Barrel, Dardanup										■		
9	Dolphin Festival, Bunbury										■		
10	Country Music Festival, Boyup Brook		■										
11	Aqua-Spectacular, Bunbury			■									
12	Viva Bunbury			■									
13	Collie Adventure Race										■		
14	Paddock Picnic, Balingup										■		
15	Festival of Country Gardens, Balingup					■						■	
16	Street Food Standoff, Balingup										■		
17	Harvey Dickson's Rodeo, Boyup Brook										■		
18	Multicultural Night Under the Stars, Bunbury		■										
19	SW Autumn Racing Carnival, Bunbury			■									
20	Collie Cup										■		
21	Railway Picnic, Boyanup										■		
22	Dardanup Art Spectacular					■							
23	Relay for Life, Bunbury											■	
24	Taste of the Region, Bunbury											■	
25	Geographe Crush Food & Wine Festival, Boyanup											■	
26	Australia Day Breakfast, Harvey	■											
27	Collie River Valley Show											■	
28	Antique fair, Boyanup									■			
29	Food & Wine Festival, Donnybrook											■	
30	Telling Tales, Balingup							■					
31	Southwest Fashion Festival, Bunbury		■										
32	Bunbury Show				■								
33	Groovin' The Moo, Bunbury					■							
34	Blackwood Marathon, Boyup Brook										■		
35	Harvest & Arts Festival, Donnybrook				■								
36	Harvey Agricultural Show				■								
37	Brunswick Agricultural Show										■		
38	Golden Valley Tree Park Spring Picnic, Balingup										■		
39	Dardanup Heavy Horse Show					■							
40	Surf to Surf Fun Run, Bunbury										■		
41	Eaton Foreshore Festival, Dardanup			■									
42	Ferguson Valley Taste Fest, Dardanup				■								
43	Tulips with a Difference, Boyup Brook									■			
44	Taste of the Blackwood, Boyup Brook & Balingup						■	■	■				
45	Blackwood Valley & WA Boutique Wine Show										■		
46	Bunbury Cup			■									
47	Upper Blackwood AG Society Show, Boyup Brook											■	
48	Bunbury Australia Day Celebrations & Skyfest	■											
49	Mayanup Camp Draft, Boyup Brook		■										
	TOTAL NUMBER OF EVENTS PER MONTH	2	4	6	6	4	1	2	3	2	14	7	1

4.2 VISITOR MARKET & OUTLOOK

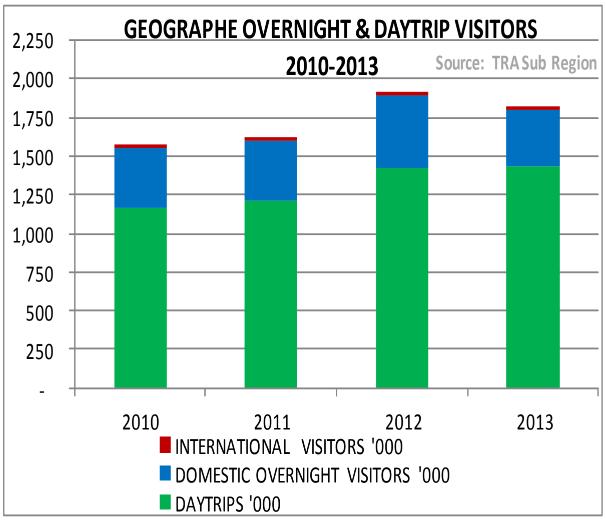
In this section, visitor market profiles are based on data taken from *Bunbury's Overnight Visitor Fact Sheet (Tourism WA ,* which is sourced from Tourism Research Australia's IVS and NVS for 2011, 2012 and 2013 and averaged so as to improve the reliability of the data (note the TRA Bunbury data does ***not*** include the Shires of Donnybrook-Balingup or Boyup Brook but does include Waroona[28], which is outside the study area). Where this data has been used it is referenced as 'TRA Bunbury'. Visitation and visitor nights for the sub region (2010, 2011, 2012, 2013) are based on custom data

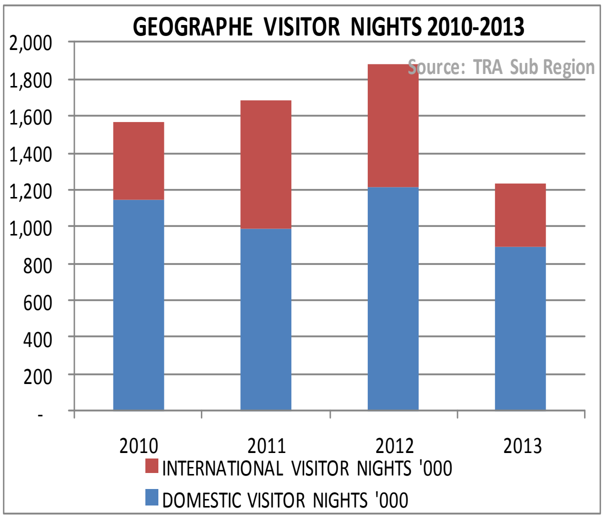
28 This is due to TRA adopting ABS statistical areas as the basis for collecting and reporting tourism data Australia-wide. LGA boundaries do ***not*** match statistical areas used by the ABS or TRA, hence LGA-based tourism data will differ from statistical area data.

sourced from Tourism Research Australia (i.e. all 7 LGAs). Where this data is used it is referenced as 'TRA Sub Region'.

VISITOR MARKET - VISITATION[29]

- Daytrip visitors comprised 78% of all visitors; domestic overnight 20% and international 2%.
- Daytrips: 1,429,000p.a. in 2013, above average and trending upwards (4yr average 1,307,000).
- Overnight visitors: domestic overnight visitors comprised 94% and International visitors 6%.
- Domestic overnight visits: 369,000p.a. in 2013, below average, generating 891,000 visitor nights and trending downwards.
- Domestic overnight visitors stayed 2.6 nights on average, generating 1,061,000 nights annually (i.e. 94% of overnight visitors account for 67% of nights stayed)
- International visits: steady at 28,000p.a. in 2013 generating 347,000 visitor nights, below average and trending downwards (4yr avg. 531,000 nights p.a.).
- International visitors stay 19 nights on average, generating 531,000 nights annually (i.e. 6% of overnight visitors account for 33% of nights stayed; largely due to backpackers & seasonal workers).
- International visitors comprise 6% of overnight visitors, well below the WA State average of 11%.
- Average length of stay has fallen from 3.7 to 3.1 nights during 2010-2013.



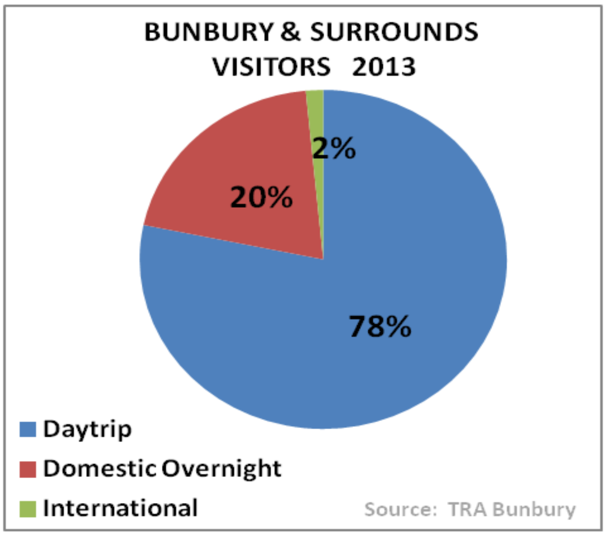


IMPLICATIONS

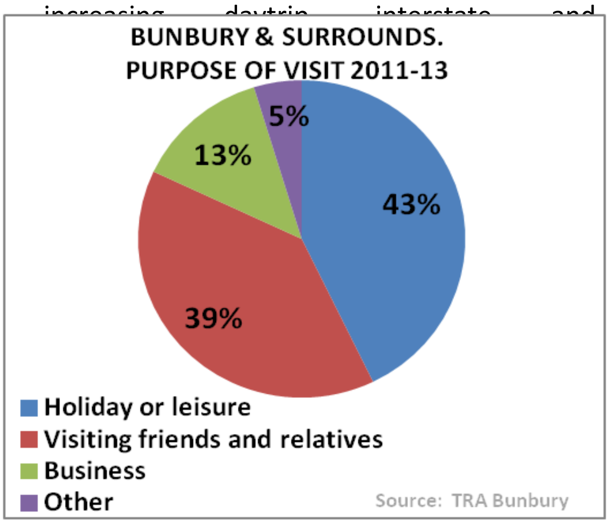
- Day trips increased 23% during 2010 to 2013.
- Domestic and international visitor nights decreased 22% and 16% respectively, 2010 to 2013.
- Market share of WA's domestic overnight visitors fell from 7.5% to 5.4%, 2010 to 2013.
- Visitor expenditure was an estimated $305,000,000 in 2013 below the 2010-2013 average.
- Market share of *all* WA visitors steady at around 8% during 2010 to 2013 (i.e. no gain).
- Increase in daytrips possibly due to increase in mountain bike activity, upgrade to campgrounds, opening of Forrest Highway and rising popularity of festivals and wine-food tourism.
- Decline in domestic overnight visitors possibly due to a fall in business activity, popularity of overseas holidays or competing destinations, reduced discretionary spending and no iconic experiences in the region.

[29] Source: Tourism Research Australia. *Regional LGA Profiles 2010-2013.* Selected LGAs. October 2014.

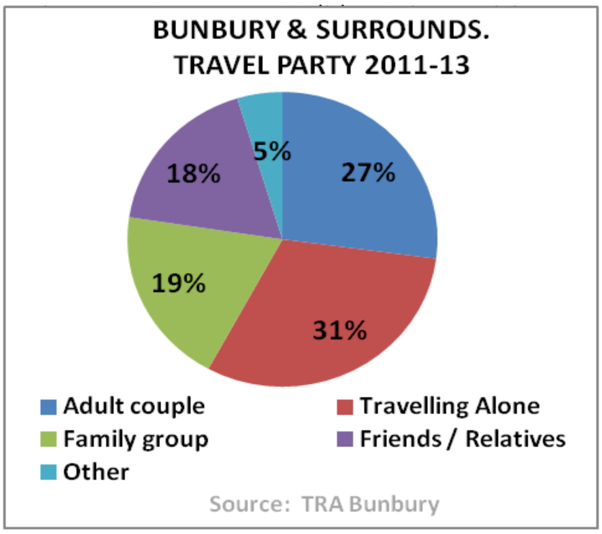
VISITOR MARKET - PROFILE[30]



- Day trips are the biggest visitor group (78%).
- Intrastate (WA) visitors are 85% of domestic overnight visitors but only stay 53% of domestic nights.
- Interstate visitors are 15% of domestic overnight visitors and stay for 47% of domestic nights.
- International visitors represent 6% of overnight visitors but stay 33% of total nights.
- Domestic visitors stay 2.6 nights avg. International visitors stay 19.7 nights avg (incl. seasonal workers & backpackers).
- The region could benefit significantly by increasing daytrip, interstate and

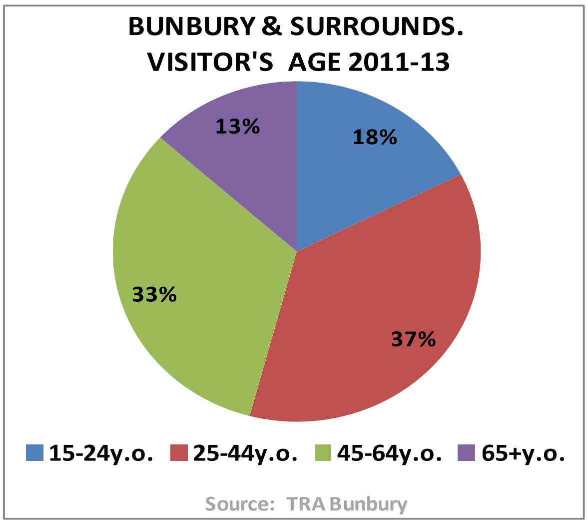


- Holiday or leisure is the main purpose of visit (43%), with 'Visit Friends & Relatives' accounting for 39% of visits.
- 82% of visits are for holiday, leisure & VFR, yet 58% of visitors *stay* with Friends & Relatives.
- Business visitors (13%) are an important group, staying Mon-Thurs, attending conferences and events, and supporting facilities year round.
- The region can benefit by promoting events & recreation to rural communities, encouraging day trips and event visitation; and promoting holiday itineraries to



- Adult Couples, 27% of visitors, include Nomads & Weekenders, a growing segment.
- Travelling Alone (31%), globally significant & growing group (Internationals + Nomads).
- Family Groups & Friends/Relatives, 37% of visitors, many *stay* with Friends & Relatives.
- 30% of visitors stay in commercial accommodation, mostly business, interstate and international visitors.
- 12% of visitors stay in caravan parks / campground, mostly families, friends & backpackers.
- Suggested itineraries and options, promoted via TV, print & online, to grow daytrips & overnight stays could benefit the region.

[30] Source: Bunbury Overnight Visitor Fact Sheet. Years Ending December 2011-2012-2013, Tourism WA. (Tourism Research Australia)



- Largest age group is 25-44y.o., singles, couples & young families; 37% of total.
- 45-64y.o. second largest age group, mature families, empty nesters & early retirees; 33% of total, 1-in-3 visitors 45-64y.o.
- 15-24y.o., 18% of total, singles, couples and young adults; around 1-in-5 visitors 15-24y.o.
- 65+y.o., smallest age group, singles and couples, 'nomads', visiting friends & relatives;

VISITOR MARKET - SEGMENTS

Consistent with Tourism Australia and Tourism WA's target market audiences, the region hosts five different tourism visitor segments[31] and these are targeted in *existing* marketing campaigns. The five visitor segments are listed below and further details are presented in the appendix.

1. Dedicated Discoverers
2. Aspirational Achievers
3. Grey Explorers
4. Family Connectors (WA-based)
5. Experience Seekers (International)

The 2009-2014 City of Bunbury Tourism Strategy identified six visitor segments as potential targets, which are outlined below and further details are presented in the appendix.

1. Business travellers
2. Visiting friends and relatives
3. Day Trip family
4. Nature based backpackers
5. Perth holidaying families
6. Weekend escape couples

Demographic segmentation, based on age, provides an alternate basis to segment the visitor market and highlights potentially important elements influencing the regional tourism strategy.

