



AUSTRALIA'S GOLDEN OUTBACK
TOURISM DESTINATION
MANAGEMENT PLAN



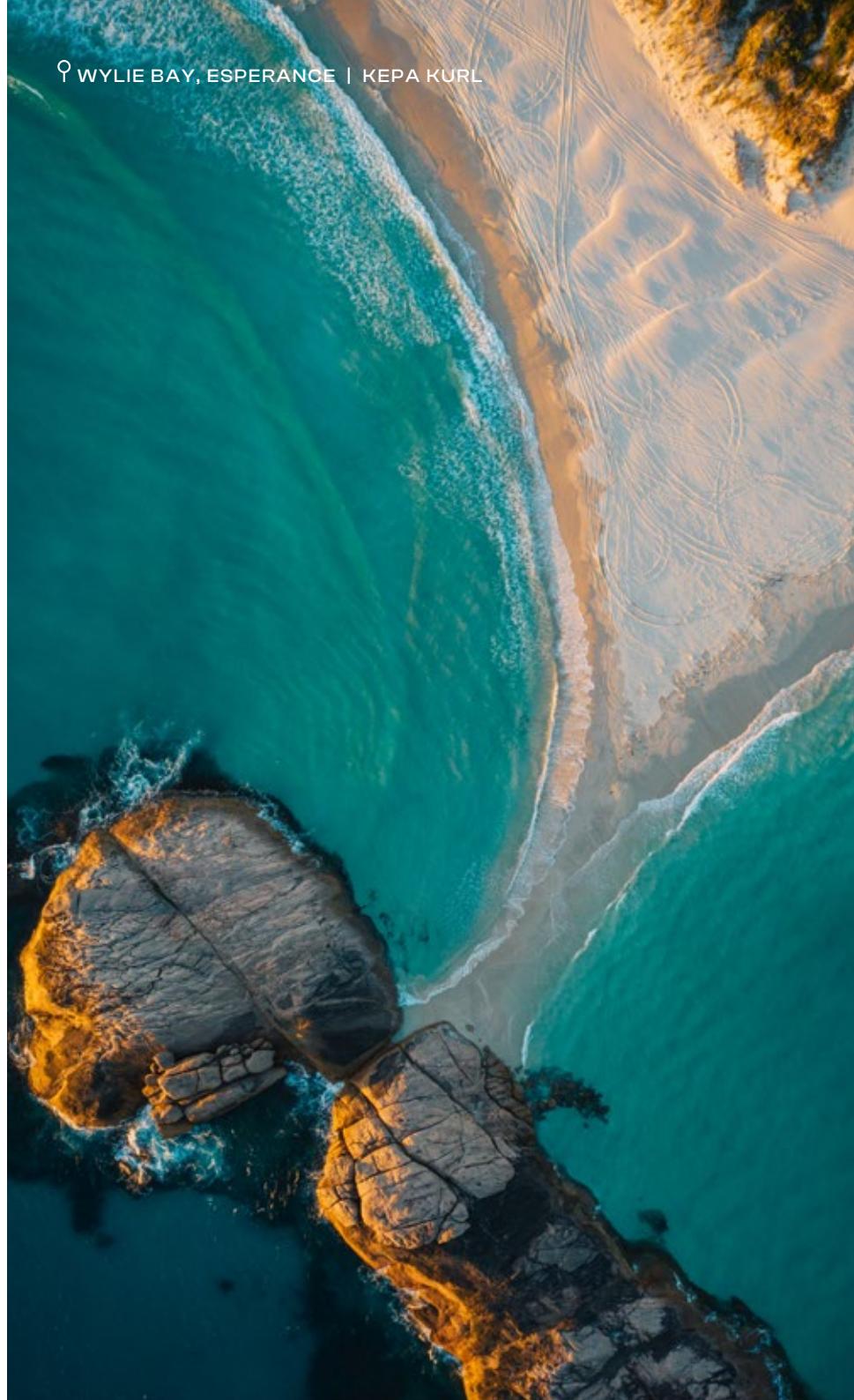


ACKNOWLEDGEMENT OF COUNTRY

We acknowledge Aboriginal people as the traditional custodians of Western Australia and pay our respects to Elders past and present. We celebrate the diversity of Aboriginal West Australians and honour their continuing connection to Country, culture and community. We recognise and appreciate the invaluable contributions made by First Nations peoples across many generations in shaping Western Australia as a premier destination.

LIST OF ACRONYMS

ACRONYM	DESCRIPTION
ACs	Aboriginal Corporations
AGO	Australia's Golden Outback
ASW	Australia's South West
ATEC	Australian Tourism Export Council
CoKB	City of Kalgoorlie-Boulder
DBCA	Department of Biodiversity, Conservation and Attractions
DLGSC	Department of Local Government, Sport and Cultural Industries
DoT	Department of Transport
DPIRD	Department of Primary Industries and Regional Development
DPLH	Department of Planning, Lands and Heritage
DTWD	Department of Training and Workforce Development
GDC	Gascoyne Development Commission
GEDC	Goldfields-Esperance Development Commission
LGA	Local Government Authority
LTO	Local Tourism Organisation
MRWA	Main Roads WA
MWDC	Mid West Development Commission
NEWTRAVEL	Collective of nine communities of the northern Wheatbelt
RDA	Regional Development Australia
RDCs	Regional Development Commissions
ROCs	Regional Organisation of Councils
OHDC	Outback Highway Development Council
SoE	Shire of Esperance
SoK	Shire of Kondinin
TCWA	Tourism Council WA
TO	Traditional Owners
TWA	Tourism WA
WAITOC	Western Australian Indigenous Tourism Operators Council
WDC	Wheatbelt Development Commission
WAPC	Western Australian Planning Commission
WYAC	Wajarri Yamatji Aboriginal Corporation