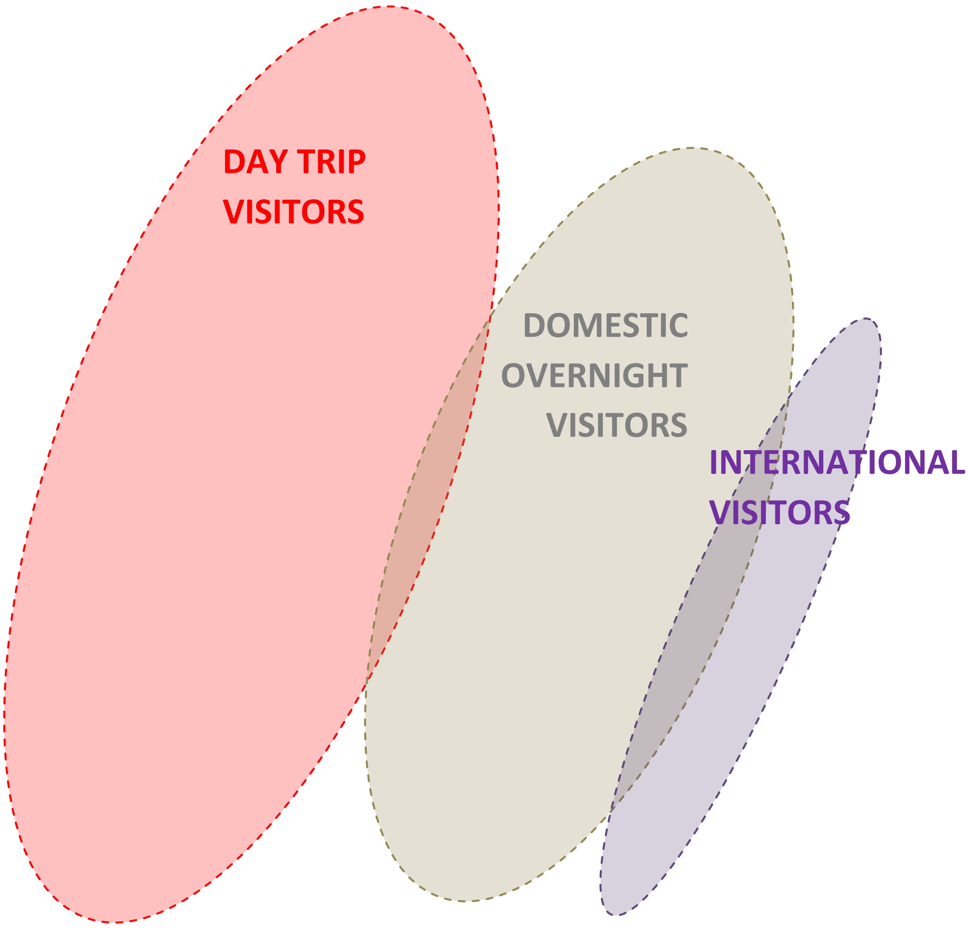
1. **Generation Z**, age 6-19y.o., technology aware, environmentally conscious & ambitious 'screenagers'.
2. **Generation Y**, age 20-33y.o., technology-savvy, experience seeking, demanding and want-it-now 'millennials'.
3. **Generation X**, age 34-51y.o., educated, independent, globally & technology aware, focused on family and work/life balance.
4. **Baby Boomers**, age 52-69y.o., accomplished, wealthy, idealistic, technology-limited & want to experience it all.

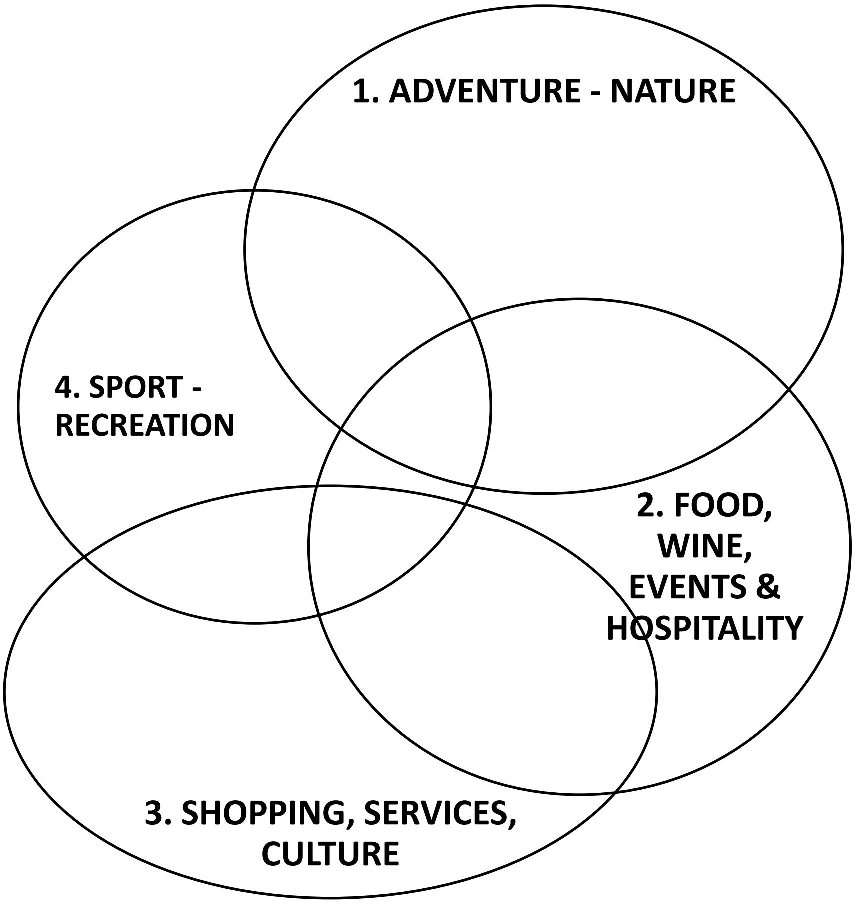
[31] Based on Tourism WA *Revisiting the Domestic Target Segments* January 2014; Roy Morgan *Travel Segments* 2014; Tourism Australia *Experience Seekers*, 2010, and Tourism Australia *Marketing to the Experience Seeker* 2007.

Gen X, Y and Z are an estimated 70% of visitors and are considered technology savvy meaning they are competent in using digital/online sources of information without relying on face-to-face or print formats. In comparison the Baby Boomers are a significantly smaller group in the region's visitor market (est. 20% of visitors) and are considered to have the lower levels of technology competency and usage, which means they require visitor information in multiple formats including face-to-face, print, digital and online. The region needs to offer visitor information in multiple formats, meeting the preferences and capabilities of all age groups, until the Baby Boomer cohort peaks at around 2028 when face-to-face and print formats are expected to have become obsolete.

The region has four main areas of appeal that would motivate visitors to visit. These four areas of appeal (numbered 1 to 4 below) extend across day trip and overnight visitors (e.g. a day trip visitor might visit for sport-recreation purposes but also undertake some shopping and hospitality services; or an overnight visitor might visit for adventure-nature purposes but also visit an event and a winery). The four areas of appeal overlap the three visitor types giving the basis used to target visitors in the marketing plan, which is shown graphically below.

1. **ADVENTURE-NATURE**: with interests in mountain biking, canoeing, camping, fishing, diving, cycling, swimming, and rivers, forest, beaches, wildflowers, birds and natural environments.
2. **FOOD , WINE, HOSPITALITY & EVENTS**: with interests in cafes, restaurants, wine, produce, events,.
3. **SHOPPING, SERVICES & CULTURE**: with interest in shopping, services (medical, commercial, general), heritage, art-craft, performances and entertainment.
4. **SPORT AND RECREATION**: with interest in sport, recreation and competitive team activities.





Business visitors are an important segment of the visitor market accounting for 13% of visitors. Their main interests are related to the region's economy and commercial activities such as mining, energy, transport, construction, agribusiness, health, education and services. Their value to the tourism economy is related to accommodation, conferences, seminars, training and hospitality. They transcend across day trip and overnight visitors.

VISITOR MARKET OUTLOOK

The Geographe region offers a range of factors that motivate visitors to visit. The table below provides an indication of the extent to which the region has leveraged these factors and where scope exists to increase the 'motivation to visit'. The extent to which some or all of these factors are further developed is important in influencing future visitation to the region.

CORE APPEAL – MOTIVATION TO VISIT	EXTENT LEVERAGED
Coastal environs.	Adequate at Bunbury's Back beach, Koombana Bay foreshore and coastal inlets; Quieter coastal nodes (beaches) are under-promoted (e.g. Myalup, Peppermint Grove, Binningup, etc).
Forest & undisturbed nature.	Adequate at Wellington NP & Crooked Brook Forest; Some prominent landforms, natural features and bio-intensive sites are undeveloped or under-promoted.

Heritage and local history.	Adequate in towns (e.g. walk-drive trails, maps, signage). Regional perspectives & linkages are adequate.
Marine & Aquatic environs	Adequate at Logue Brook & Harvey dams, Collie River, Glen Mervyn & Stockton Lake; access to Blackwood & other major rivers is under-developed & under-promoted. Lake Kepwari & Black Diamond Pool are under-developed & under-promoted.
Flora, fauna and natural scenery.	Bio-intensive areas (e.g. rivers, creeks, lakes, wetlands, inlets) are semi-developed, some highly accessible, others under-promoted or have limited access.
Adventure	A range of mountain bike & hiking / walking options, near adequate; white water rafting under-promoted; lake diving under-developed & under-promoted; soft adventure[32] under-promoted.
Arts and culture	Adequate in Bunbury. Adequate in regional areas but access is under-promoted. Indigenous experiences under-developed.
Food & Produce	Adequate in Bunbury. Under-promoted in regional areas. Produce sites under-promoted, linkages under-developed.
Shopping	Adequate in Bunbury. Under-promoted in regional areas (e.g. weekend markets, galleries-studios, niche outlets).

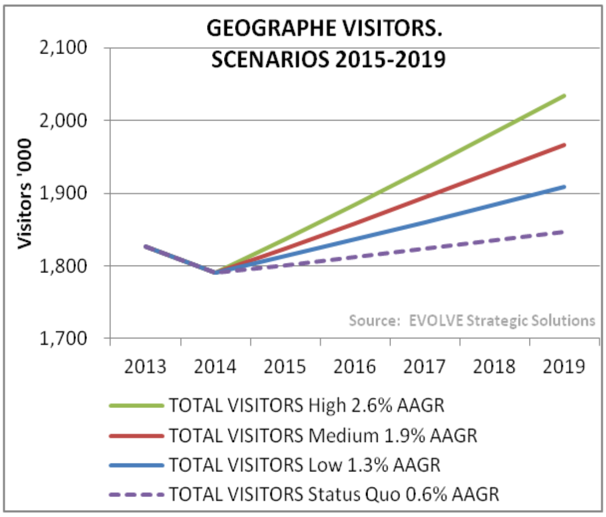
Increasing visitation across the Geographe region is dependent upon a range of factors that can change at relatively short notice (e.g. Aus$, interest rates, fuel price, cost/risk/appeal of overseas travel, extreme weather, household disposable incomes, etc). Visitor projections for the Geographe region have been prepared based on anticipated progress in regionalising tourism leading to a more robust and sustainable tourism sector. Using the status quo (i.e. change nothing) as a benchmark, three visitation scenarios were developed as outlined in the table below with projected visitor levels and visitor nights shown on a following page.

SCENARIO	ASSUMPTIONS & RATIONALE
Low Growth	Minimal investment in tourism infrastructure & product; minimal addition to activities & experiences offered; minimal regional collaboration; fragmented promotion & branding prevails; minimal investment in self-drive routes; minimal improvements in way-finding tools; Low **1.3%p.a.** average growth in visitation;
Moderate Growth	Modest investment in tourism infrastructure & product; notable additions to activities & experiences offered; regional collaboration emerging; regional promotion & branding gains momentum; self-drive routes dispersing visitors across the region; new tourism ventures established; moderate **1.9%p.a.** average growth in visitation;
High Growth	Moderate investment in tourism infrastructure & product; new, additional & unique activities & experiences offered; regional collaboration driving growth & opportunity; branding & promotion delivers a regional identity; extended visitor season, strong regional profile & appeal, increased visitation; moderate-high **2.6%p.a**. average growth in visitation;

Underlying the forecast, the medium term outlook for tourism is favourable based on the following: Low Aus$, below average fuel price, low interest rates, near-trend GDP, near-trend unemployment, below trend investment; above trend international visitation; near trend domestic travel including daytrips; and below trend outbound travel by Australians; Overall: the recent headwinds limiting

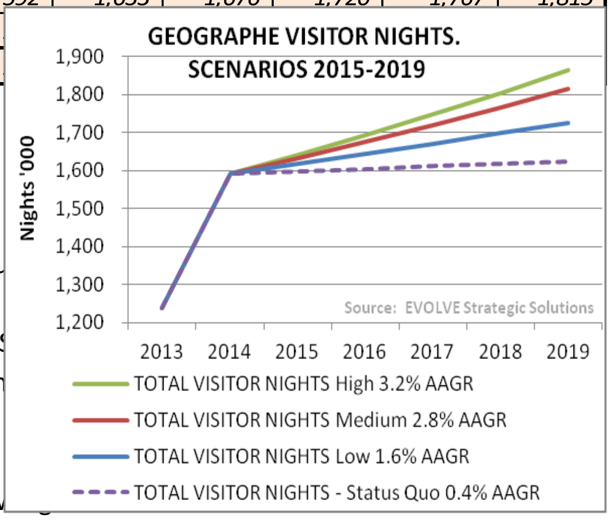
[32] Soft adventure is generally low risk, requires minimal experience and is often more convenient; can include bicycling, snorkelling, fishing, canoeing, walking, wildlife viewing and swimming.

growth in Australia's domestic tourism may soon become tailwinds helping to stimulate growth in domestic and international visitation; this could translate into increased visitation to the Geographe region. This has been factored into the projections shown below (note, the status quo is included for comparative purposes).



GEOGRAPHE VISITORS 2014-2019 ('000)	2014	2015	2016	2017	2018	2019
TOTAL VISITORS Low 1.3% AAGR	1790	1,813	1,836	1,860	1,884	1,908
TOTAL VISITORS Medium 1.9% AAGR	1790	1,824	1,859	1,894	1,930	1,966
TOTAL VISITORS High 2.6% AAGR	1790	1,836	1,884	1,933	1,983	2,035
TOTAL VISITORS Status Quo 0.6% AAGR	1,790	1,801	1,813	1,824	1,836	1,847

GEOGRAPHE VISITOR NIGHTS 2014-2019 ('000)	2014	2015	2016	2017	2018	2019
TOTAL VISITOR NIGHTS Low 1.6% AAGR	1,592	1,617	1,643	1,670	1,698	1,727
TOTAL VISITOR NIGHTS Medium 2.8% AAGR	1,592	1,633	1,676	1,720	1,767	1,815
TOTAL VISITOR NIGHTS High 3.2% AAGR	1,	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
TOTAL VISITOR NIGHTS - Status Quo 0.4% AAGR	1,	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]



4.3 TOURISM AUDIT

A desktop audit of each Shire investigated the tou accommodation and access (i.e. 6-A's of tourism). and opportunities and the scope to leverage each S below including a summary of tourism planning in Plans and Corporate Business Plans.

The region's tourism capacity is based on the follov
- 314 Attractions & 300 Activities
- 192 Accommodation facilities
- 75+ Awareness (communication) modes
- Significant stock & capacity to support growth in tourism
- Some duplication but no discernible gaps.

The region's tourism could potentially benefit from:
- More accommodation (i.e. a steady, gradual increase in capacity)

- More places for activities (i.e. an increase in choice)
- Dispersing visitors across the region (i.e. via themed drive routes and regional maps)
- Rationalise and combine communication (i.e. visitor centres, maps, brochures, websites)

Of the 6-A's, administration is reported elsewhere within this document. Amenities were taken as public toilets, signage, telecommunications, emergency services, picnic facilities, boat ramps, parking areas, rubbish bins, water fountains and general services. Information on amenities was scant and irregular (i.e. a gap to address) and subsequently not reported in detail in this section.

CITY OF BUNBURY TOURISM AUDIT FINDINGS

Bunbury is a regional city, port and hub located 180km south of Perth, 1.5 hours drive. Bunbury has a significant stock of accommodation, with a prominent array of shopping, hospitality and entertainment options, supplemented with a mix of nature, heritage, culture, recreation, sport, aquatic and adventure activities and attractions. Awareness is communicated through three websites (Bunbury Visitor Centre, ASW and TWA), two holiday planners (Bunbury-Geographe and ASW), maps-brochures, tourist radio, social media and Bunbury Visitor Centre. Access is year round via the Forest Highway from Perth or the Albany / Southwest highways from the southeast. The City is serviced twice daily by trains from Perth as well as regular bus / coach lines, and also has an airport for light aircraft, a safe harbour for boats and yachts, and a local bus service operating within the city boundaries. Bunbury hosts a range of events, drawing visitors from Perth and the surrounding region. As a regional city, Bunbury is also a prominent business centre and business visitors patronise a significant share of Bunbury's accommodation and tourism infrastructure. The number of sites / establishments identified in the tourism audit are shown below.

ACTIVITY	ATTRACTION	ACCESS	AWARENESS	AMENITY	ACCOMMODATION
92	76	6	11		61

GAPS:

- Some of the short stay accommodation is aged, of mixed standards and is in contrast to what visitors might expect of a 'city' in terms of quality facilities.
- 5 star accommodation and RV (24hr) stopover facilities are limited.
- The visitor centre is located within a shopping precinct, in the centre of town, where driving and parking long vehicles (e.g. towing vans / trailers) can be difficult.
- Bunbury under-promotes the quieter, natural, lesser-developed places, reducing the choices available to visitors.
- Bunbury's public amenities are not well mapped making it difficult to find essential facilities (e.g. toilets, water, BBQ's, picnic sites, etc).

OPPORTUNITIES & PRIORITIES:

- Encourage investment in accommodation, for example serviced apartments, B&B's, backpacker / flashpacker lodges (i.e. up market), caravan / transit parks, a five-star resort-hotel; and support the use of residential (share) accommodation for short stay visitors.
- Encourage the development of tours, hires/rentals and cultural activities/attractions, increasing the range of experiences available to visitors and as potential product to package.
- Develop a wider range of *regional* itinerary options and shore-based activities for cruise ship and high-yield visitors.

- Encourage half/full day self-drive routes extending into the broader Geographe region by incorporating experiences in wine-hospitality, art-culture, adventure-recreation and food-produce and detailed in maps, signage and at prominent stopovers.
- Develop a wharf (jetty) facility for cruise ship tenders and passengers to embark/disembark.
- Develop suggested itineraries (half and full day) and themed self-drive routes encompassing Bunbury and the regions popular experiences.
- Encourage wider promotion of regional food and produce; support mobile food service facilities at events and popular locations (supplying locally grown foods); encourage stronger linkages between regional food-produce suppliers, itineraries and drive routes.
- Develop targeted communications to grow business tourism (MICE, visits) via partnerships with business groups (e.g. CCI, Rotary, Apex, Lions, etc), packages / itineraries and online.
- Expand the visitor experience year round through greater diversity in recreation and soft adventure, theme park, hires/rentals, events/sports, tours, viewing areas and a shore-side tourist hub (e.g. at KBSC, Dolphin DC, Koombana North, Marlston North).
- Continue development of Bunbury Wildlife Park and Big Swamp as nature-based attractions.
- Support upgrades to Koombana Bay foreshore, marina and Outer Harbour redevelopment.
- Investigate collocation of Bunbury Visitor Centre at the Dolphin Discovery Centre and the outsourcing of visitor servicing to the Dolphin Centre.

HARVEY TOURISM AUDIT FINDINGS

The Shire of Harvey is a prominent producer of beef, dairy, citrus and wine and extends from the coast to inland, covering a range of landforms (dams, rivers, estuary, beach, escarpment). Tourist attractions include a brewery, wineries, the big orange, cheese factory, Leschenault Waterways Discovery Centre, the Yarloop Steam Workshops, Hoffman Mill, and Harvey and Logue Brook dams . The Shire's tourism is generally well developed and well organised. Awareness is driven mostly through two visitor centres, a collection of maps, a website and a local holiday planner. Access is primarily by sealed roads-highway, with a network of mostly sealed roads across the shire, and regular public bus-coach services to/from Perth linking with major towns of the south west. The Shire has several walk or bike trails (23), self-drive trails (9) and a range of attractions dominated by heritage (21), hospitality (10), winery (7) and nature (6). Visitor amenities are dispersed across the Shire, generally in proximity to popular day use areas and are reasonably well presented on maps. The number of sites / establishments identified in the tourism audit are shown below.

ACTIVITY	ATTRACTION	ACCESS	AWARENESS	AMENITY	ACCOMMODATION
59	57	3	15	53	26

GAPS:

- Overnight (24 hour) rest areas are limited, especially in towns, at roadside parking bays and/or near popular day use sites.
- Half and full day itineraries are lacking.
- Limited supply of premium quality niche-scale accommodation to supplement the wine / hospitality experiences on offer.
- A comparatively weak presence on social media (Facebook, Instagram, Twitter, etc).
- Blackspots in mobile communication make it difficult for visitors to use smart devices / applications reliably across the Shire.
- Limited presence on Google Maps, with very few listings of day use sites, operators, etc.

- Universal access amenities and dog-friendly destinations across the Shire are not well promoted, and not easy for visitors to locate.
- Operating hours of hospitality services are not always conducive to visitors and potentially limit the choices available to visitors;

OPPORTUNITIES & PRIORITIES:

- Creating a variety of places for RV/self-contained travellers to stay for 24-48hrs.
- Providing better quality information that encourages RV'ers to engage with local communities, clubs, events and regional suppliers to purchase local food and services.
- Encourage local tourism operators to become RV Friendly Destinations and/or rural enterprises/land owners to establish a nature-based park for short stay visitors.
- Promoting a seasonal list of the top five must-see attractions-activities, presented on a map, showing suggested routes to experience multiple sites in a half/full day.
- Encourage half/full day self-drive routes extending into the broader Geographe region by incorporating experiences in wine-hospitality, art-culture, adventure-recreation and food-produce and detailed in maps, signage and at prominent stopovers.
- Food-wine experiences packaged into self-drive trails and/or itinerary options, covering a range of visitors / budgets, encouraging visitors to stay overnight at boutique places.
- Facilitating a stronger presence on social media via links with wine-hospitality-accommodation facilities promoting events, packages, specials, happenings, etc .
- Hospitality operators rostering 'hours open' or displaying signs guiding visitors to 'open' establishments; ideally promoting local produce and locally-inspired cuisines.
- Upgrade parking capacity at the Harvey Dam amphitheatre to enable event participants to self-drive.
- Develop the walk/bike trail between the tourism precinct and Harvey Dam, adding to the appeal (purpose) of the tourism precinct (e.g. bike hire, guided walks, tours, picnics, etc).
- Develop the Regional Paths Program, enabling additional cycle/walk opportunities and increasing visitor access to a wider range of sites.
- Establish Yarloop Workshops as a 'gateway' entry statement to the Geographe region, capturing traffic diverted off Forest and South West highways.

DARDANUP TOURISM AUDIT FINDINGS

Dardanup Shire is located near the centre of the Geographe wine region, with popular tourism features including Crooked Brook Forest, Dardanup Heritage Park, Gnomesville, Ferguson Valley and eleven wineries. The Shire is emerging as a prominent wine, art-culture and nature destination. Access is primarily by sealed roads that are all-weather and serviceable year-round and public bus-coach services that pass through on a regular basis. Awareness is driven mostly by Ferguson Valley Marketing and Promotions Inc. along with a website, brochures/maps and a seasonal visitor centre. The number of sites / establishments identified in the tourism audit are shown below.

ACTIVITY	ATTRACTION	ACCESS	AWARENESS	AMENITY	ACCOMMODATION
19	46	2	10	8	10

GAPS:

- The Shire has no formal camp sites listed on the Shire or Ferguson Valley website. If not camping in the Taralea caravan park, visitors would be camping outside the Shire.
- A limited supply of premium accommodation may be preventing high yield visitors, especially groups, from staying overnight, especially in and around Ferguson Valley.
- There is a lack of maps, suggested itineraries and themed self-drive routes that encompass the broader range of sites / places within the Shire.
- Walk and bike trails are under-developed, with limited maps and details for visitors to plan and execute their visit.
- Nature-based experiences, other than Crooked Brook Forest, are under-promoted and not fully integrated into the 'tourism offering'.
- Art-culture is promoted as a feature of the Shire, listing 4 establishments, overlooking other potential sites / places that could be added to embellish the art-culture experience.
- Visitor and universal amenities are not listed or displayed on maps making it difficult for visitors to know where such facilities can be found.
- When the visitor centre is closed there is limited scope to get information.
- The Shire boasts three websites for visitors including Dardanup Shire, Ferguson Valley and Crooked Brook Forest, however, gaps remain (maps, drive routes, itineraries, bookings) and there is limited coherence across sites.
- The Shire hosts around 83 places of interest however very few are identified on a map and there is limited way-finding directions for self-drive visitors.

OPPORTUNITIES & PRIORITIES:

- Encourage the development of premium quality farmstays, B&B's and self contained chalets appealing to high yield visitors (i.e. art-culture & wine-food enthusiasts).
- Enhance existing walk and bike trails with the addition of shaded rest stops, geocache sites, lookouts, picnic sites, water points, designated pick-up/drop-off points, flora viewing sites, trail markers and interpretive-directional panels.
- Encouraging local tourism operators to become RV Friendly Destinations or rural landowners to host a nature-based park for short stay visitors.
- Nature-based experiences more actively encouraged by referencing / promoting wildflowers, bushland, birds, waterways-wetlands and vista's/lookouts as points of interest in walk / cycle trails, picnic areas, lookouts or stopovers on drive routes.
- A wider collection of art and culture establishments incorporated into a themed route or suggested itineraries.
- A more detailed listing of places on a map and/or directions for self-drive visitors, along with listings on Google Maps, so a broader range of sites can be located and visited.
- Stronger promotion of walk/bike trails, 24hr stopover areas, heritage sites, conservation initiatives and sites with natural features to showcase a wider range of options in aiming to extend the visitor season.
- Encourage half/full day self-drive routes extending into the broader Geographe region by incorporating experiences in wine-hospitality, art-culture, adventure-recreation and food-produce and detailed in maps, signage and at prominent stopovers.
- Provisions in the Town Planning Scheme to support development of tourist accommodation in the Dardanup and Eaton-Millbridge sub-regions.
- The development of Gnomesville as a formal tourist attraction with associated infrastructure (e.g. acquire adjacent land, improve the range of amenities, contain the site, enhance product / service offerings to visitors, more prominent signage, links to surrounding sites).
- Investigate the feasibility of a restaurant/café being developed at an appropriate location along the Collie River Foreshore as part of the Foreshore Redevelopment Plan.

DONNYBROOK-BALINGUP TOURISM AUDIT FINDINGS

The shire of Donnybrook-Balingup is centrally located in the broader south west and is characterised by its orchards, vineyards, forests, rolling hills and the Blackwood River valley. The Shire hosts three towns including Donnybrook, Kirup and Balingup, and has a comparatively diverse industry base including tourism, which has been gaining prominence. Access is primarily by sealed road-highway, with a network of sealed roads across the shire, and regular public bus-coach services to/from Perth and major towns of the south west. Awareness is driven mostly through two visitor centres, three websites, brochures and listings in regional holiday planners (e.g. ASW, Bunbury-Geographe). The Shire is comparatively well developed in terms of infrastructure, however, visitor amenities and way-finding (e.g. maps, guides) are not visitor-friendly. The number of sites / establishments identified in the tourism audit are shown below.

ACTIVITY	ATTRACTION	ACCESS	AWARENESS	AMENITY	ACCOMMODATION
32	51	2	12	5	44

GAPS:

- Maps on the Donnybrook Visitor Centre website are generic and do not show places of interest (e.g. attractions, amenities, accommodation, activities, etc). It would be difficult to pre-plan a visit and/or to find places using the available maps (i.e. if self-driving).
- It is unclear if any other venues (e.g. CRC, Shire Office, Petrol Station, General Store) have tourism information when the visitor centres are closed.
- Trip pre-planning and self-driving are both challenged by not having any suggested itineraries, tourism maps or self-drive routes.
- Other than transit / caravan parks, visitor options for camping and overnight (24 hour) stays are not detailed.
- Limited presence on Google Maps, Social Media websites and online tourism directories.
- It is unclear if the shire has any dog-friendly sites (e.g. camping, picnics, recreation, walking).
- Donnybrook Shire has no listing on the accesswa.com.au website and it is unclear where universal access facilities are located within the Shire, with none listed on tourism maps.

OPPORTUNITIES & PRIORITIES:

- Additional premium quality niche-scale accommodation could be encouraged to complement the wine / hospitality experiences on offer.
- Food-wine-produce experiences packaged into a self-drive trail and itinerary options.
- A stronger social media presence (Facebook, Instagram, Twitter) via partnerships with wine-hospitality-accommodation facilities promoting events, packages, specials and happenings to raise the Shire's social profile.
- Encourage half/full day self-drive routes extending into the broader Geographe region by incorporating experiences in wine-hospitality, art-culture, adventure-recreation and food-produce and detailed in maps, signage and at prominent stopovers.
- Providing information that encourages RVs to engage with local communities, clubs, regional events, local gatherings, etc and to purchase local food and services.

- Promoting a list of the Shire's top five must-see attractions and activities on a map showing suggested routes to experience multiple sites in a day.
- Preparation of a Map that guides self-drive visitors with itineraries, routes and seasonal options, including places to dine, stay, shop and explore.
- Encourage local tourism operators to become RV Friendly Destinations and/or rural enterprises to establish a nature-based park for short stay visitors.
- Develop adventure-based infrastructure and amenities along the Blackwood river to increase the range of offerings to visitors.
- Seek funding to develop 'selected' trails in the Donnybrook-Balingup Trails Master Plan, for example, in Golden Valley Tree Park, along Preston River, links to Bibbulmun and Munda Biddi trails, Racecourse Flora Reserve and Grimwade Settlement.
- Establish a regional entry statement in Balingup, for example, at the Golden Valley Tree Park with an information panel (on the region), map-brochure display and directory list.
- Develop local trails highlighted in the South West Mountain Bike Trails Master Plan.
- Redevelop the Shire's trail brochures with consistent format, branding and content or incorporate them into one broader map (e.g. 2 x A2, double-sided, folded into A4).

BOYUP BROOK TOURISM AUDIT FINDINGS

The Shire of Boyup Brook is rich in rural scenery, forests and river valley and is also the country music capital of WA, hosting the annual Boyup Brook Country Music Festival. The shire is predominantly a rural-agricultural area and tourism is generally well developed and well organised (e.g. RV Friendly, caravan park with large overflow area, choice of campsites, walk trails, signage, tourism websites, etc). Access is primarily by sealed road-highway, with a network of sealed roads across the shire. Most of the Shire's activities and attractions are within close proximity to the town site making it relatively easy for self-drive visitors. The tourism amenities are geared to supporting large events with many located in the town's central precinct. Awareness is driven through two websites, a visitor centre, a collection of maps/guides and listings in regional holiday planners (e.g. ASW, Geographe). The number of sites / establishments identified in the tourism audit are shown below.