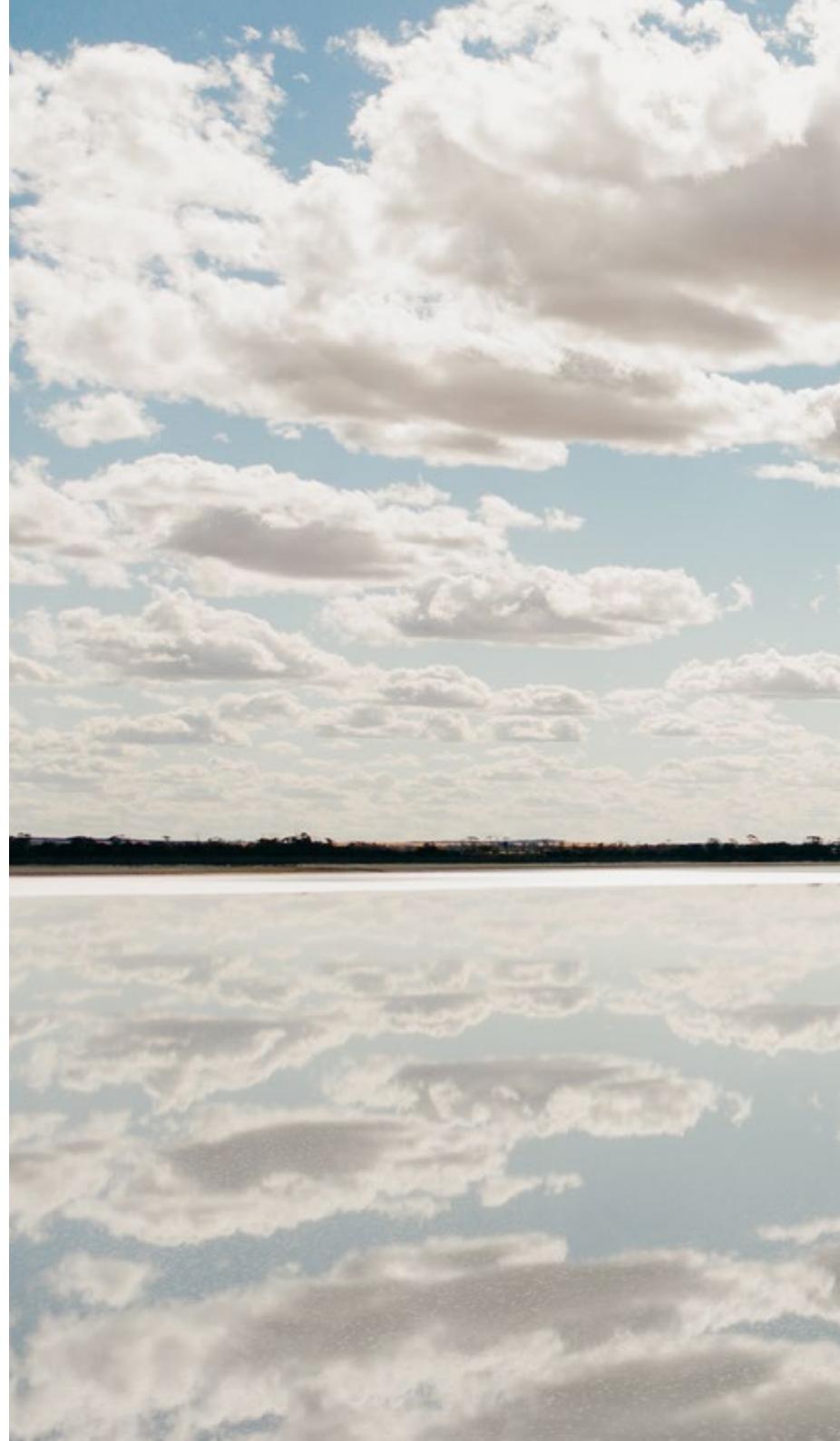


KEY AGENCIES & THEIR ROLES

AGENCY	ROLES
Tourism WA	Tourism Western Australia (Tourism WA) is the State Tourism Organisation (STO) with a goal to grow tourism by marketing Western Australia as an incredible holiday and business events destination; attracting and promoting world-class sporting, cultural and arts events; and improving access, accommodation and tourism experiences.
RTO	Regional Tourism Organisations (RTOs) build strong relationships with Local Tourism Organisations (LTOs) and Local Governments to achieve better tourism outcomes and make the most of marketing activities. RTOs provide marketing opportunities to tourism businesses to encourage direct bookings; keep the industry informed, provide trade coaching and representation and facilitate industry development opportunities.
LGA	Local Government Authorities (LGAs) have an economic development function and often work closely with RTOs and LTOs to develop regional tourism. LGAs also directly manage or are closely involved with key tourism assets — such as visitor centres, caravan parks and reserves.
RDC	Western Australia has nine Regional Development Commissions (RDCs) whose role is to encourage, promote, facilitate and monitor development in their respective regions. RDCs also work collaboratively across all levels of government, multiple industries and not-for-profit agencies to develop and deliver regional programs, policies and services.
TCWA	Tourism Council Western Australia (TCWA) is the peak body representing tourism businesses, industries and regions in Western Australia. The Council promotes the value of tourism, facilitates sustainable tourism development and advocates industry policy on behalf of members.
DBCA	The Department of Biodiversity, Conservation and Attractions (DBCA) manages Western Australia's parks, forests and reserves to: conserve wildlife; provide sustainable recreation and tourism opportunities; protect communities and assets from bushfire; and achieve other land and forest and wildlife management objectives. DBCA conserves Western Australia's biodiversity, cultural and natural values in partnership with Traditional Owners (TOs).
MRWA	Main Roads WA (MRWA) are responsible for the state's road network. They work to ensure the roads meet the needs of the community, industry and stakeholders. They provide safe, reliable roads, bridges and paths throughout the state to improve accessibility.
DoT	The Department of Transport (DoT) provides and enables safe, accessible and efficient movement for Western Australia's economic and social prosperity. DoT aims to provide the state with the best integrated and intelligent transport services and solutions.
WAITOC	Western Australian Indigenous Tourism Operators Council (WAITOC) is the peak representative for Aboriginal tours and experiences in Western Australia, promoting and supporting authentic cultural experiences at a state, national and international level.
WA Ports Authorities	Western Australia has five port authorities which facilitate trade within and through the port, are responsible for the safe and efficient operation of the port and for planning for future growth and development of port activities.
LTO	Local Tourism Organisations (LTOs) are responsible for promoting their local area and its members, and driving or participating in local tourism development initiatives.
Visitor Centre	Visitor Centres (VCs) give destinations an opportunity, once visitors are at the destination, to provide information, recommendations and trip planning functions.

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INTRODUCTION

The Australia's Golden Outback (AGO) Tourism Destination Management Plan (TDMP) establishes a vision for the region, supported by goals and priorities designed to drive tourism at all levels. The key priorities reflect product development trends and stakeholder insights, and are supported by abridged Regional Tourism Development Strategies (RTDS) to address supply, demand and capability gaps, ensuring a holistic approach to tourism across the region for the next 10 years.

The documents have been informed by an analysis of the region's visitor economy, attractions and experiences, brands and destination marketing. Comprehensive stakeholder engagement was conducted to understand the opportunities and priority projects for tourism expansion. The projects are assessed at a regional and subregional level to ensure initiatives will have the most impact on sustainably growing the region's visitor economy.

Both the TDMP and RTDS documents address gaps in the following areas:

- Supply** including attractions, events, access and connectivity and infrastructure.
- Demand** including the region's positioning, markets and destination marketing.
- Capability** including workforce and skills development, funding and partnerships.

AGO TDMP outputs:

- The TDMP, an overarching 10-year plan for the AGO tourism region (this document).
- Four abridged RTDS establishing tourism projects and actions within the Mid West, Goldfields-Esperance, Wheatbelt, and Gascoyne Development Commission regions.

It is important to note that many of the priorities identified in the documents are aspirational and unfunded. Their inclusion will provide industry and government with the strategic direction to seek resourcing, if required, to deliver initiatives within their areas of responsibility.

PLAN ON A PAGE

VISION

The AGO region is a truly unique destination where visitors can traverse remarkable open landscapes, engage with connected communities and witness unrivalled natural beauty.

GUIDING PRINCIPLES

EXPANSION

DIVERSIFICATION

CONNECTIVITY

AUTHENTICITY

10-YEAR GOALS

Grow capacity and infrastructure in aviation, self-drive and cruise.	Grow and diversify accommodation offerings in the region.	Refresh existing and develop new, unique experiences.	Create and utilise unique events to promote visitor dispersal.	Build upon the AGO brand assets.	Improve capacity and capability of the tourism sector.	Develop, grow and showcase Aboriginal tourism.
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INITIATIVES

<ul style="list-style-type: none"> In conjunction with Traditional Owners, develop the Outback Way into a leisure drive route. Expand drive tourism routes throughout the region. Establish regular passenger transport services from the east coast of Australia to Kalgoorlie-Boulder and Esperance. Advocate for infrastructure upgrades to support the cruise sector. 	<ul style="list-style-type: none"> Encourage investment in new developments that meet the needs of priority markets. Enhance the station stay experience, leveraging unique points of difference. Seek the development of accommodation to support visitation to national parks and reserves. 	<ul style="list-style-type: none"> Enhance the visitor facilities and infrastructure at key attractions to support visitation. Expand the range of bookable products including dark sky tourism, trail development and AGO's big rocks. Increase the portfolio of unique experiences to leverage cruise visitation in Esperance. 	<ul style="list-style-type: none"> Develop a portfolio of events to encourage inter-regional and intrastate travel. Support the development of at least one major event with a focus on growing shoulder season visitation. 	<ul style="list-style-type: none"> Establish AGO as the premium destination for road-tripping in Western Australia. Establish subregional differentiation through storytelling and promotion of signature assets. Continue to develop the Esperance experience and brand proposition. 	<ul style="list-style-type: none"> Increase the pool of tourism and hospitality workers. Provide training and mentoring opportunities for operators to improve visitor experience, develop new products, and retain and upskill workers. 	<ul style="list-style-type: none"> Integrate Aboriginal culture into existing offerings and develop unique hero experiences championed by Traditional Owners. Implement priority actions from the Jina Plan. Establish an Aboriginal experience at Walga Rock in collaboration with Wajarri Yamaji Aboriginal Corporation.
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PRODUCT DEVELOPMENT FOCUS

DARK SKY

ROAD TRIPS & ACCOMMODATION

NATURE & BIODIVERSITY

ABORIGINAL TOURISM

CULTURE & HERITAGE

The background image is an aerial photograph of a coastal area. It features a sandy beach in the foreground, followed by a line of green vegetation and a series of white, sandy dunes. The ocean is visible on the left, with turquoise-colored waves crashing onto the shore. The overall scene is bright and natural.