GAPS:

- There are no formal tracks / trails for mountain bikes within the Shire. Informal bike tracks exist in surrounding forest and are used regularly by locals and enthusiasts.
- Suggested half / full day itineraries could be developed and offered via download from the Boyup Brook tourism and/or Shire websites.
- Limited accommodation for business and travel groups within the town.
- Blackspots in mobile communication.
- The Shire has one universal amenity listed on the accesswa.com.au website for disabled visitors. It's possible that other amenities exist but are not listed on the accesswa or tourism websites.
- Locations of dog-friendly destinations across the Shire (e.g. camping, picnics, recreation, walking, canoeing) are not marked.

OPPORTUNITIES & PRIORITIES:

- Promoting a seasonal list of the top five must-see attractions and activities on a brochure showing their location and a suggested route to multiple sites.

- Preparation of a map that guides self-drive visitors showing a selection of itineraries and routes to established sites in close proximity to accommodation/stopovers.
- Encourage half/full day self-drive routes extending into the broader Geographe region by incorporating experiences in wine-hospitality, art-culture, adventure-recreation and food-produce and detailed in maps, signage and at prominent stopovers.
- Encourage investment in overcoming 'blackspots' in mobile communication enabling visitors to use smart devices / applications across the Shire along with Wi-Fi at selected hot spots (e.g. in town, music park, caravan park).
- Additional accommodation (e.g. 5-10 room establishments) to supplement capacity for the annual events and/or to encourage additional visitors to stay in the shire.
- Encourage local tourism operators to become RV Friendly Destinations and/or rural enterprises to establish a nature-based park for short stay visitors.
- Increased presence on Google Maps, by listing all the popular day use sites.
- An improved layout of the Flaxmill Caravan Park to provide a range of premium 'river-front' sites and improved access to the riverbank via the caravan park (e.g. for canoeing, fishing, swimming).
- Support tourism through events, fairs, arts, produce, history and cultural experiences.
- Investigate the development of improved amenities and facilities at the music park.
- Develop and implement a street scaping / landscaping plan in the town centre.
- Investigate options to encourage owners of businesses to renovate shop frontages.
- Upgrade facilities at the caravan park, for example, new camp kitchen and BBQ area, plus shade trees in overflow area.
- Develop nature based attractions/activities such as wildflower walks and bike trails.

COLLIE TOURISM AUDIT FINDINGS

Collie is a prominent mining, power and forestry town, located 200km south of Perth, and popular for its waterways (river and dams), forest, national park, motorplex and outdoor recreation pursuits. The Shire's tourism is generally well organised and well managed with a good range of activities and attractions, mostly outdoor-oriented. The Wellington National Park is a primary attraction along with annual events including those held regularly at the Motorplex. Access is year round via sealed roads-highways and Collie is serviced almost daily by bus and coach lines. Awareness is communicated through two websites (Collie River Valley & Shire), Collie River Valley and Discovery trail maps, two holiday planners (Bunbury-Geographe and ASW), tourist radio (98.4FM), social media and the visitor centre. The number of sites / establishments identified in the tourism audit are shown below.

ACTIVITY	ATTRACTION	ACCESS	AWARENESS	AMENITY	ACCOMMODATION
49	62	2	10	58	24

GAPS:

- Some of the short stay accommodation is aged, of mixed standards, and possibly more suited to blue collar workers than holiday-leisure visitors.
- 4-5 star accommodation is limited and only one caravan park (recently re-leased).
- The Discovery self-drive routes are scenic drives. There are no themed self-drive routes focusing on mountain bikes, walk trails, heritage, nature, waterways, wine-food, etc.

- There is a lack of promotion afforded to local produce, wine and hospitality venues that might otherwise tie in with niche-scale accommodation in the Shire and surrounds.
- RVs and self-contained travellers are potentially overlooked with no dedicated facilities or amenities listed on websites, maps or planners.
- Collie is an industrial powerhouse in WA's industry landscape and yet there is limited opportunity for visitors to learn, experience or engage in the industrial activities surrounding Collie (excluding the replica mine and museum).

OPPORTUNITIES & PRIORITIES:

- Develop a range of themed itinerary options incorporating local sites, places and experiences; with varied duration, activity levels and hospitality stopovers.
- Encourage half/full day self-drive routes extending into the broader Geographe region by incorporating experiences in wine-hospitality, art-culture, adventure-recreation and food-produce and detailed in maps, signage and at prominent stopovers.
- Continue to support development of a nature based park or campground at Minninup Pool.
- Continue to support the Department of Mines and Petroleum and DPaW in obtaining funding to develop Black Diamond pool as a day use facility; especially an inland dive facility supplemented by diving amenities / facilities at Lake Kepwari and Stockton Lake.
- Encourage rural enterprises / landowners to establish a nature-based park for short stay visitors.
- Development of a Drag Strip at the Collie Motorplex and partnering with Motoring South West to continue developing and improving the viability of the Motorplex.
- Upgrade the Velodrome and through co-operative programs support road cycling events and road cycling routes / touring across the Shire and into the broader region.
- Develop a self-drive loop Bunbury to Collie via the (sealed) Munglanup-Pile road and through maps and signage encourage cycling along scenic sections from Collie to Dardanup.

CAPEL TOURISM AUDIT FINDINGS

The Shire of Capel is located 200km south of Perth and hosts around 50km of coast, beaches and seaside retreats. Capel is a producer of beef, dairy, wine, poultry, produce and mineral sands. Tourism is in a developmental stage, an emerging sector of the local economy, with each of six towns experiencing growth in tourism infrastructure. The Shire has a comparatively narrow range of activities and attractions, albeit in proximity to niche-scale accommodation making it convenient for visitors to explore the Shire. Access is primarily by sealed road and highway, with a network of sealed roads across the shire, and public coach services to/from Perth and major towns of the south west. Awareness is driven through the Shire website, listings in regional holiday planners (e.g. ASW, Geographe), an information bay in Capel and a local tourism brochure. The number of sites / establishments identified in the tourism audit are shown below.

ACTIVITY	ATTRACTION	ACCESS	AWARENESS	AMENITY	ACCOMMODATION
12	19	2	3	?	9

GAPS:

- A downloadable map of attractions, activities, amenities and suggested routes / stopovers to help visitors plan their visit and orientate across the region.

- Overnight (24 hour) rest areas near towns, at roadside parking bays and/or near day use sites to accommodate stopovers by self-contained travellers.
- Suggested half / full day itineraries across a range of themes (e.g. heritage, nature, wine, beach-aquatic, wildflowers, recreation).
- Capel's visitor and universal amenities are not listed and not easily found in public forums.
- Presence on Google Maps and listing of popular day use sites is lacking.
- Marked locations of dog-friendly destinations across the Shire (e.g. camping, picnics, recreation, walking).

OPPORTUNITIES & PRIORITIES:

- Encourage premium quality niche-scale accommodation to supplement the wine / hospitality experiences on offer, encouraging visitors to stay longer in the shire.
- Food-wine experiences packaged into a self-drive trail encouraging visitors to stay longer in the shire.
- Encourage rural enterprises to become RV Friendly Destinations or to establish a nature-based park for short stay visitors.
- Encourage half/full day self-drive routes extending into the broader Geographe region by incorporating experiences in wine-hospitality, art-culture, adventure-recreation and food-produce and detailed in maps, signage and at prominent stopovers.
- Overcome 'blackspots' in mobile communication enabling visitors to use smart devices / applications across the Shire or encourage Wi-Fi at selected sites.
- Providing better information that encourages RV'ers to engage with local communities, sport-rec clubs, regional gatherings and to purchase local food and services.
- Promote a list of the top five must-see attractions-activities on a map showing their location and a suggested route to experience multiple sites in a day.
- Develop selected trails from the Capel Trails Master Plan and specifically those linking the beach, town and Capel River (e.g. bike, walk, canoe).
- Develop Goodwood Road as a scenic tourist drive incorporating Ironstone Gully Falls, farmstays, food-produce suppliers, bush walks and mountain bike trails in State Forest and linking directly to/from Donnybrook and Capel town sites.
- Develop mountain bike trails and facilities as outlined in the South West Mountain Bike Trails Master Plan.
- Develop Capel's Civic Precinct as a stopover with an electric car charge station, a dump point and other amenities, to accommodate traffic when the outer ring road goes past Bunbury.
- Develop Fettlers Park in Boyanup as a stopover for cyclists and caravans, with a dump point, toilet facilities (with shower) and traveller amenities.
- Encourage development of a European Heritage Trail near the Ludlow settlement (Tuart Forrest) as part of the mine rehabilitation program.

4.4 VISITOR SERVICING

The region has eight visitor centres servicing approximately 190,200 visitors annually (on average) with Bunbury Visitor Centre the largest, accounting for around 55% of the visitor's serviced (avg. 105,000p.a.). The eight visitor centres are supported by approximately 235 financial members with Bunbury having the most financial members followed by Harvey and Collie. Recurring financial support from the LGAs for the eight visitor centres is estimated at approximately $445,000 annually, which equates to an average cost per visitor of approximately $2.34 (ranging from a low of $1.05 at Harvey to $3.66 at Boyup Brook). The region's smaller visitor centres (shown below in *italics*) are valued locally on a social level, however their capacity to generate economic value (and financial sustainability) is limited given their comparatively low level of visitation, narrow range of tourism product to 'sell' and business model (e.g. limited income streams, limited scope to diversify, 'shoe-string' budgets, competitive neutrality constraints, volunteer reliant, seasonal closures, etc).

VISITOR CENTRE	AVERAGE ANNUAL VISITATION	AVERAGE No. FINANCIAL MEMBERS
Bunbury	105,000	115
Harvey	31,800	70
Collie	22,100	50
Australind	13,000	*Included in Harvey*
Donnybrook	7,100	-
Boyup Brook	4,100	-
Balingup	3,700	-
Ferguson Valley	3,400	-
TOTAL	**190,200**	**235**

Trends impacting on visitor centres and visitor servicing are expected to further impose challenges on the sustainability and effectiveness of the region's eight visitor centres, including:

- Visitors are increasingly booking online before leaving home and continue to book whilst on holiday (using mobile devices), eroding bookings revenue for visitor centres.
- Group bookings remain an important source of revenue for visitor centres, but *only* where tourism operators are available to support packages, tours and co-operative marketing.
- The long term sustainability of a visitor centre is highly dependent on door traffic volumes, which is highest when a Centre is located at a popular site/attraction with high level visitation. Visitor centres at low-traffic sites are susceptible to a steadily decline over the medium term unless they can re-invent their vision/mission/modus operandi.
- Without growth in visitor service levels the revenue of visitor centres is expected to decline as bookings, merchandise sales and memberships decline. Combined with increases in wages and operating costs there will be heightened financial pressure on their sustainability.
- Alternate forms of visitor servicing such as collocation, pop-up shops, information nodes and online portals (websites, apps), can be effective provided high quality information, servicing, access and utilisation is achieved.
- Online booking systems, especially global systems, continue to proliferate allowing visitor centres (and/or sub-regional tourism organisations) to 'piggyback' onto global booking systems to access higher volumes of traffic for comparatively low fees (e.g. via subscribing to sites such as Wotif, LastMinute, Trivago, etc and listing local operators, tours, service providers etc to facilitate online bookings for the region that generate commission revenue).
- A potential sustainable business model for visitor centres is to manage and/or operate tourism-related attractions (e.g. tours, rides, hires, facilities, access/entry, etc) across multiple sites (e.g. Augusta-Margaret River & Busselton Tourism Associations); this may require a visitor centre to be independent from an LGA to avoid restrictions arising from competitive neutrality policies.

Larger accredited or financially sustainable centres are better placed to survive over the medium term provided they can adapt to changes impacting visitor servicing. Survival of smaller and/or seasonal visitor centres is threatened due to increased financial pressure, declining volunteer resources, increased use of mobile technologies and the rise of disruptive business models. The region's larger visitor centres including Bunbury, Harvey and Collie are more likely to survive provided they can build additional revenue through location advantages, commercial arrangements or enterprise activities whilst reducing costs through rostering, seasonal operation, cooperative marketing, technology, collocating and partnerships. For example, Collie's visitor centre has scope to improve its sustainability including:

- Managing the adjacent replica underground mine and selling tickets (e.g. 4,000 visitors annually, $5 entry fee, $20,000 additional gross revenue).
- Establishing an online event ticketing facility and selling tickets for ALL ticketed events in the region (e.g. 40,000 ticket sales annually, $1 per ticket handling fee, $40,000 additional gross revenue).
- Expanding the in-store merchandise range to include Harvey's Moo merchandise, Gnomesville merchandise, Collie River Valley apparel, local artisan products, etc. (e.g. 3000 visitors spend $20/each, 40% gross margin, $24,000 additional gross revenue).
- Installing a 'basic' coffee machine and selling coffees (e.g. 4000 cups / year @ $3 each, $12,000 additional gross revenue).
- Becoming a 'licensed' special tourism facility selling *locally* made wines for consumption off site (e.g. 2,000 bottles sold annually @ $1/gross margin per bottle, $2,000 additional gross revenue).
- Establishing a canoe/SUP hire venture, operating within Wellington NP under a DAW license, hiring canoes/paddles/life jackets stored on-site in the Park (e.g. 1,000 half-day hires annually @ $25, $25,000 additional gross revenue).
- Establish a 4WD park on unused Council-owned or controlled land (e.g. 2000 vehicles entering @ $40/vehicle, $80,000 additional gross revenue).
- Establish a You Tube channel and encourage residents and visitors to submit videos of adventure-nature experiences; highly popular videos with exponential 'hits' attract advertising revenue the visitor centre benefits from.

Commercial responsibility and risk could be partially absorbed via Collie River Marketing Incorporated taking a more active role and in turn employs additional staff, funds marketing campaigns and indirectly supports the visitor centre. Variations of this approach could be investigated.

Alternate approaches to visitor servicing at Balingup, Boyup Brook and Dardanup could be trialled, for example, through seasonal operation (i.e. operate from a pop-up shop, open during peak periods only), collocation (e.g. with the CRC, museum/gallery, library, sport-rec centre, shire office, post office), replaced by information nodes at selected outlets (e.g. general store, cafe, post office, service station, shire office) or via technology applications (e.g. enhanced website, local Wi-Fi, regional App, stronger digital presence). Financial savings from restructuring smaller visitor centres could be re-allocated to regional tourism initiatives. A potential approach to restructure smaller visitor centres is presented in the appendix.

4.5 BRANDING

The seven LGAs have traditionally used LGA-based approaches to branding resulting in multiple identities and no clear brand or position in the minds of visitors. In local business circles the region is referred to as Bunbury Wellington whilst in some government circles it is referred to as Geographe. The local Vigneron's Association and Australia's South West refer to *most of* the region[33] as Geographe and in tourism circles the region is *occasionally* referred to as Geographe. If regional branding is adopted, a stronger and more consistent use of Geographe may be possible or alternatively re-branding (i.e. a new name) is required *before* regional marketing can commence. The features, themes (shown below) and competitive advantages (refer to the appendix) used to promote tourism need to be captured into a regional brand. Regional workshops identified a selection of words relating to the region including rivers, valleys, dams, boutique, gateway, fresh, jewel, getaway, coast and waterways; descriptions of the region (i.e. potential slogans[34]) were also identified during the workshops including nature's gateway, adventure getaway, jewel of the south, choice valleys, valley's of adventure, nature's secret valleys, rivers of adventure and a bite of adventure. Some of the variations *currently* used for branding each Shire are outlined below.

SHIRE	FEATURES, THEMES & DESCRIPTIONS
Bunbury	Adventure, nature, excitement, culture, art, shopping, culinary delights, "Bunbury has something for everyone; Where you're free to be".
Harvey	Nature, beaches, wineries, dairy & beef & citrus, heritage; a relaxing holiday destination. "Escape for a While".
Dardanup	Agriculture, farming, beef, dairy, wine, hospitality, rivers, waterways, nature; a haven of outdoor activities. "Enjoy a Fresh Look at Country Life".
Capel	Forest, river, beaches, wineries, dairy, produce, flora and fauna; explore and discover nature.
Donnybrook-Balingup	Stunning forests, winding rivers, rolling hills, vineyards, Blackwood River Valley, lush orchards, walk trails, a central location, 'Health, Heritage and Harmony', 'Heart of the South West' and 'Magical Balingup'.
Boyup Brook	Lush farmland & bush, wildflowers, Blackwood river Valley, heritage, country music, nature, recreation; "Things for everyone"
Collie	Collie River Valley, Forest, Camping, Waterways, Adventure, Shops, Motorplex, Coalfields. "South West secret no more!"
Commonalities	***Nature, adventure, waterways, river, valley, wine-food, explore- escape***

The region is steeped in nature and adventure supplemented by food-wine, culture, heritage, event and shopping experiences. In comparison, Busselton aims to be the event capital, Margaret River aims to be the wine-food capital and Bridgetown-Manjimup-Pemberton aim to be the forest and nature capital (with food and wine overtones). Collie and Wellington National Park and to a lesser extent Bunbury, Donnybrook and Balingup are poised to become dominant mountain biking destinations, attracting adventure seekers. Wellington NP along with the dams, river valleys, forest and beaches have distinct appeal to nature seekers. The prevalence of wineries, food producers, cafes and restaurants, produce outlets and farmers markets across the Geographe region has distinct appeal to 'foodies', wine enthusiasts and those having healthy lifestyles and its closer proximity to

[33] Boyup Brook and Balingup, situated on/near the Blackwood River, fall *partially* outside the boundary of the Geographe wine and tourism region and whilst connected to the Southern Forests tourism region are also connected to the Geographe tourism region.

[34] *Experience wonder, Think Geographe!* This example of a slogan is based on Dardanup Shire's new series of Think Logo's – and lends itself to many other permutations suited to the region's tourism.

Perth than more southern destinations is a distinct advantage. The region is well placed to be a leading adventure-nature getaway in the south west supported by boutique experiences in wine, food, culture, heritage, events and shopping. Positioning as an adventure-nature getaway enables the region to highlight many of its natural features whilst appealing to a range of visitors residing in Perth and surrounding regional/rural areas.

A region's brand must showcase the opportunities for visitors to engage with the destination – its attractions, people, culture and nature – seeding a relationship between the destination and the visitor; reflecting all it has to celebrate in its culture, spirit, personality and aspirations; ideally a brand must tell a unique, authentic and compelling story about the destination. Currently, this is not the case given that towns are promoted as separate destinations whilst the term 'Geographe' is not widely used to promote the region as a destination.

Regional branding is about positioning and creating and influencing a perception of the region in the mind of visitors, to occupy a clear and unique position, relative to competitors. Core issues in defining a position include '*what is it that visitors get from visiting the region*?' (i.e. easy access, coast & valleys, a city, boutique wine & food, fresh produce, shopping, outdoor adventure); '*how are the region's experiences different from competitors*?' (i.e. city amenities, quaint rural towns, scenic rivers & valleys, uncrowded beaches); and '*what makes the region unique*?' (i.e. rivers & valleys, city, nightlife, boutique facilities). In defining how the region is positioned it is important to consider the region's main competitors and their positioning, which is outlined below[35]. Some of the region's *unique* descriptors, which could be used for positioning, are shown in bold font.

REGION	POSITIONING DESCRIPTORS
Augusta, Margaret River, Busselton	Natural playground, gourmet food & wine & beer, fresh produce, art & crafts, inspirational venues, pristine natural attractions, forest, beaches, world class events
Southern Forests	Magnificent forests, wineries & orchards, scenic & rugged coastline, national parks, gourmet & fresh produce, wildflowers, waterways & inlets, outdoor adventures, famous events & local markets, arts & crafts, tracks & trails
Peel	Nature's adventure playground, extreme & soft adventures, bush, water, beach, coastline, estuaries, escarpment, forests & national parks, food & wine & breweries, explore, play, thrill, relax
Geographe	*Something for everyone, forests &* ***rivers & valleys*** *& beach, gourmet food & wine & produce,* ***city delights & shopping & nightlife****, museums & galleries, walking & biking trails, canoeing, arts & crafts, marine life, dolphins[36], natural experiences, exciting events, dams, rural towns, an adventure playground.*

The region's competitive advantages must also be prominent in branding the region (refer to the list in the appendix). Of the competitive advantages, the most unique that differentiate the region include Bunbury City, dams, rivers, rural towns and unique facilities[37]. These and the elements outlined above should be explored if the region pursues a new name and identity. Alternatively, the

[35] Based on descriptions taken from each region's website, holiday planner and web-based marketing promotions.

[36] Dolphins are also found in Rockingham, Mandurah and Busselton/Dunsborough. They are not unique to Koombana Bay.

[37] Unique facilities such as Collie Motorplex, Bunbury Turf Club, Dolphin Discovery Centre, Gnomesville, Donnybrook Apple Orchards, Music Park Boyup Brook, Dardanup Heritage Park, Logue Brook & Harvey Dams, BREC and replica underground coal mine.

region could renew 'Geographe' as a regional tourism brand and refresh it with updated slogans and graphics based on these competitive advantages.

4.6 PACKAGING

The region is a self-drive destination. Bunbury and Busselton airports are not expected to commence regular passenger services of a sufficient scale to establish a fly-drive market during the term of this plan. Bus and train passengers are predominantly residents and friends/family such that packaging bus or train travel would be a small niche market at best. In comparison, the region's self-drive market is the largest visitor group and potential packages could be developed centring on events, activities-experiences and incentivised offers. The challenge is getting operators to collaborate in promoting and delivering packaged products and services.

The region has over 300 enterprises associated with visitors and tourism, however, it appears very few operators offer packaged accommodation, hospitality, activities, transport, entertainment, etc. There are limited examples of visitors being offered a package of services/experiences on websites, holiday planners or brochures (other than a few offered by transport/tour operators). The region has considerable potential to begin developing packages for domestic visitors and later target international visitors once a larger pool of operators are accredited, support live booking systems or have accumulated expertise in packaging. Examples of potential packages that operators could explore are outlined below:

- 1-4 day self guided walking packages within Wellington NP or the Bibbulmun Track, incorporating transfers, accommodation, food hampers & evening meals, flora & fauna guides (books), water, first aid kits, maps and trail notes.
- 2-4 day self-guided mountain bike packages centred on Mt Lennard and other regional tracks / facilities, incorporating transfers, food hampers, first aid kits, maps and trail notes, accommodation and evening meals.
- 2-3 day heritage package (self-guided or guided) centred on prominent sites such as Dardanup Heritage Park, Yarloop Workshops, Harvey Heritage Precinct, King Cottage Museum, Collie Historical Rail Precinct, Boyup Brook Pioneer Museum, etc, and incorporating accommodation, transport, meals, heritage notes and entry fees.
- 2-3 day self-guided cultural package centred around prominent sites such as BRAG, Dardanup Studios, Gnomesville, Mangrove Tour (indigenous product), Collie Art Gallery, Wardandi Memorial Park and private artisan studios, incorporating accommodation, transport, meals and entry fees (where applicable).
- 1-4 day self-guided or guided wine tours centred around the forty wineries in the region and incorporating cellar door tastings, wine specials, wine appreciation notes, accommodation, meals, maps and transport (where required).
- 1-2 day self-guided or guided tour of farms growing fresh produce and/or sites producing food (e.g. cheese, olive oil, preserves, etc), incorporating accommodation, transport, tastings, meals and guide (where required).
- 1-2 day fauna tour self-guided or guided centred around sites such as Bunbury Wildlife Park, Farm stays, bird watching sites (lakes, dams, creeks, inlets), State forest, etc, incorporating accommodation, transport, meals and guide (where required).

- 2-day guided 4WD tour centred on beach driving, state forest tracks, secluded 'challenge' tracks, creek crossings, safety induction, recovery training, etc and incorporating accommodation, meals, equipment hire, radio's and maps.
- 1-4 day adventure tour incorporating soft and hard adventure such as mountain biking, canoeing, abseiling, dolphin swim, supping, Bibbulmun hike, wildflower walk, snorkelling, fishing, 4WD'ing, quad biking, etc and incorporating accommodation, meals, transfers and transport (if required).

Higher levels of collaboration are required among operators and service providers to investigate, develop and promote packages. It would be essential for participating operators to co-promote and sell the packages to reach a broader range of potential visitors. Similarly, establishing a free-call phone number, a central email address and a central booking facility (i.e. a local coordinator) would simplify the visitor's task of enquiring and booking. Promotion via participating operators websites, a DL-sized brochure at visitor centres, advertising in the holiday planner and proposed regional maps would help reach potential visitors. Inclusive pricing and complementary offerings are recommended to enhance the perceived value of packages. Operators who are tourism accredited and/or operate a live booking facility can consider offering packages to Inbound Tour Operators and/or tour wholesalers for marketing to international visitors. If considering packages for international promotion, pricing packages for ITO's requires an allowance of 20%-30% commission payable to the ITO. Operators wanting to participate in domestic or international packages should be encouraged to join Australia's South West's capacity building program and the *proposed* Asia Tourism Development Centre.

4.7 MARKET RESEARCH

Visitor data for the Geographe region is based on Tourism Research Australia's (TRA) visitor survey program (i.e. IVS and NVS) and specifically covers Bunbury and the surrounding areas (including Waroona but excludes Boyup Brook and Donnybrook-Balingup). TRA data is reported based on ABS statistical boundaries and no longer provides consistent data on all the towns or LGAs within this study. Alternative 'local' approaches to tourism data should be adopted including:

1. A multi-faceted data gathering approach surveying visitors at selected popular sites (e.g. accommodation & hospitality outlets, art galleries/studios, visitor centres, train stations, hire car depots, cellar doors, events), traffic counters at popular day use sites and intercept surveys at popular/large events.
2. Utilise the visitor centres to gather data continuously from visitors using a standardised questionnaire (e.g. self-addressed postcard survey, 8-10 questions, input centrally quarterly, reported annually).
3. Collate monthly data on visitor centre bookings, door-counts, phone/email enquiries, merchandise sales and visitor comments.
4. Quarterly 'scan' of travel review websites and hospitality review websites collating indications of satisfaction, complaints and observations relating to the region.
5. Website hits, Facebook likes, You Tube views, etc.

The collection of 2000+ *valid* survey responses annually would provide reliable, high quality data from across the region. Over time the data will highlight trends in visitor movements, routes, activities, profiles, preferences, expenditure, length of stay and visitor servicing – to supplement generic data sourced from Tourism Research Australia.

4.8 MARKETING

Tourism marketing and promotion across the Geographe region is LGA-centric with the exception of Bunbury where a regional marketing approach is well resourced and established. In moving towards a regional approach to marketing the LGA-centric approach needs to be scaled back to remove duplication and present regional information more effectively. The existing array of marketing communication formats is outlined below.

COMMUNICATION MEDIUM	QUANTITY IN THE REGION
Tourism Websites	12
Holiday Planners	2
Tourism Brochures / Maps	30
Visitor Centres	8
Information Bays	12
Other	11

In regionalising the marketing, scope exists to redesign Bunbury's holiday planner as *the* regional pre-trip and way-finding planning tool (e.g. pre-trip information includes itinerary options, drive routes, themed experience options, budget options; way-finding information includes maps showing locations, routes and directions to popular sites with enroute stopover options such as hospitality, tours, trails, amenities).

A regional destination website should be the focal point listing ALL operators and tourism-related enterprises in a globally-linked booking system and providing a higher level of functionality for events, packages, training, way-finding, drive routes, itineraries, forums, media, etc. The various LGA-based maps and brochures should be incorporated into a series of regional drive route maps including themed maps (e.g. mountain biking, nature-adventure, wine-food and heritage-culture). An App should be developed as a way-finding tool, powered by GPS rather than mobile phone or Wi-Fi network, and providing visitors with a range of functionality (e.g. list of operators, sites, place of interest, geo-fencing to show sites/places in the vicinity, audio guides for popular sites, video's of significant experiences, etc.). Some of the eight visitor centres operate seasonally and/or by volunteers and in these instances other forms of visitor servicing could be introduced to fill gaps when centres are closed. Expenditure on targeted advertising and promotion is limited and will require contributions from operators and private enterprise given that LGAs are unlikely to have capacity to fund marketing campaigns outside the region. However, before a regional marketing approach can be developed the region needs to agree on a regional branding strategy (e.g. name, logo, slogan, style guide) as recommended in this report.

4.9 REGIONAL LINKAGES

Regional linkages will be critical in growing tourism on a regional scale. Opportunities to facilitate linkages with neighbouring regions include:

- Continued promotion of the Bunbury to Albany route via Boyup Brook, utilising maps, signage and references across print/digital/online media.
- Promoting an east-west route between Collie-Bunbury and west-bound travellers from the Goldfields and Wheatbelt (e.g. Coolgardie> Merredin> Kondinin> Narrogin> Collie> Bunbury; and Norseman> Hyden> Kondinin> Narrogin> Collie> Bunbury). Aimed at

drawing west-bound visitors from the wheatbelt and/or encouraging their east-bound departure via Bunbury and Collie.

- A 2-4 day drive loop via Perth, Bunbury, Margaret River, Albany and Perth, with diversion linkages to key sites across the Geographe region (e.g. Ferguson Valley, Gnomesville, Wellington NP, Dolphin Discovery, Tuart Forest, Apple Fun Park, etc)
- Geotourism sites[38] linking to the Great Southern, Wheatbelt and lower South West.
- Promoting a wildflower route to national parks and conservation reserves across the broader south west region (e.g. Wellington, Greater Preston, Leschenault, Yalgorup, Tuart Forest, Lane Poole, Leeuwin-Naturaliste, D'Entrecasteaux, Hilliger, Greater Beedelup, etc).
- Bunbury travel planner highlighting feeder routes into the region and showing where visitors can accommodate overnight while enroute to/from the region;
- WAITOC and successful aboriginal tourism operators (from other regions) helping develop new aboriginal tourism ventures in the Geographe region;
- Forming a list of regional airstrips suited to / accessible to recreational light aircraft where accommodation is within close proximity; a collection of airstrips forming an 'aerial trail' linking airstrips near accommodation with transfers for passengers to/from the airfields.
- Establishing a package of rail transport (i.e. The Australind), accommodation and transfers linking stopovers from Perth to Bunbury (e.g. midweek escapes, weekend getaways, event-festival packages, biking escapes, etc).
- Working with the Southern Forests Food Council in developing regional events, co-operative marketing and strategic projects (e.g. suppliers co-operative, regional branding, presence at farmers markets, etc).
- The development of trail links to the Munda Biddi and Bibbulmun trails and bike paths as outlined in the Greater Bunbury Regional Bike Plan.