PART 1: TDMP VISION, GOALS & PRIORITIES

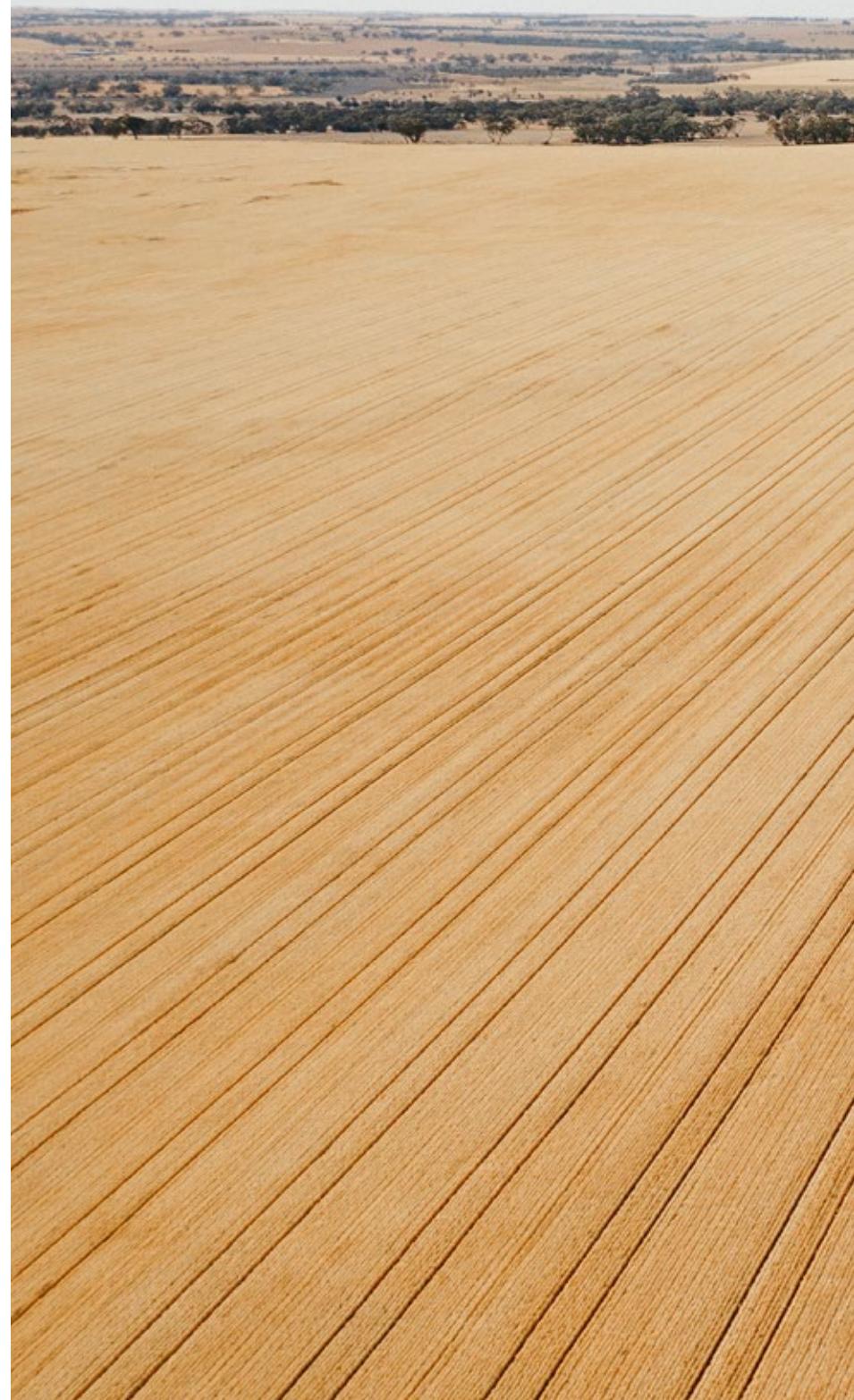
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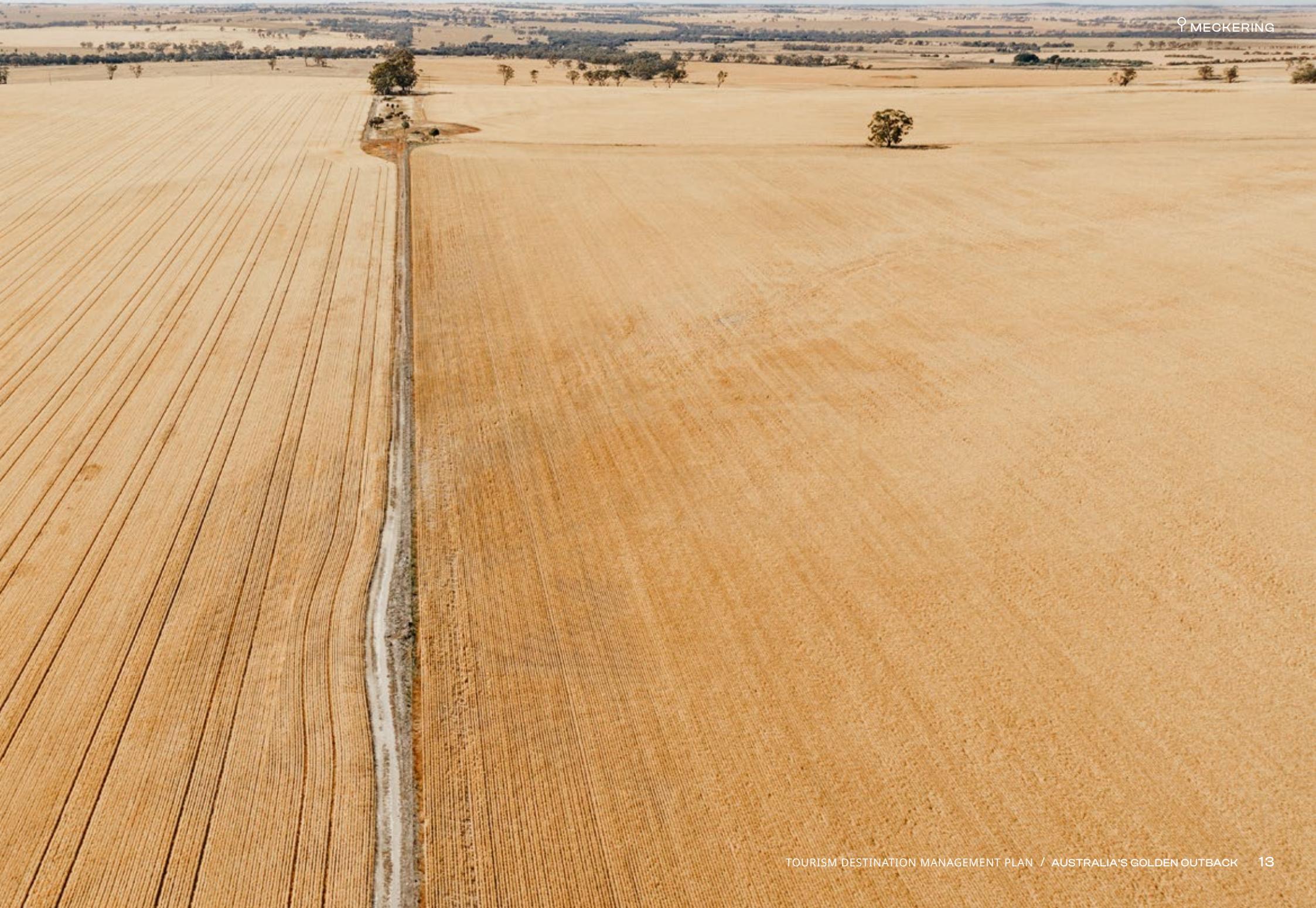


10-YEAR VISION

The AGO region is a truly unique destination where visitors can traverse remarkable open landscapes, engage with connected communities and witness unrivalled natural beauty.

Access	Visitors can easily and safely navigate to and within the vast open spaces of the region, traversing unrivalled natural beauty with ease and comfort. The region is rugged, diverse and accessible. Travellers are encouraged to look for otherworldly experiences and immerse themselves in the region's natural beauty.
Attitudes	AGO will be recognised for its authenticity, diversity and inclusion, boasting connected communities, culture and heritage. Stakeholders understand the tangible benefits that tourism brings to the region. Travellers want to return because they are genuinely welcomed and celebrated.
Administration	Government enables the tourism industry to thrive. Development is encouraged, and small businesses are supported. The economy thrives through coordinated decision-making, appropriate planning and intelligent investment strategy.
Attractions	There is a breadth of tourism offerings across the subregions. Visitors have choice in where they stay, what they do and how they do it. Whether they seek adventure, solitude, or simply a chance to disconnect from the modern world, the AGO region has it all.





10-YEAR TOURISM GOALS & PRIORITIES

1. Prioritise increases in aviation, self-drive and cruise sector connections by growing capacity and infrastructure.

- Complete the sealing of Western Australia's section of the Outback Way and, in conjunction with Traditional Owners, prioritise investment to provide required visitor facilities and amenities.
- Support the expansion of drive tourism routes to encourage visitor dispersal.
- Explore the opportunity to establish regular passenger transport aviation services to Kalgoorlie-Boulder and Esperance from the east coast.
- Deliver infrastructure upgrades at the Kalgoorlie-Boulder and Esperance airports to support aviation route development and capacity.
- Deliver infrastructure upgrades to support cruise visitation at the Port of Esperance.

2. Grow and diversify accommodation offerings in the region.

- Grow and diversify the accommodation offer by encouraging investment in new development that meet the needs of priority markets, focusing on key tourism hubs around major attractions.
- Enhance the station stay experience across the region to allow stations to provide their unique point of difference. Work collaboratively to ensure a similar level of service across providers.

- Seek the development of accommodation offerings in and around national parks, conservation parks, and nature reserves.

3. Refresh existing and develop new unique experiences.

- Enhance the visitor facilities and infrastructure at key attractions, national parks and reserves to support visitation.
- Expand the range of bookable tour products to elevate the visitor experience, focusing on:
 - Dark sky tourism experience development, including the 'Murchison Vast Sky Experience' as an anchor dark sky attraction in the AGO region;
 - The AGO region's big rocks, including Wave Rock, Burringurrah/Mount Augustus and Walga Rock; and
 - Recreational trail development throughout the Wheatbelt, including walk, cycle and drive.
- Develop agritourism experiences as part of the implementation of AGO's Agritourism Development Strategy in the Wheatbelt, Gascoyne Murchison and Esperance and South Coast.
- Support a more extensive portfolio of unique experiences to leverage cruise demand in Esperance and encourage further dispersal of visitors throughout the region.

4. Create and utilise unique events to promote visitor dispersal.

- Develop a portfolio of events across the year to encourage inter-regional and intrastate travel.
- Support the development of a significant event in the region, to showcase regional strengths and grow demand during shoulder seasons.

5. Build upon the AGO brand assets.

- Continue to market road-trips, while highlighting the region's unique and diverse experiences. Establish the AGO region as the premium destination for road-tripping in WA.
- Establish subregional differentiation through storytelling and promotion of signature and unique assets.
- Continue to develop the Esperance experience and brand proposition.

6. Improve the capacity and capability of the tourism sector to ensure its sustainability.

- Increase the pool of tourism and hospitality workers through targeted strategies.
- Provide training and mentoring opportunities for operators to improve visitor experience, develop new products, and retain and upskill workers.

7. Develop, grow and showcase Aboriginal tourism.

- Integrate Aboriginal culture into existing offerings and develop new and unique hero experiences championed by Traditional Owners (TOs).
- Implement priority actions from the Jina: WA Aboriginal Tourism Action Plan 2021-2025 (or future editions) related to AGO, including the Camping with Custodians Program.
- Support the establishment of an Aboriginal experience at Walga Rock in collaboration with the Wajarri Yamaji Aboriginal Corporation (WYAC).

PART 2: UNDERSTANDING THE REGION





AUSTRALIA'S GOLDEN OUTBACK TOURISM REGION OVERVIEW

AGO is a vast region covering 54 per cent of Western Australia's landmass. The region stretches from Esperance in the south, through the Goldfields and Murchison in the north, and out to the Gascoyne and Wheatbelt in the west. Bordering all of the other tourism regions in the state, the AGO region is the main access point for overland traffic from the east of Australia and key routes from the north.

The AGO region is characterised by stunning landscapes, unique wildlife, and rich cultural heritage. The visitor experience is underpinned by the region's people and diverse history. From ancient Aboriginal culture to outback agricultural experiences, there are opportunities for travellers to immerse themselves in diverse art, heritage, events and activities.

The people and communities of the AGO tourism region are valuable assets for developing tourism to build, invest, innovate, host, and tell stories. With 5,100 people directly and indirectly employed in tourism in the region in 2021-22, there is significant human and cultural capital to invest in.

For this TDMP, the AGO region has been divided into four tourism subregions:

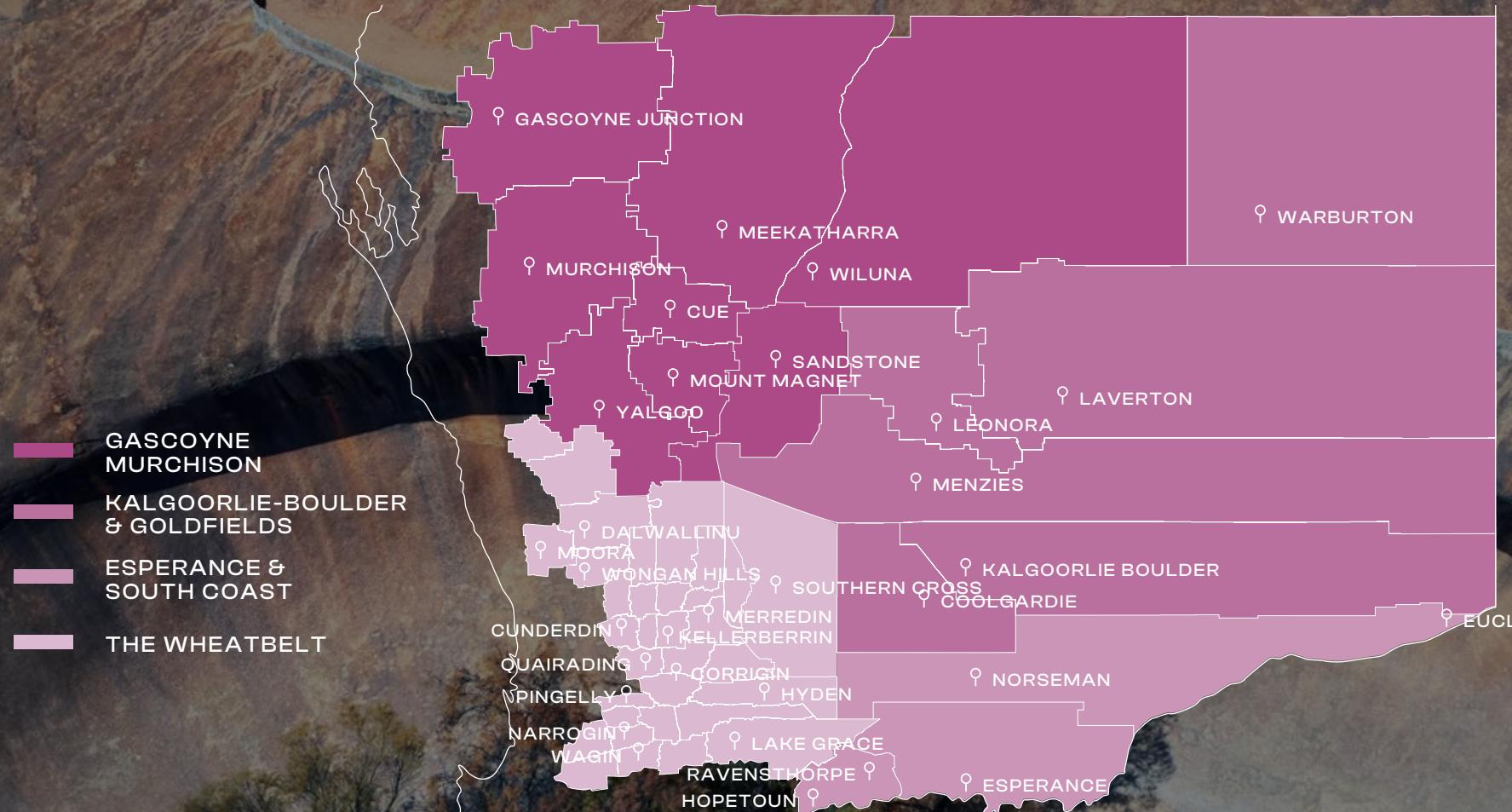
- **Gascoyne Murchison**
- **The Wheatbelt**
- **Esperance and South Coast**
- **Kalgoorlie-Boulder and Goldfields**

In 2023, the AGO region attracted over 1.42 million overnight visitors who stayed 8.95 million nights and spent \$1.15 billion. Destination maturity varies across the subregions, with the Gascoyne Murchison being the most underdeveloped due to the vast distances between visitor hubs. The Wheatbelt is a developing area, as are portions of the Goldfields, while Kalgoorlie-Boulder, and Esperance and South Coast are the most visited and established tourism destinations in the AGO region.

In 2021-22, tourism (direct and indirect) in the AGO region was worth \$499 million by Gross Value Added (GVA). Tourism is an important industry for the region; however, it is overshadowed by the large resource sector. In

2021-22, tourism represented 7.2 per cent of the region's total employment but only 1.4 per cent of the region's total GVA. Building a more diverse economy is critically important for the region's resilience.

The tourism industry has a significant role in supporting the resource sector and contributing to the economy by improving liveability and quality of life. Ensuring the tourism industry brings value to the community through positive connections, higher yields and engaged visitors requires focused and effective planning.