4.10 VALUE OF TOURISM

At 2013, the value of tourism in the region was estimated to be in the range of $285,000,000 and $305,000,000, based on Tourism Research Australia's LGA-Profile visitor estimates and average visitor expenditures used by TRA and Tourism WA respectively[39]. Combining the Tourism Forecasting Committee's growth forecasts for 2014 to 2019 with the 2013 regional visitor estimates, the economic profile of the region's tourism sector in 2014 is outlined below (*i.e. using TWA's State averages for visitor expenditure. Refer to footnote 36 below.*).

At 2014 [40]

- The region hosted approximately 1.79M visitors, including daytrip and overnight visitors (i.e. international + domestic).
- Visitor expenditure in the region was approximately $333,000,000.
- Generating employment for approximately 2,980 FTE staff, employed within 300+ businesses *directly* involved in tourism.

[38] Geosites in Geographe include Basalt on Back Beach, Ironstone Gully, Donnybrook Stone, Collie Coalfields and White Rocks Harvey.

[39] Average daily expenditures: Daytrips TRA $123. TWA $115. ASW $105. Domestic Overnight Visitors TRA $123, TWA $126, ASW $152. International Visitors TRA $57, TWA $83, ASW $67.

[40] Employment multipliers are based on TRA national estimates taken from *Tourism's Contribution to the Australian Economy & State of the Tourism Economy 2014 & Tourism Australia's Annual Report 2013-2014;* $1,000,000 tourism expenditure supports 9FTE; $1 spent in the tourism economy becomes $1.87 in the broader economy (i.e. flow-on effect); and $1,000,000 tourism expenditure supports $500,000 expenditure on wages & salaries.

- Approximately $166,000,000 was paid in staff/owner wages & salaries, within the tourism sector.
- Tourism's flow-on effect into the broader regional economy was approximately $483,000,000.

During 2015-2019, if the region's tourism was successfully 'regionalised' with improvements in marketing, visitor servicing, product development, infrastructure, events and standards and assuming a favourable short-medium term macro-economic outlook[41] for tourism, during 2015-2019 the region could achieve average growth in visitation of 1.9% p.a. or approximately 23,000p.a. additional visitors annually. An increase of this magnitude could deliver significant economic benefit to the region, for example:

- An *additional* $24,000,000 in visitor expenditure;
- Create around 216 *additional* FTE jobs;
- Generate an *additional* $34,000,000 flow-on into the regional economy; and
- *Add* 21 new ventures to the local economy.

The value of tourism extends into the region's social environment and given improvements and growth in tourism the potential social benefits could include:

- an increase in training & skills,
- an increase in community participation, including volunteers and interest groups,
- new amenities and/or facilities into the local area,
- enhanced quality of life and an increase in civic pride,
- new outlooks and opportunities, and
- strengthened social vibrancy and economic diversification.

4.11 REGIONAL CHALLENGES.

The situation analysis and tourism audit have highlighted a range of challenges the region will need to address to achieve its potential as a 'regional' tourism destination. These are outlined below:

- The region's LGA-centric tourism has fostered distinct 'town/destinations' in the minds of visitors based on multiple brands (i.e. towns). A stronger regional identity is required in order to compete with more developed tourism regions. This requires LGAs *and* operators contributing to a co-operative program of regional branding, packages and promotion, which will require a re-allocation of tourism marketing budgets.
- The region has a limited profile in the minds of visitors. The LGAs have varying-sized tourism budgets however regional promotion is a comparatively low priority among the broader community (i.e. Councillor support will be limited). Similarly, there is no existing structure to organise operators to fund a regional budget for destination marketing (i.e. to supplement City of Bunbury's program). ASW is well placed to assist in targeting niche segments in establishing a regional profile however funding for a promotional campaign may be problematic.
- The name Geographe is well entrenched in ASW, TWA and Agency communications as a wine producing region and to a lesser extent as a tourism sub-region. The Geographe wine region has boundaries that closely follow six of the seven LGAs. A 'branding'

[41] 2015-2019. Australia & WA: Low A$, low fuel price, low interest rates, below trend GDP, above trend unemployment, below trend investment/expansion; above-trend international visitation; above-trend domestic travel incl. daytrips; below-trend outbound travel by Australians; Overall: recent headwinds limiting growth in domestic tourism are becoming tailwinds helping growth in domestic and international tourism visitation.

challenge is whether to leverage the region's wine credentials by branding the sub-region as 'Geographe' or invest in developing a new brand name (e.g. Bunbury Geographe; Geographe Rivers; Five Rivers, Wonderous Valleys, Greater Wellington, etc).

- Intra-region collaboration will be critical in organising regional approaches to daytrips, drive routes, marketing materials, events, etc. The existing tourism associations are focused largely on Shire-based objectives and purpose (i.e. as defined in their Constitutions). The LGAs are similarly constrained. A regional alliance or collaborative forum is required that ignores boundaries and focuses on regional outcomes. Very few tourism operators are accustomed to working cooperatively with fellow operators making collaboration to develop packages and itineraries a challenge.
- An online booking system linked into global booking channels along with an offline mapping App, town-based Wi-Fi and enhanced use of social media would help drive regional collaboration and grow visitation (i.e. especially among Gen X, Y & Z). Establishing and maintaining digital platforms requires resourcing and staffing beyond current levels. Tourism budgets may need to be re-allocated to areas of regional priority.
- Investment is required to provide greater choice for self-contained travellers who travel between places and stop locally overnight. Where the development of RV Friendly Towns is problematic it may be more appropriate to encourage development of RV Friendly Destinations and/or nature based parks on private land (e.g. wineries, restaurants, galleries/studios, breweries, rural enterprises, etc). Private investors and landowners need to be encouraged and supported by Shire Planning Departments.
- The region has limited tourism data to inform decision making and manage tourism. It is important that a tourism data collection system is established that over time provides a rich understanding of visitors to inform future plans and strategies. National or State tourism data should become secondary to the primary data gathered in the region.
- Tourism operators have difficulty recruiting quality staff to facilitate the growth of tourism. Intervention may be required to promote or incentivise VET enrolment in tourism-hospitality; encourage mature-age residents to consider upgrading their tourism-hospitality skills and provide work experience opportunities for youth to gain the experience and skills they require to grow the region's tourism labour pool.
- The region has an impressive range of tourism attractions and activities, supplemented by niche-scale accommodation, linked by a network of scenic roads and a growing reputation as a boutique food-wine-produce destination. The challenge is 'giving up' some of the traditional approaches and budgetary allocations to shift towards regional, collaborative approaches to tourism development. This needs to be driven from the top down, reinforced by community leaders and communicated regularly to residents and stakeholders.
- The region can differentiate itself based on unique nature-based tourism[42], outdoor adventure, self-drive routes, city and rural town experiences and boutique-scale offerings. If presented effectively these will appeal to a wide range of market segments. The challenge is establishing a regional brand, theme and identity that can be supported unreservedly by operators, stakeholders and community.

[42] For example river & valley landscapes, dams, lakes (natural and man-made) and dolphins.

SECTION 5 - APPENDIX

A. TARGET MARKET. VISITOR SEGMENTS

The region's target markets include:

DAYTRIP VISITORS

- Day trip visitors live within 0.5 to 2hrs drive; many visit popular sites/events as repeat visitors; includes sport-rec enthusiasts.
- Family Groups: single families and groups of families, socialising, sport-recreation, nature, adventure, shopping and events;
- Friends & Relatives: 18-35y.o., socialising, participating in sport-recreation, adventure-based activities, shopping and events;
- Solo Travellers: all ages, visiting friends and relatives, participating in sport & recreation, nature and shopping.

Common themes: sport-recreation, nature, adventure, shopping, events and visiting friends and relatives.

INTERNATIONAL VISITORS

- International Explorers: 25-65+ years old, self-drive 4WDs & motorhomes, mostly seeking nature, adventure, culture and heritage;
- Free independent travellers: couples, families & friends, self-drive cars and motorhomes, seek nature, culture, heritage & wine-food;
- Backpackers: 18-35y.o., some self drive, some casual workers, stay with friends & camping, seek nature, adventure & culture;

Common themes: nature, adventure and culture, self drive,

DOMESTIC OVERNIGHT VISITORS

- Grey Nomads: 60-75+ years old, couples & solo's, self drive motorhomes & car-caravans, seek nature, heritage, culture & shopping;
- Family Holidaymakers: visit annual/school holidays, stay hotel/motel/caravan parks/family-friends, seek nature, adventure & shopping;
- Extended Travellers: 30-50+ years old, couples & families, mostly interstate, self-drive, seek nature, adventure, culture, shopping & heritage;
- Weekend Warriors: all ages (families-couples-friends), often repeat visitors stay family-friends, seek sport-rec, shopping, events & adventure;
- Business & Corporate: 20-60+ years old, solo & groups, stay commercial accommodation Mon-Thur, attend events, meetings & projects;

Common themes: nature, shopping and adventure, self-drive,

Visitor segments used by Tourism Australia and Tourism Western Australia are shown below.

TOURISM AUSTRALIA & TOURISM WESTERN AUSTRALIA VISITOR SEGMENTS			
VISITOR SEGMENT	**DEMOGRAPHIC**	**PROFILE**	**MOTIVATIONS**
Dedicated Discoverers	Equivalent to 1 million consumers across Sydney, Melbourne, Brisbane and Perth. 42% have household incomes greater than $100,000 pa, 68% fall into the highest socioeconomic group based on income, education and occupation. 64% are big discretionary spenders.	A community minded and socially active group looking for something new and different. The highest socio-economic group with the highest frequency of travel. Big spenders on holidays and will pay a premium for new and authentic. Like undiscovered destinations so they can be first of their peers to visit.	Self development. Adventure. Engaged observation. Motivating Destinations: the South West, Broome, other North West and Ningaloo.
Aspirational Achievers	Equivalent to 1.3 million consumers across Sydney, Melbourne, Brisbane and Perth. 39% have household incomes greater than $100,000pa, 47% fall into the highest socioeconomic group. 56% are big discretionary spenders. 46% have travelled by air in Australia in the last 12 months. 83% like to holiday in Australia, 68% book their own travel. 41% are heavy internet users, 38% are heavy newspaper readers & 46% are heavy magazine readers.	This group have 'made it' in their chosen field. Frequent travellers but always look for a strong value proposition before making a decision. Spend big on holidays as a reward. Enjoy resorts, wine, food and activity based holidays. Look for a variety of experiences, prefer travelling to aspirational destinations.	Indulgence. Relaxation. Connection. Variety. Motivating Destinations: Margaret River & other South West, Broome, Ningaloo & Coral Bay.
Grey Explorers	Equivalent to 1.1 million consumers across Sydney, Melbourne, Brisbane and Perth. 2% have household incomes >$100,000 pa, 94% are retired, 36% fall into the lowest socioeconomic group. 12% are big spenders, 61% budget spenders. 29% recently travelled by air in Australia, 57% book their own travel. Low internet usage (9% heavy), 44% are heavy newspaper users and 34% are heavy magazine readers.	The oldest group, also known as grey nomads. Family is very important, their children have left home. Focus on relationships, experiencing what they missed out on. Have time to explore the country and reconnecting with loved ones. Travel in RVs and caravans and stay in low cost accommodation so they can travel longer. Spend time sightseeing and VFR.	Relaxation. Connection. Engaged observation. Self development. Motivating Destinations: South West, Broome & other North West, Kalbarri, Monkey Mia & Coral Coast.
Family	Equivalent of 200,000 consumers in Perth. 27% have household incomes greater than $100,000 pa, 36% are big discretionary spenders.	Conventional WA families. Devote a lot of effort into building home / lifestyle for their children. Holidays provide a chance to connect with their	Variety. Connection. Relaxation.

Connectors **(WA-based)**	35% have travelled by air in Australia in the last 12 months. 76% like to holiday in Australia, 56% book their own travel. 48% are heavy internet users and 33% heavy magazine readers. 23% are heavy commercial radio listeners.	children-partners and enjoy all WA has to offer. Self-drive & rented accommodation, development of themselves and their children are important. Travel to traditional family destinations.	Motivating Destinations: Margaret River & other South West (e.g. Busselton), Ningaloo.
Experience Seekers ***(International)***	Constitute 26-50% of potential outbound travellers from key markets. Have higher than average household income, are tertiary educated. Experienced international travellers. Seek out and enjoy authentic personal experiences; place high importance on value and critically balance benefits with costs.	Sociable and enjoy engaging with locals; enjoy a variety of experiences. Active in their pursuits, somewhat adventurous, value experiences different from their day-to-day lives. Open-minded, have an interest in world affairs, are opinion leaders within their peer and social groups. High users of technology, comfortable accessing information & messages in digital environments. Predisposed toward activities and pursuits that enhance them through understanding or learning.	Grow as an individual. Being healthy. Experience freedom. Reconnect with family. Self-discovery & education. Motivating Destinations: National landscapes such as Gt Barrier Reef, Uluru, Sydney, Margaret River , Ningaloo & Kimberley.

The City of Bunbury's approach to market segmentation and target markets is presented below.

BUNBURY TOURISM STRATEGY 2009-2014 VISITOR SEGMENTS			
SEGMENT	**DESCRIPTION**	**INFLUENCING FACTORS**	**GROWTH POTENTIAL**
Business travellers	Purpose: work or conference; average stay 1-3 nights; mostly self drive; stay in hotels/motels. Use meeting facilities, cafes & restaurants.	Local, State & Global economy; mostly resource, property and construction sectors;	Moderate
Visiting friends and relatives	Domestic and international origin. Stay 2-14 nights. Includes families with children. Prefer low cost activities and attractions, day trips to the hinterland and eating out.	Experience / activities often managed by their local hosts.	Moderate-high
Day Trip family	Live within 2 hours drive of Bunbury (i.e. Perth, Mandurah& SW region).	Seek child-focused attractions / activities; price-budget sensitive;	Moderate-high
Nature based backpackers	From overseas & interstate, travelling alone or in pairs, stay Backpacker lodge or camping, arrive by hired vehicle or public transport. Seek nature based experiences, visit Dolphin Centre, beaches, nightlife, shopping, passive and active recreation.	International/national events, airline pricing /ticket options, work visa / work options, travel group, iconic nature based attractions, enjoy socialising-nightlife.	Moderate

Perth holidaying families	Self drive, stay in budget self contained chalet / cabin or budget motel. Seek passive & active activities, shopping, attractions, cinema, entertainment & affordable dining.	Price sensitive; seek budget options, free activities, child-focused attractions; school holiday visit	Moderate
Weekend escape couples	Short break, 1 - 2 nights, originate Perth, seek quality self contained hotel or apartment, luxury & 'new' experiences, passive nature based activities, quality dining, shopping, day trip to wineries / arts / crafts / heritage.	Empty Nesters, visit year round, can be celebration / event based, self organise quality accommodation and hospitality, seek indulgence/relaxation & quality-premium experiences.	Moderate

The following visitor profiles align to the region's product mix (nature, adventure, heritage, culture, food & wine) and provide additional insight to the target market .