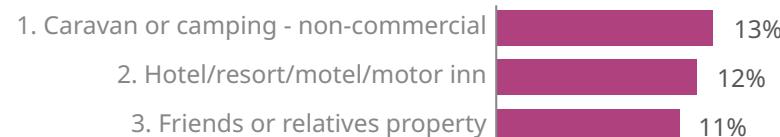
VISITOR ECONOMY

VISITOR PROFILE (2023)

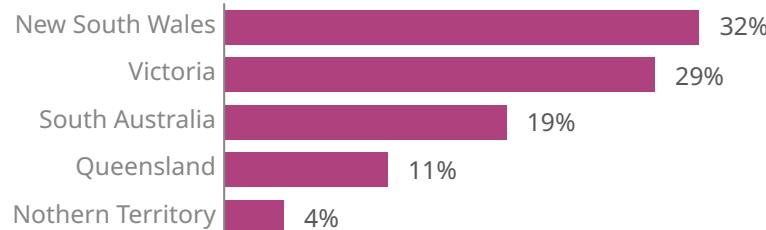
1.42 million overnight visitors spent a total of \$1.15 billion

- 96 per cent domestic (staying an average of 5.7 nights)
- Four per cent international (staying an average of 22.3 nights)

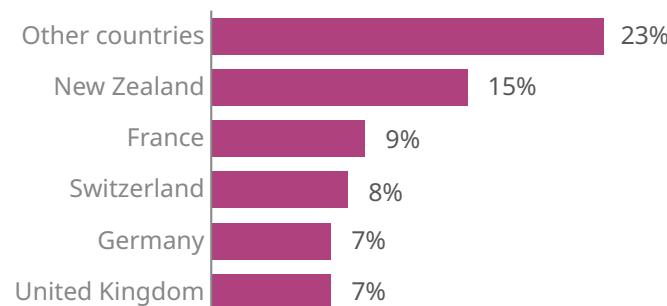
TOP 3 ACCOMMODATION TYPES (% OF NIGHTS) - DOMESTIC



INTERSTATE MARKETS TOP HOME STATE/TERRITORY 2022/23



INTERNATIONAL MARKETS TOP HOME COUNTRIES 2023



The AGO region has traditionally attracted more intrastate visitation than interstate and international. In 2023, the AGO region welcomed 1.42 million overnight visitors, staying 8.95 million nights and contributing \$1.15 billion to the region's economy. Table 1 shows a comparison of the average of visitors, nights and spend in each subregion for 2022+23. Due to sample sizes, international data is reflective of YE 2023. Highlights in green indicate the top scores for each subregion, yellow/orange for mid scores, and red for the lowest scores.

Subregion	Market	Visitors (000)	Nights (000)	Expenditure (\$M)
ESPERANCE & SOUTH COAST	International	33	245	11
	Domestic overnight	305	1,290	229
	Total	338	1,535	240
KALGOORLIE-BOULDER & GOLDFIELDS	International	18	617	15
	Domestic overnight	459	3,165	478
	Total	477	3,782	493
THE WHEATBELT	International	11	271	13
	Domestic overnight	449	1,655	156
	Total	460	1,926	169
GASCOYNE MURCHISON	International	NP	NP	NP
	Domestic overnight	214	1,174	154

Table 1: Distribution of visitors, nights and spend across the region (domestic visitation 2022/23 average, international visitation 2023 only).

NOTE: Due to small sample sizes, Domestic has been calculated as a 2 year average of 2022 + 2023. International is individual years. Totals are a sum of these 2 different methodologies so should be used with caution.

VISITOR CHARACTERISTICS

The assurance of vastness and open spaces has become particularly important to city-based source markets.¹ This works in favour of the AGO region, as experiencing the freedom of drive journeys is a key aspect of the brand promise for the region.

The dominant leisure visitors to the AGO region are people from within Western Australia, travelling as a couple or with friends and relatives, caravanning or camping, and staying for one to three nights. In 2023, around 96 per cent of visitors to the region were from Australia, and four per cent international.²

The top activities for domestic visitors to the AGO region are eating at a café/restaurant, followed by pubs/clubs and visiting friends and relatives. 91 per cent of international visitors indicated eating at a café/restaurant as their top activity, followed by sightseeing and going to the beach.² The lack of engagement in commercial activity and the predominance of camping and caravanning is likely to be responsible for the region's lower spend per night than the state average.



¹ Tourism Australia. Sourced from Luxury Travel Advisor <https://www.luxurytraveladvisor.com/australia-new-zealand/tourism-australia-predicts-top-global-travel-trends-for-2021>

² Tourism WA, sourced from Tourism Research Australia, National Visitor Surveys (2022, 2023)

MARKET SEGMENTATION & POSITIONING

MARKET DATA AND SEGMENTATION

Source market and market segmentation data and practice are generally limited to the top-line definitions (domestic day, domestic overnight, international overnight) with limited data on what drives visitor demand and potential niche/emerging markets.

HIGH-YIELDING TRAVELLERS

Tourism WA focuses its marketing activities on targeting the High Yield Traveller (HYT) segment, which is predominantly visitors from key international markets and interstate markets. This market is not challenged by long-haul travel, has an above-average trip spend, and seeks world-class nature and wildlife, a safe and secure destination, good food and wine, local cuisine and produce, world-class coastlines, beaches and marine wildlife, and rich history and heritage.

Recognising that the current market for the AGO region primarily consists of young families travelling through Australia, as well as backpackers and working holiday makers, it is essential to consider these visitors alongside the long-term goal of targeting HYTs.

Priorities and actions in the TDMP and associated RTDSs are therefore designed to reflect the interest of these markets alongside HYTs.

DESTINATION MARKETING

Current destination marketing responsibilities are outlined as follows:

- Tourism WA's activity currently focuses on attracting HYTs from international and interstate markets.
- The AGO RTO is primarily responsible for intrastate markets and supporting Tourism WA in interstate markets.
- Local Tourism Organisations (LTOs) are responsible for marketing the subregions to intrastate markets.
- Visitor Centres (VCs) are responsible for providing information to visitors once they arrive at a destination, that encourages them to stay longer, spend more money, experience more attractions and revisit.

GLOBAL TOURISM WA BRAND – WALKING ON A DREAM

Walking On A Dream is Tourism WA's global tourism brand, which aims to elevate the profile of Western Australia as a unique destination within a highly competitive global marketplace to turbocharge visitation and boost the WA economy. The Walking On A Dream creative concept positions Western Australia as a

wondrous, otherworldly, dreamlike and aspirational destination. Walking On A Dream weaves the themes of Time, Space, Connection and Freedom into the WA narrative. These thematic pillars represent key attributes that global travellers seek from a destination in a post-pandemic world.

The Walking On A Dream creative concept give Tourism WA's marketing and communications the uniqueness needed to make Western Australia shine as an aspirational, memorable and desirable destination for leisure and business travel, from now and into the future, and provide a vital element of the framework to inform actions and priorities identified within the TDMP.

AGO BRAND POSITIONING

Capitalising on the AGO region's inherent qualities and competitive advantage is critical to the success of the tourism industry. The AGO brand is positioned to celebrate the region's uniqueness, vastness and diversity by highlighting drive journeys as a way to experience this.

ACCESS

Access plays a fundamental role in determining the success of a region's tourism industry. It refers to the physical connectivity and ease of travel within and to the destination, encompassing various modes of transportation such as air, road, rail, and sea. The availability of efficient and well-connected transportation infrastructure significantly influences the attractiveness of a region to tourists.

Tourism infrastructure in the AGO region is relatively limited and has been identified by the tourism industry as a priority focus for future development. The following is an outline of the physical connections to and within the AGO region.

SELF-DRIVE

Roads are critically important in the AGO region because of the region's dependency on drive journeys. Major roads connect Kalgoorlie-Boulder and Esperance to both the east and west. Major towns in the Wheatbelt and Gascoyne Murchison subregions are linked by road, however there is still a need for additional sealed roads to improve access to key subregional attractions to enhance the visitor experience.

The Wheatbelt Way is a positive example of how interpretive signage and good quality, sealed roads can support the development of the AGO region's road-trip experiences. This needs to be explored in context of the development of the Outback Way, which extends 2,720 kilometres from Laverton in Western Australia to Winton in Queensland, with the Western Australian section of the highway to be sealed by 2030.

AVIATION

Esperance has RPT flights operated by Rex, however, the airport currently only has the capacity to take smaller planes. This is a limiting factor for increasing visitor volumes to the region.

Virgin and Qantas service Kalgoorlie-Boulder Airport, with numerous daily connections from Perth. Kalgoorlie-Boulder Airport previously offered interstate connections to Melbourne and Adelaide, which were mainly used for business/work travellers, but also provided tourism access. Discussions are underway to re-establish more interstate routes to grow visitation to the region.