Source: TRA Snapshots	NATURE VISITOR	CULTURAL / HERITAGE VISITOR	FOOD & WINE VISITOR	INDIGENOUS TOURISM VISITOR
WHAT THEY DO	Visit National Parks; bushwalk; whale watch; snorkelling & scuba diving.	Visit art / craft workshops; visit historic buildings / sites; visit museums / galleries; attend festivals / events.	Visit a winery and/or tour winery regions; eat out at restaurant / café / hotel / club and/or visit local producers / outlets.	Experience aboriginal art / cultural displays; visit an aboriginal site; attend a performance.
WHO THEY ARE	20% international [UK, NZ, Japan, USA], 50% solo-travellers & 33% aged 20-29years; 80% domestic, 33% adult couples and 33% family groups;	22% international [Swiss., Ger., Ital., Dutch]; 78% domestic [adult couples, family groups], 45-64y.o,	23% international [UK, NZ, USA], 77% domestic [approx. 45% aged 35-64y.o.],	63% International [UK, USA, Japan, NZ], 35% aged 20-29years; 37% Domestic [NSW, Vic, Qsld], over half aged 35-59y.o.;
WHERE THEY STAY	International – 35% stay in rented accommodation and 24% stay with friends and relatives; Domestic – 27% stay with friends & relatives, 24% stay in hotel / motel.	International – stay in hotel / motel or with friends and relatives; Domestic – stay in hotel / motel, rented accommodation or with friends and relatives.	44% stay hotel / motel / resort, 14% caravan / camping accommodation, 13% rented house, 13% friends or relatives, 11% B&B.	International visitors stay in rented accommodation [31%], backpacker hostel [18%] or with friends & relatives [17%]. Domestic visitors stay in caravan / camping ground [45%] or hotel / motel [23%];
OTHER	Increasing 4%p.a.; represent 65% of international visitors and 18% of domestic visitors; longer length of stay on average; international visitors spend $153 / night and domestic visitors spend $165 / night; internet is the main source of information.	Represent over half of all visitors to Australia; increasing 3%p.a.; predominantly domestic visitors; Packaged tours are popular with this segment of visitors.	Represent 13% of all international visitors to Australia; internet is the main source of information. Packaged tours are popular with this segment of visitors. Other sought after experiences include relaxation, restoration, indulgence & luxury.	Participation in indigenous tourism is declining; indigenous tourism experience was not a deciding factor in visiting Australia [for 78%].

CHINESE VISITORS.

Approximately 40,350 Chinese visitors travelled to WA[43] in 2013/14, 31% more than the previous year (30,740). Growth in Chinese visitors to Australia[44] is expected to be around 11%p.a. during 2012/13 to 2017/18. The Geographe region has traditionally hosted a small number of Chinese visitors. However, they are an important growth market seeking luxury, shopping and adventure experiences. Recent developments supporting the growth in visitors from China include 3-year multiple entry visas, increased flights China-Perth, lower Aus$, burgeoning middle class in China, wider promotion of Perth-Beijing sharing the same time zone, and TWA's targeted marketing in China aiming at generating $500-million visitor expenditure by 2020. Key trends and characteristics of Chinese visitors are outlined below.

- Chinese travellers are interested in health and wellness. The health benefits of visiting the Geographe region should be outlined (e.g. clean, unpolluted air; forest walks; pristine river valleys; uncongested roads; safe-quality food; locally grown gourmet produce).
- Chinese travellers want to escape their hometowns to be in natural settings, in invigorating locations, and nature-based environs to experience untouched nature (flora, fauna, scenic landscapes). Many of these elements can be delivered via self-drive routes, suggested itineraries & tour packages.
- Chinese travellers enjoy shopping and indulging on food, souvenirs, gifts and experiences. Not all Chinese visitors are impulsive buyers, many need to gain trust before they purchase (e.g. using interpreters, Chinese language brochures & signs, samples & trials, etc).

An increasing number of Chinese visitors are entering Australia as 'Free Independent Travellers' (FITs). Many FIT's are 'adventure seekers' aged 25-35 years who self-manage their itinerary and bookings, whilst other 'adventure seekers' are 'semi-FITs' who use group bookings for select (not all) components of their trip. Most Chinese FIT's seek new experiences, soft adventure and 'freedom' to explore popular sites and attractions. Group tours remain popular among Chinese visitors especially 'Experienced Travellers' aged 40-50 years, who will use organised tours for their first and subsequent visits.

[43] TWA Fast Facts Year Ending September 2014 and September 2013.
[44] Tourism Research Australia, Summary Tourism Forecasts, Autumn 2015.

B. FUNDING SOURCES

Funding sources for the investment priorities and/or initiatives in the action plans include:

- Lotterywest Grants Program.
- Festivals Australia. Regional Festivals Project Fund.
- Tourism WA, Regional Events Scheme.
- Regional Development Australia Fund.
- Department of Regional Development, Royalties for Regions, infrastructure funds & strategic investment initiatives.
- SW Development Commission, Regional Grants Scheme and Community Chest Fund (administered for DRD).
- Heritage Council WA restoration funds.
- Tourism Demand Driver Infrastructure Program (Federal funds administered by the State Government).
- Public private partnerships and private investment.

C. SWOT ANALYSIS

STRENGTHS	WEAKNESSES
• 1.5hrs drive from Perth, close enough for daytrips & weekend escapes • Abundance of natural areas & features (coast, valley, river, forest). • Bunbury is a regional hub, a City, with significant capacity & options for visitors; ideally placed for visitors to 'spill out' into the hinterland. • Network of sealed roads and regional towns, enabling a range of scenic-themed self-drive routes between activity-experience nodes. • Year-round access by sealed roads from north, south and east; Perth-Bunbury train; Bunbury Port (cruise ships); & airport for small aircraft. • Wide range of marine-aquatic & terrestrial features, wine-food-produce and town-city events/amenities that support year-round appeal. • Variety of shops, markets, boutique outlets, studios, galleries, events and pop-up stalls spread across the region. • Strong appeal of Dolphin Discovery Centre, Wellington NP, Ferguson Valley, Gnomesville, Blackwood River Valley, Dams, Bunbury & events. • Bibbulmun Track & Munda Biddi Trail pass through the region. • Strong collection of significant and unique sites/facilities (e.g. BREC). • Region's 7 shires tourism budget (operating) of approx. $850,000p.a. • Forecast growth in resident population, driving growth in VFR segment. • 50 events in the region annually; several attract 5000-20,000 visitors.	• The region's tourism offering is inconsistent and fragmented with varied standards of service & quality, & irregular opening hours. • Limited number of quality assured/accredited tourism operators; restricting capacity to develop packages for online/wholesale promotion; • The region has no compelling reason for visitors to visit vis-a-vis competitors; the region does not feature strongly in the minds of visitors. • LGA-based tourism has focused on towns branded as stand-alone destinations, competing against each other, with localised aims. • The region has no definitive branding and identity; lacks prominence in the minds of visitors; visitors loyal to 'niches' rather than the region. • Way-finding, maps and signage are patchy making it trying for time-conscious visitors, especially first-time visitors. • Blackspots in mobile networks limit way-finding, booking & communicating. • Visitor servicing varies, some visitor centres are accredited, some open seasonally/run by volunteers; none are financially sustainable. • Visitor Centre booking systems & print promotions include only financial members, limiting the 'available' range (i.e. choice) offered to visitors. • Limited hire/rental providers and tour operators; visitors rely on DIY touring & BYO equipment (& this self-reliance limits propensity to spend in the region).
OPPORTUNITIES	**THREATS**
• 5-star resort, more self-contained 'quality' accommodation; 'sharing' under-utilised rooms / facilities promoted via global websites; increase in RV, camping & 24hr options. • Experience-themed self-drive routes & maps, itineraries & packages; helping disperse (guide) visitors across the region based on their interests-preferences. • Less restrictive & more flexible Shire Planning/Compliance to foster increased capacity to host & service more & varied visitors. • Touring maps promoting access routes via Boyup Brook-Albany & Collie-Kalgoorlie; • Stronger 'regional' presence on social media & Google maps etc; a regional tourism website; an App for trip planning & way-finding. • Capturing self-drive Chinese/Asian visitors with food-wine, shopping & nature experience • A regional approach to events, focusing on regional strengths & advantages. • Artisans, studios, galleries & public art captured in itineraries / routes & packages. • Day trip adventure–activity focus biking, canoeing, hiking, diving (e.g. Dams, NP, Rivers). • De-proclaimed Harvey, Brunswick & Wellington Dams, increased recreation use. • Growing day visits with better maps, itineraries, events & regional identity-profile. • Development & promotion of mountain bike facilities & adventure-based experiences.	• Limited free/short-stay/24hr camping, some campers may bypass the region. • Bunbury Port fees discouraging cruise ships which are unable to recoup - via commissions - the cost of a stopover ($10,000-$15,000). • LGA Planning Dept's making it 'too hard' for residents to expand facilities, invest in tourism, broaden their business, capitalise on opportunities, etc. • Perceived legal risks, liability of visitors and high cost of insurance impeding start-ups & growth of tourism-focused SME's. • Under-estimating the region's value of tourism, hindering appeal & support for the tourism sector, holding back progress & development. • Reliance on old accommodation facilities reducing the region's appeal & competitiveness; lowering the overall quality of the visitor experience. • Continued low uptake of quality assurance and tourism accreditation resulting in mixed standards & few operators qualifying to participate in packages. • 4-5 star accommodation not satisfying some Chinese/Asian high yield visitors (i.e. who are accustomed to and expect high standards). • Operators not embracing collaboration & SRTO to grow tourism & their business; operators continuing to work independently

D. COMPETITIVE ADVANTAGES

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

1. 70km of coastline including relatively uncrowded beaches, surf-coast, reef-lined shores, stretches of isolated beaches, a port, safe anchorage, coastal conservation park, coastal inlets and dunes.
2. Around 1.5hrs drive from Perth making it ideal for day trips and short stay visits including international and interstate visitors based in Perth.
3. Comparatively fresh and untouched wilderness close to Perth and enroute to popular destinations (e.g. Margaret river).
4. Five major dams, some de-proclaimed for drinking water purposes and hence accessible to visitors for camping, swimming, fishing, hiking, biking, 4WD'ing and nature appreciation (bird watching, wildflowers, fauna spotting).
5. Wellington National Park (20,000ha) and the Collie River Valley, home to pristine jarrah forest, granite outcrops, deep valleys, seasonal rapids and white water rafting, canoeing and swimming and fishing, mountain biking, hiking-walking, camping and scenic drives.
6. Regional land area of over 4600km^2 including large swathes of State forest rich with wildflowers, native flora and fauna, seven rivers, several scenic valleys, rural landholdings interspersed with quaint towns, a quality road network and a city with a population of around 31,500 residents.
7. Fourteen rural towns, large and small, hosting varying populations and services, spread across the region, within relatively close proximity, providing short-distance travelling between towns, accessible from practically all points on the compass, with quality rural scenery abound.
8. Established tourism destinations of Bunbury, Harvey, Collie and Dardanup, with capacity to host visitation year-round based on coastal attractions, forest and river valley attractions, wine and food activities, outdoor-recreation activities and a variety of events year-round.
9. Unique facilities such as Collie Motorplex, Bunbury Turf Club, Dolphin Discovery Centre, Bunbury City, Gnomesville, Donnybrook Apple orchards, Music Park Boyup Brook, Dardanup Heritage Park, Lena dive wreck, Logue Brook & Harvey Dams, underground coal mine replica and BREC.
10. Bunbury city, with a resident population of over 33,000, and the associated infrastructure, services and amenities of a 'city' that makes Bunbury the regional 'hub' for shopping, services, light industry, health-medical, education, entertainment, sport, recreation and government.
11. The Munda Biddi and Bibbulmun Tracks both pass through the region and have enormous scope to link with rural towns through short tracks.

E. RESTRUCTURING VISITOR CENTRES

Suggested approaches to restructuring small visitor centres follows:

1. Explore collocation, a seasonal pop-up shop, information nodes and technology options as alternate forms of visitor servicing and/or to improve financial sustainability.
2. Collocation can include paying nominal fees for floor space, overheads or a contribution to staff costs (usually well below the cost of a stand-alone building with staff, utilities, etc).
3. Visitor servicing within a pop up shop can co-exist with a co-operative community-based shop selling local products (on consignment) and benefit from vested residents operating the shop. Pop-up shops are typically open during peak periods only.
4. For information nodes, identify willing operators such as cafe / CRC / service station / general store / post office and prepare a small brochure rack to install in each outlet. Prepare and supply a small sandwich-board sign displaying 'visitor information' to locate outside each outlet when open. The brochure rack is to be placed in a highly visible location.
5. Technology applications can include an upgrade of the Shire's tourism webpage to provide downloads of tourism maps / brochures / service directory, etc, links to social media sites populated with local content (Facebook, Twitter, YouTube, Instagram), and listings on Google Maps of popular sites-attractions and local tourism operators (to aid way finding).
6. Explore scope for local tourism volunteers to attend the pop up shop or outlets during peak periods to assist staff / operators with visitor servicing and to provide information to visitors.

F. SAMPLE MOU

Memorandum of Understanding

Between
City of Bunbury
Shire of Dardanup
Shire of Collie
Shire of Harvey
Shire of Donnybrook-Balingup
Shire of Capel
and
Shire of Boyup Brook

This Memorandum of Understanding (MOU) sets out the terms and understanding between the Municipalities of the Geographe region to develop and grow tourism in a regional and collaborative manner during 2015 and 2019.

Background
The Geographe region is host to a significant 'stock' of tourism infrastructure and around 1.8 million visitors annually. Tourism has been developing in the region for decades, however, the potential value of tourism as a valued economic driver has only recently been acknowledged. The seven municipalities in the region have traditionally operated 'shire-centric' approaches to tourism, often competing with neighbouring LGAs, and subsequently tourism has evolved with a focus on local

towns as destinations. To grow tourism visitation, stay and expenditure across the region it is necessary to address the gaps and opportunities in a collaborative and regional manner. This MOU sets out a framework that will help the seven municipalities of the Geographe region to unite and grow tourism in implementing the Regional Tourism Development Strategy 2015-2019.

Purpose

This MOU will be integral in guiding the municipalities of the Geographe region towards achieving a regional vision for tourism, being:

> *The Geographe region is a leading adventure-nature destination with high quality boutique offerings in wine-food, culture and heritage experiences; with a network of quaint rural towns, unique facilities, diverse accommodation options, scenic drive routes and a regional city; where tourism generates over 2.4M visitors and $460M expenditure annually, and is an important driver of economic and social progress across the region.*

A primary objective of this MOU is to establish a framework that will help:

> *Establish the Geographe Region as a leading self-drive daytrip and overnight destination by 2020; attracting an <u>additional</u> 30,000 visitors annually and spending an <u>extra</u> $6.1M p.a. in the region by 2020;*

The vision and objective will be achieved by resourcing and supporting the Regional Tourism Development Strategy 2015-2019, which aims to:

> *Raise the profile and appeal of the Geographe region through regional branding, co-operative marketing material, targeted advertising-promotion (undertaken by Australia's South West), improved way-finding and self-drive routes, coordinated event calendar, improved service standards, enhanced visitor servicing and investment in tourism infrastructure.*

This MOU adopts a timeframe extending from December 2015 to December 2019. This MOU is to be resourced and supported for four years to implement initiatives outlined in the Regional Tourism Development Strategy 2015-2019 (dated July 2015). The Municipalities of the Geographe sub region will collaborate and cooperate in respect to the following:

- Tourism staff from the Municipalities co-operating within the spirit of this MOU and working collaboratively on creating regional maps, planner, website, app and implementation of the Regional Tourism Development Strategy 2015-2019;
- Regional branding using a name (yet to be decided) but adopted across multiple formats as outlined in a branding style guide;
- Creation of three major self-drive routes (with maps and signage) and five experience-themed maps highlighting places of interest across the region;
- Appointing Australia's South West as the sub-region's tourism advertising-promotion facilitator, supported by an agreed nominal budget and annual communication program with KPI's; and co-funded by tourism operators from across the region.
- Collective input to a branded regional tourism website and holiday planner;
- Establishing multiple outlets in each town distributing tourism information (i.e. nodes);
- Endorsement and implementation of the aims-objectives-actions within the Regional Tourism Development Strategy 2015-2019;

- Encourage the establishment of a sub regional tourism organisation made up of tourism operators and community 'champions' to assist in implementing, guiding and monitoring selected aims of the Regional Tourism Development Strategy; and

- Endeavouring to provide a base-level of annual support for the *regional* tourism initiatives set out within this MOU and the Regional Tourism Development Strategy 2015-2019, including support in the forms of financial, staffing, in-kind, facilities, equipment, knowledge and expertise.