Ravensthorpe Airport has the infrastructure to handle the current Rex RPT services, and discussions are underway to determine the business case for an expansion to Ravensthorpe's RPT service.

CRUISE

Esperance is one of Western Australia's 11 cruise ports. A \$4 million project to improve cruise ship infrastructure in Esperance commenced in 2020, which will enhance cruise tourism opportunities for the AGO region.



RAIL

The Prospector train line, operated by TransWA, offers a public rail connection between Perth and Kalgoorlie. The journey takes approximately seven hours and departs at least once a day from Perth. The Indian Pacific luxury rail journey, operated by Journey Beyond Rail, provides interstate access to the AGO region from Adelaide.

REGIONAL TOURISM INFRASTRUCTURE

As well as transportation infrastructure, communication infrastructure is imperative to make tourism work in a region. Effective communications and digital infrastructure are critical to a successful tourism industry, for safety, connectivity, booking and researching, posting reviews, and sharing on social media. Considering the reliance on self-drive within the AGO region, communication is also critical to inform visitors of necessary permits, biosecurity, road conditions, and the types of vehicles suitable for different sections of road.

The AGO region still has significant areas with no reception, which inhibits the global social media-sharing machine that underpins destination marketing. In addition, it presents safety challenges for communities and visitors alike. There is a need to prioritise the upgrading of digital infrastructure, as maintaining regional connectivity is a priority for tourism operators and the safety of visitors.

ACCOMMODATION

Accommodation refers to lodging options such as hotels, resorts, caravan parks, campgrounds and short stay rentals. It is essential for tourism as it provides a comfortable base for visitors to explore the region's attractions. Accommodation infrastructure drives destination development, attracting more tourists and encouraging investment. Good accommodation enhances visitor experiences and satisfaction. It also has significant economic importance, generating revenue, creating jobs, and stimulating other sectors. The availability and quality of accommodation can influence the length of tourists' stays, leading to increased spending and benefiting local businesses.

With 1,941 short stay rooms and 324 Airbnb listings⁴, accommodation supply is a constraining factor for tourism development in the region. Esperance has experienced shortages in accommodation in recent years. However, the style and quality of accommodation are not geared towards engaging a HYT market for the region. Recent diversification of AGO's accommodation offering has included increasingly popular station stays, which add a unique and connected experience for travellers.

The following table provides a view of accommodation offerings within the AGO region, collated using the Australian Accommodation Monitor (which includes: hotels, motels, serviced apartments and cabins in caravan parks of 10 or more rooms) and Inside Airbnb. Reliable data is not available for campgrounds and caravan sites. Please note there still may be discrepancies in this data, and the State Government is progressing initiatives to better collect data on the accommodation market.

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⁴ Tourism Western Australia 2022 — Accommodation Dashboard

AGO WIDE

Overall, there is a shortage of tourism accommodation in the AGO region. Accommodation stock is generally older and skewed towards independently owned commercial accommodation, with 25 independent offerings, compared with nine chains. AGO has few luxury accommodation offerings, with upscale (four to five-stars) accommodation only available in Kalgoorlie-Boulder.

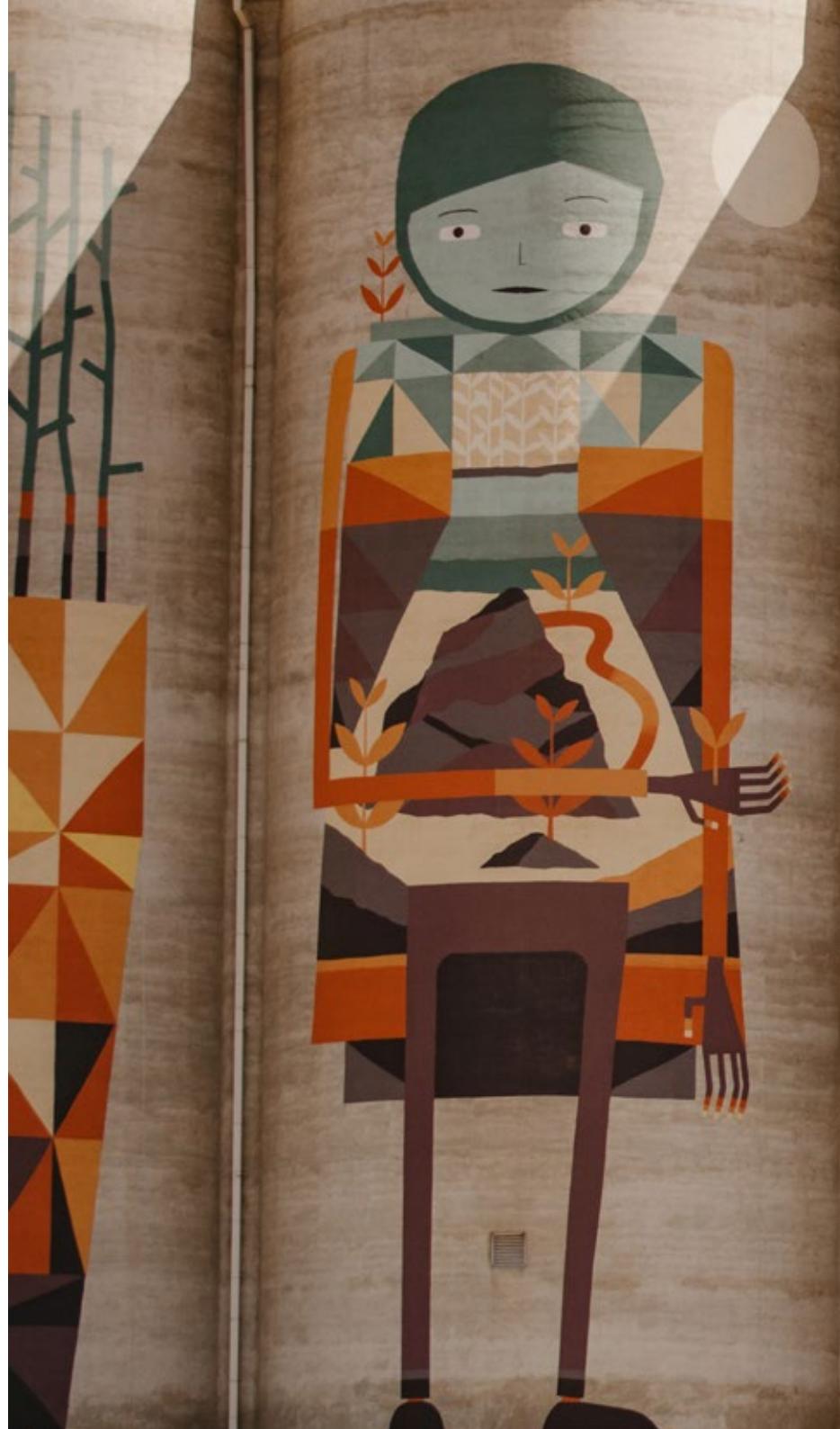
GASCOYNE MURCHISON	KALGOORLIE-BOULDER & GOLDFIELDS	THE WHEATBELT	ESPERANCE & SOUTH COAST
<p>The accommodation offering in the Gascoyne Murchison subregion is limited, primarily focused in the town of Meekatharra, which has three hotels of an economy class or 'basic' standard. Additional accommodation offerings are located in the towns of Mount Magnet, Sandstone, Cue, Yalgoo and Murchison, alongside station stays in the subregion.</p> <p>Approximate total of hotel beds 78 and short stay homes/rooms 11</p>	<p>A wide range of accommodation is available in the Kalgoorlie-Boulder and Goldfields subregion to suit a variety of needs, including 10 economy style properties, four midscale, and three upscale. There is a mix of commercial and private short stay dwellings. In addition, 13 of the 17 properties have attached dining facilities.</p> <p>Approximate total of hotel beds 1,069 and short stay homes/rooms 120</p>	<p>The accommodation offer in The Wheatbelt is mainly comprised of motels, motor inns, chalets and caravan parks. There is no chain hotels or resorts throughout the Wheatbelt; instead the subregion is supported by a diverse range of small independent operators such as bed and breakfasts, station/farm stays, roadside inns and self-contained accommodation options.</p> <p>Approximate total short stay homes/rooms 30</p>	<p>The majority of accommodation along the South Coast is located in Esperance, with 13 offerings, while there is only one option in Ravensthorpe.</p> <p>Accommodation in Esperance is comprised of 10 independently owned properties and three that are part of commercial chains. The region has a mix of hotels, motels and holiday parks alongside a range of private short stay dwellings. The offering is largely low to mid range, making up 64 per cent of the total. Further research shows two hotels in Hopetoun and one caravan park.</p> <p>Approximate total of hotel beds 408 and short stay homes/rooms 195</p>

Table 2: AGO accommodation profile (2022)

ACTIVITIES, ATTRACTIONS & EVENTS

Activities, attractions, and events play crucial roles in tourism industry development and the depth, diversity and uniqueness of these experiences significantly influences visitor's decision when choosing a holiday destination. Providing a range of activities, attractions and events can enhance the visitor experience, generate economic benefits and employment opportunities, differentiate a destination, and increase length of stay and visitor dispersal. They also provide communities with opportunities to actively participate in tourism and share their culture, heritage and traditions with visitors.

Rather than singular hero experiences in the region, there is a collection of attractions centred on self-guided drive journeys. A range of drive trails allow visitors to explore the rich culture and heritage and stunning natural landscapes of the AGO region, from vast deserts and rugged coastlines to ancient rock formations.





EVENTS

Events play a valuable role in adding vibrancy to a destination, giving visitors a time-certain reason to visit, disperse across the region or stay an extra night in a location. A selection of key events within the AGO subregions are listed in the table on page 31. There is the opportunity to establish a significant event for the AGO region, to showcase regional strengths and grow demand during shoulder seasons.

Business events include conferences, tradeshows, meetings, seminars, and corporate and incentive events. The demand for a business event is driven mainly by organisations choosing it as a forum to communicate messages, to educate or train, to promote a product, to reward or celebrate, to collaborate on issues and solutions, or to generate resources. Business events are a highly competitive market, with WA competing against domestic and international competitors to secure business events for the state, a role currently undertaken by Business Events Perth (BEP). BEP prioritises its member venues and suppliers for these opportunities. Local/state business events (corporate or association meetings) are not actively pursued by BEP, however, these local business events are attracted to regional areas that have the necessary facilities to accommodate their needs, and may be a lucrative market for destinations seeking to expand their inbound visitation.



GASCOYNE MURCHISON	THE WHEATBELT	ESPERANCE & SOUTH COAST	KALGOORLIE-BOULDER & GOLDFIELDS
Station stays and outback experiences	Farm stay experiences	Farm stay experiences	History and heritage – heritage buildings in Kalgoorlie-Boulder and Coolgardie
National parks – Mount Augustus, Kennedy Range	Public Silo Trail – Merredin, Newdegate	Coastal walks and trails – Cape Le Grand, Cape Arid, Fitzgerald River National Parks	Stories of gold rushes, pioneering settlers, and the construction of the famous Trans-Australian Railway and CY O'Connor Pipeline
Mining and pastoral museums	Wildflower trails and experiences	Dark sky tourism – stargazing	Lake Ballard – “Inside Australia” exhibition
Geotourism – Burringurrah/Mount Augustus, Walga Rock, Murchison GeoRegion	Aboriginal culture	Marine experiences – surfing, fishing, snorkelling, whale watching and world-class beaches	National parks, nature reserves and station stays
Wildflower trails and experiences	Merredin Military Museum, Nungarin Heritage Machinery and Army Museum	Archipelago of the Recherche – Middle Island (Lake Hillier) and Woody Island (eco experiences)	Gwalia Ghost Town and Museum
Mining and gold rush heritage – gold prospecting and fossicking	Dark sky tourism – stargazing	Scenic flights over Esperance and Lake Hillier	Mining history and attractions – Super Pit, Hannans North Tourist Mine
Aboriginal culture	Kulin Tin Horse Highway	Esperance Stonehenge	Nullarbor links – the world's longest golf course
Self-drive and four-wheel driving experiences – Road to the Rock, Gascoyne Murchison Outback Pathways (cross-regional)	Geotourism – Wave Rock, Elachbutting Rock	Aboriginal culture	Museum of the Goldfields, Boulder War Museum
Dark sky tourism	Nature reserves and parks	Public Silo Trail – Ravensthorpe	Aboriginal culture – Laverton Aboriginal Art Gallery, Goldfields Aboriginal Art Trail
Events and festivals – Junction Races, agricultural shows, racing events, Meekatharra Outback Festival	Self-drive and four-wheel driving experiences – Wheatbelt Way, Granite Loop Wildflower Trail, Wave Rock Wildflower Trail, Pioneers Pathway, Pathways to Wave Rock, Wildflower Way (cross-regional)	Self-drive and four-wheel driving experiences – Esperance Wildflower Trail, Great Ocean Drive, South West Edge (cross-regional), Nullarbor Plains crossing	Self-drive and four-wheel driving experiences – Norseman Heritage Trail, Goldfields Wildflower Trail, Gunbarrel Highway, Golden Pipeline Heritage Trail, Golden Quest Discovery Trail, Leonora Loop Trail, The Outback Way, Anne Beadell Highway, Canning Stock Route (cross-regional)
Big Bell Ghost Town	Events and festivals – Wave Rock Weekender, Kulin Bush Ranges, Dowerin Field Days, Wyalkatchem Rodeo, Narrogin Revheads Weekend, Kondinin Art Show, wildflower festivals, agricultural shows	Eyre Bird Observatory	Events and festivals – Kalgoorlie Cup, Kalgoorlie Boulder Multicultural Festival, Leonora Golden Gift and Goldfields Cyclassic Weekend, Red Dust Revival, Kalgoorlie Desert Race, St Barbara's Day Parade, Nullarbor Muster
		Events and festivals – Ravensthorpe and Esperance Wildflower Show/Festival, agricultural shows, markets	

Table 3: Activities, attractions and events of the AGO

DEVELOPMENT PILLARS

The following development pillars have been selected to delineate essential areas of focus for the sustainable growth and success of the AGO tourism region. Through a desktop analysis of the currently marketed activities, attractions and events, this evaluation identifies areas with potential for growth and development within the subregions.

There are emerging products, attractions and experiences across the development pillars in the Esperance and South Coast and Kalgoorlie-Boulder and Goldfields subregions, providing opportunities to further establish tourism product that leverages their natural and cultural assets. Strategic marketing efforts should capitalise on signature elements that may drive visitation, such as heritage in the Kalgoorlie-Boulder and Goldfields subregion. Gascoyne Murchison and the Wheatbelt are significantly underdeveloped in terms of tourism product when considered alongside the other subregions.

Over the TDMP's 10-year timeframe, the product development focus, when established and resourced, should continue to strengthen the five shared product pillars across the AGO region and enable differentiation at a subregional level. Product development resources and focus should align with and reinforce each subregion's unique brand positioning and future marketing focus.

ACTIVITIES, ATTRACTIONS & EVENTS	ESPERANCE & SOUTH COAST	KALGOORLIE-BOULDER & GOLDFIELDS	GASCOYNE MURCHISON	THE WHEATBELT
NATURE/BIODIVERSITY	E	E	E	D
ABORIGINAL CULTURE	E	E	D	D
HERITAGE	E	S	D	D
ADVENTURE	E	E	E	D
EVENTS & FESTIVALS	E	E	D	D

LEGEND

- S** SIGNATURE: Product well established and represented in destination marketing.
- E** EMERGING: Product is established, growing representation in destination marketing.
- D** DEVELOPMENT OPPORTUNITY: Limited established product.

Table 4: Development pillars AGO





PART 3:
INSIGHTS INFORMING THE TDMP

This aerial photograph captures a dramatic landscape. The upper portion of the image shows a terrain with reddish-brown soil, characterized by distinct, parallel, and slightly wavy ridges. Scattered across this surface are numerous small, green, bushy shrubs. Below this, a large, dark, almost black, body of water stretches across the middle of the frame. The water's edge is marked by a dense line of these same green shrubs. In the bottom foreground, another cluster of these green shrubs is visible, growing on a surface that appears to be a mix of reddish-brown soil and some darker, possibly rocky or organic material. The overall scene is one of a dry, arid environment with a sharp transition to a body of water.

© MOUNT AUGUSTUS NATIONAL PARK

DESTINATION MATURITY OF THE AGO SUBREGIONS

The destination maturity of the AGO's subregions has been determined through analysis of the current visitor economy, market awareness, access, accommodation, activities, attractions and events. According to Butler's Tourism Area Life Cycle Model (1980), tourism destinations go through different stages of maturity, including exploration, involvement, development, consolidation, stagnation, and decline or rejuvenation. A mature tourism destination typically exhibits a well-established and diverse range of offerings, well-developed tourism infrastructure, and effective destination management practices. Understanding the maturity level of a destination helps in identifying its strengths, weaknesses, and potential areas for improvement to attract visitation and ensure the sustainability of the tourism sector. The following identifies and assesses the destination maturity of the subregions in the AGO region, identifying the areas required for improvement to enable the subregions to move upwards in the life cycle model.