Any *additional* regional tourism development activities and initiatives agreed to by the Municipalities of the Geographe region are to be resourced and supported in accordance with this MOU, and details appended to this MOU upon being agreed by the Municipalities.

Reporting
The Municipalities of the Geographe region shall collectively evaluate the effectiveness of and adherence to this MOU and shall do so at twelve month intervals for the duration of the MOU. Twice-yearly meetings will be scheduled and effected to monitor progress, allocate resources, identify priorities and review this MOU. The host Municipality will provide secretarial support for periodic meetings and will distribute meeting minutes promptly thereafter.

Funding
This MOU is a binding agreement and a commitment of support and resourcing by the Municipalities of the Geographe region. Each respective Municipality shall adequately and appropriately support and resource the activities and initiatives outlined in this MOU, as outlined hereunder, to the extent agreed by the Municipalities of the Geographe region for the purpose of implementing the Regional Tourism Development Strategy 2015-2019.

Municipality	**Role & Contribution (*examples shown*)**
City of Bunbury	$XYZ, app, staff, in-kind
Shire of Dardanup	$XYZ, website, IP, facilities
Shire of Capel	$XYZ, marketing materials,
Shire of Collie	$XYZ, regional brand,
Shire of Harvey	$XYZ, signage,
Shire of Boyup Brook	$XYZ, drive routes,
Shire of Donnybrook-Balingup	$XYZ itineraries,

Duration
This MOU is at-will and may be modified by mutual consent of the authorised signatories. This MOU shall become effective upon endorsement by the authorised signatories and will remain in effect until modified by mutual consent by the authorised signatories. In the absence of mutual agreement by *all* the LGAs the remaining participating LGAs will endeavour to support this MOU until its termination on 31st December 2019 or until such time as mutually agreed by the participating LGAs.

Arbitration
Unresolved disputes arising from this MOU shall in the first instance be settled by mediation facilitated by a local CCI chairperson or executive. If unsuccessful, a mediation panel comprised of three or more distinguished members from local CCI, Rotary, Apex and Lions shall be convened to identify the best available compromise in resolving the dispute.

Contact Information

City of Bunbury, CEO	Phone: 9792 7000	Email: ceo@bunbury.wa.gov.au
Shire of Dardanup, CEO	Phone: 9724 0000	Email: mark@dardanup.wa.gov.au
Shire of Collie, CEO	Phone: 9734 9000	Email: david.blurton@collie.wa.gov.au
Shire of Harvey, CEO	Phone: 9729 0300	Email: michael@harvey.wa.gov.au
Shire of Boyup Brook, CEO	Phone: 9765 1200	Email: ceo@boyupbrook.wa.gov.au
Shire of Capel, CEO	Phone: 9727 0222	Email: psheedy@capel.wa.gov.au
Shire of Donnybrook-Balingup, CEO	Phone: 9780 4200	Email: jattwood@donnybrook.wa.gov.au

Authorised Signatories

__________________________Date: ....
(CEO, City of Bunbury)

__________________________Date:................................
(CEO, Shire of Dardanup)

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(CEO, Shire of Collie)

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(CEO, Shire of Harvey)

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(CEO, Shire of Boyup Brook)

__________________________Date:...............................
(CEO, Shire of Capel)

__________________________Date:..............................
(CEO, Shire of Donnybrook-Balingup)

G. APP. SCOPE & QUOTE

Aim: to provide an app that will help visitors tour the region and locate places of interest.

The App will work 'offline' (i.e. via GPS) without connection to mobile phone networks or Wi-Fi. A collection of tours, along themed self-drive routes, will provide a framework for visitors to select an activity or experience of interest and be guided along that route to the places of interest or the available stopovers. The maps can include text, images, video and audio to help visitors way-find around the region. The App supports a wide range of languages.

The content for each stopover or place of interest can include text about the location, one or more images of the location, audio and/or video clips for each location and any site-specific information (e.g. instructions, direction, warnings). The LGAs will be required to provide details for each point of interest including accurate geo-referenced information for each point of interest (i.e. so sites appear correctly on the maps and directions/distances to places of interest are true and correct). Additional information can also be built-in to the App such as flora/fauna guide, business directory, event calendar, suggested itineraries or recommended cafe-restaurant-accommodation nearby.

The App will have a content management system enabling specified operators (e.g. from the LGAs or SRTO) to update the inventory of places and routes using a web browser accessed from the MyTours website (i.e. via log-in, password protected). The content will be editable and update-able including non-tour features such as petrol stations, general stores, local businesses, rest areas etc and searchable by theme, area or name. The App will have geo-fencing where points of interest will be automatically activated and highlighted as the visitor nears a location.

The App, suitable for Android and iOS devices, would be downloadable through Apple and Google Play App stores, for a nominal fee (i.e. for cost recovery purposes). Advertising could be incorporated into the App to offset annual costs (e.g. cafes, restaurants, accommodation, etc).

The App supplier, MyTours (NZ), supplies a branded functioning App with after sales support and advice, which becomes the property of the LGAs. Proceeds from sales of the App go to the LGAs.

A yearly subscription fee to MyTour ensures the App remains up to date with the latest features and operating system requirements. MyTours have developed over 100 Apps including for some of Australia's largest tourism sites (e.g. Powerhouse Museum, National Gallery, Victoria Museum).

Indicative Costs:

Standard Setup:	$2,000
Back-end Permissions:	$5,000 (i.e. so the LGAs can edit & manage content).
Geo-Fencing Activation:	$5,000 (i.e. sites 'appear' automatically when in the vicinity).
Collections:	$3,000 (i.e. installing events calendar, business directory, etc).
Yearly Subscription:	$3,000 (i.e. for MyTours to keep the App updated, compliant, etc).
Indicative Cost + 1-Yr Subs.:	**$18,000**

Cost Recovery:

The region hosts *approximately* 1.4M day trip visitors and 400,000 overnight visitors, total 1.8Mp.a. If 1% of visitors (18,000) downloaded the App for $1.00, the initial cost could be recovered in year 1. Years 2 onward, if 0.5% of visitors (9,000) downloaded the App for $1 the subscriptions and cost of any improvements or upgrades would be recoverable.

H. SUPPLEMENTARY DEVELOPMENT PRIORITIES

A selection of 'strategic' development priorities were ranked highest to lowest in terms of the vision, differentiation, competitiveness and achievability as outlined below (H-high, M-medium, L-low). The development priorities have potential to improve the effectiveness of the region's tourism strategies, with anticipated benefits flowing across the region. They are provided as a comparison with other priorities listed in the main body of the Strategy.

TOURISM DEVELOPMENT PRIORITY	SUPPORTS VISION & STRATEGY	HELPS DIFFERENTIATE THE REGION	IMPROVES THE REGION'S APPEAL & COMPETITIVENESS	ACHIEVABILITY & BENEFIT
Inland diving at Lake Kepwari, Stockton Lake and Black Diamond Pool.	H	H	H	H
Upgrade Wellington NP campgrounds, extended walk track and scenic drive.	H	H	H	H
Formalise Gnomesville as a tourist attraction.	H	H	H	H
'All Things Wheels' event Summernats-style at Collie.	H	H	H	M
Innovative lighting of building exteriors across Bunbury.	H	H	H	M
Bunbury to Collie scenic drive loop via Mungalup-Pile Road	H	M	M	H
Ring road and themed drive routes around the region.	H	M	M	H
Food-wine event along the Indulgence Trail from Harvey to Boyup Brook.	H	M	M	M
Mountain bike trails in Harvey, Donnybrook and Balingup.	H	M	M	M
Day use sites and access points along the Blackwood River.	H	M	M	M
Jetty facility at Bunbury for cruise ship tenders.	H	L	H	M
Boyup Brook's Country Music and Arts Centre for Excellence.	M	H	M	M
Collocate the Bunbury Visitor Centre with the Dolphin Centre.	M	M	M	M
Nature based Park or campground at Minninup Pool	H	L	L	M
Develop Goodwood Road as a scenic tourist drive.	H	L	L	M
Walk-Bike trail from Harvey Tourism Precinct to Harvey Dam via the suspended bridge.	M	L	M	M
Overcome mobile black spots & install Wi-Fi in towns.	M	L	L	M
H – High, M – Medium, L – Low		In Rank Order From Highest To Lowest		

The supplementary tourism development priorities (listed above) require formal assessment (e.g. feasibility, business case, cost-benefit, etc) and are detailed briefly below in rank order.

1. Develop facilities at Black Diamond Pool, Stockton Lake and Lake Kepwari as inland dive sites with swim-throughs, platforms, dive trail and hires (e.g. tanks, refills, SUP's, canoes, etc), along with day use amenities. Rationale: Outdoor-adventure.
2. Upgrade Wellington National Park including walk-in / canoe-in camping opportunities; a scenic drive loop incorporating Pile rd, River Road, Falcon Rd, Wellington Forest Rd and King Tree Rd. Rationale: Outdoor-adventure and self-drive.
3. Formalise and develop Gnomesville as a tourist attraction, establishing a fence/boundary around the site (to stop further expansion), and complement with toilets, picnic facility, pop-up shop, signed areas and pathways, parking, and approach signage. Rationale: Uniqueness.
4. Develop a 'Summernats' style event that incorporates 'All Things with Wheels' at Collie, incorporating rural-country lifestyle themes into a (long) weekend event[45]. Rationale: Events and self-drive.
5. Install innovative lighting at various locations around Bunbury, lighting up the outside of local buildings, giving impetus to nightlife, events and activities. Rationale: Events.
6. Develop a scenic drive loop linking Bunbury and Collie via Pile Road, Mungalup Road, Coalfields Road and South Western Highway; highlighting access to key sites such as Ferguson Valley, Gnomesville, Wellington Reservoir, etc. Rationale: Self drive
7. Develop a 'ring' road drive-route around the entire region taking visitors to popular sites, wineries-eateries, nature and culture-art sites, linking in to smaller themed drive routes. Rationale: Self-drive.
8. Develop a food-wine event that incorporates venues along the proposed 'Indulgence Trail' (Harvey to Boyup Brook), linking accommodation and hospitality providers. Rationale: Self drive and Events.
9. Develop mountain bike trails at Harvey, Donnybrook and Balingup as outlined in the SW Mountain Bike Trails Master Plan[46] (2014); enabling a choice of trails and facilities in the northern and southern areas of the region, including capacity to host events. Rationale: Adventure and events
10. Develop additional day use sites and access points along the Blackwood River, including overnight rest areas and camping sites, to facilitate recreational activities and linkages to trails, operators and points of interest. Rationale: Recreation & adventure.
11. Develop a wharf (jetty) facility for cruise ship tenders to embark/disembark passengers; enabling cruise ships to anchor off shore from Bunbury and ferry passengers into Bunbury's outer harbour. Rationale: Cruise market and day trip packages.
12. Develop Boyup Brook's Country Music and Arts Centre for Excellence, a venue enabling year-round events and hospitality, with facilities that attract musicians, artists and general public year-round. Rationale: Events, culture, arts and accommodation.
13. Collocate the Bunbury Visitor Centre with the Dolphin Centre, to benefit from higher visitation at the Dolphin Centre and its iconic appeal; outsource operation of the

[45] Could include for example a billy cart road race, skateboard road race, cycling road race, vintage car rally, restored car exhibition, ute displays, racing at Motorplex, mountain bike trials, 4WD trail challenge, novelty billy cart race, car rally event, dirt bike race, etc.

[46] The SW Mountain Bike Master Plan recommends additional mountain bike trails in Harvey, Donnybrook and Balingup as moderate priorities for development over the medium term. This strategy recommends fast-tracking development of the trails.

Visitor Centre to the Dolphin Centre; enabling amalgamation of visitor servicing, merchandising, bookings, hospitality/cafe and pick-up/drop-off point for tours and transfers. Rationale: improved sustainability of the Visitor and Dolphin Centres.

14. Develop a nature based park or campground at Minninup Pool, adding greater choice for campers / travellers in the Collie region, including RV & self-contained travellers. Rationale: Nature-based accommodation.
15. Develop Goodwood Road as a scenic tourist drive linking Donnybrook and Capel, incorporating Ironstone Gully Falls, farmstays, food-produce suppliers, bush walks / mountain bike trails and nature appreciation sites in State Forest. Rationale: Self Drive.
16. Develop a walk trail from the Harvey tourism precinct to Harvey Dam including a suspension bridge; and create additional parking at Harvey Dam Amphitheatre, enabling event patrons to self-drive; Rationale: Events & Outdoor-adventure.
17. Fast-track development of mountain bike trails in Harvey, Donnybrook and Balingup to complement bike trails in Collie / Wellington NP, dispersing visitors across the region. Rationale: Events & Outdoor-adventure.

I. REGIONAL TOURISM DEVELOPMENT & PLANNING WORKSHOP

A regional workshop was held in February 2014 to scope out approaches to a regional tourism development strategy. The workshop identified short and long term planning priorities as outlined below, which are addressed in the action plan.

<table>
<tr><th>Key Strategy Outcomes – Short Term</th><th>Key Outcomes – Long Term</th></tr>
<tr><td>
As per Tourism Futures South West

Events
Development
Coordination
Marketing
Packaging
Events
Transport/tours (including the Busselton Regional Airport and rail)
Accommodation/attractions/restaurants
Public Infrastructure
Mobile phone towers
Free Wi-Fi
Available water/power
Dump points
Signs/entry statements
Roads and access including disability
Quality Product development
Training and Service delivery
Regional Tourism Management
Single point of tourism contact for the region
Partnerships/cooperative relationships
Visitors Centre networks
Alliances
Marketing/Packaging
Co-operative marketing
Self drive trails
Digital/online
Australia's South West
Regional map

</td><td>

Local government
Town planning scheme
Tourism policies
Standardisation of regulations instead of LG interpretation
Regional branding
Delivery of visitor information
Technology (All VCs to use the same tools)
TripAdvisor
Facebook
Industry understanding of how different tourism markets operate
Operators need to support VC and establish 2-way relationship
Develop ambassador programs
Training
Signage
Operators need to work together
Digital technologies
Possible VC on highway
VC collocation to be more sustainable
Supporting Infrastructure
Attractions development (private sector)
Accommodation (private sector)
Sporting facility upgrades

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