Figure 1: AGO tourism destination life cycle
Model Source: Butler (1980)

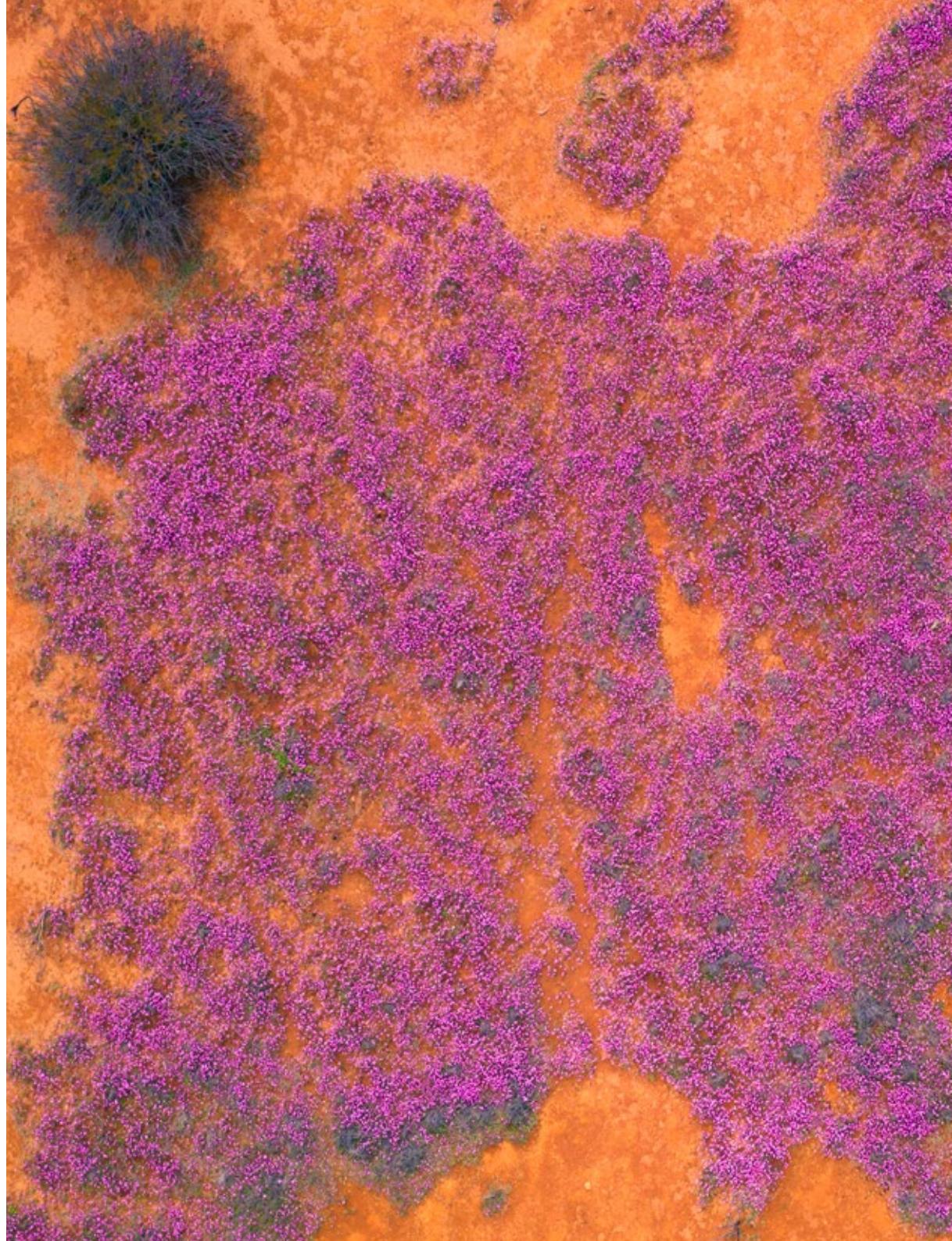
SUBREGIONAL TRANSITIONS

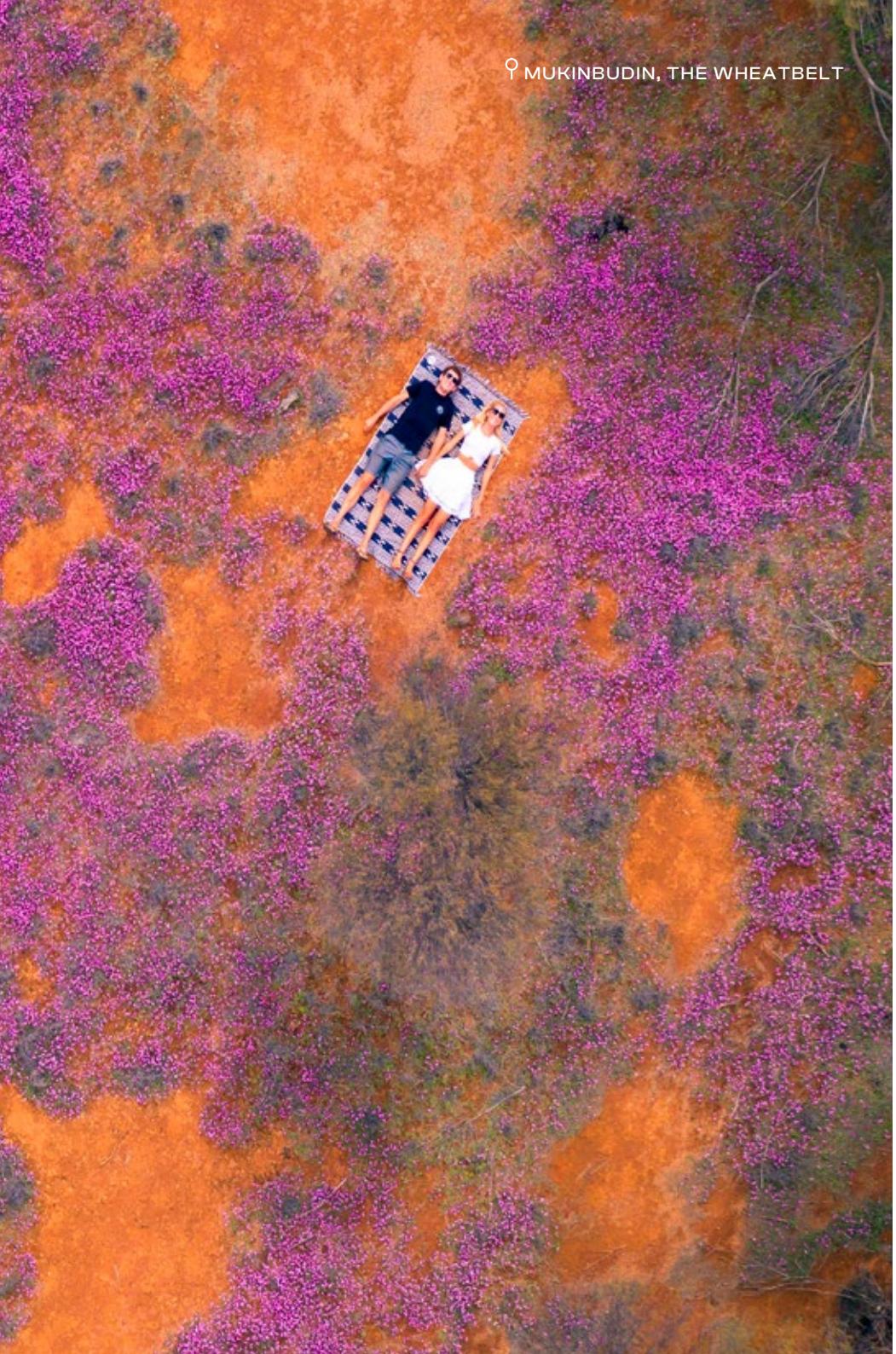
GASCOYNE MURCHISON: INVOLVEMENT ONWARDS

The Gascoyne Murchison tourism subregion is in the involvement phase of growth. There is a need for further development of tourism product throughout the subregion in order to propel it through the destination life cycle. At this stage, there is a need for hero products that attract and disperse travellers through the AGO region into the Murchison. An example of such a product is the proposed Murchison Vast Sky Experience, which aims to provide a unique dark sky viewing platform, touring product and associated accommodation. A development such as this could encourage visitation and overcome the barrier of its geographic isolation.

THE WHEATBELT: TRANSITION TO DEVELOPMENT STAGE

The Wheatbelt subregion is moving from the involvement to development stage of growth. Investment in tourism infrastructure will support continued growth in visitor numbers, including the development of unique or experiential accommodation to attract higher-yield markets. Currently, there is limited accommodation in the Wheatbelt with only a small number of locally-owned operators and no large branded chains. Capacity building and industry support will be critical to enhance the quality of services, and range and number of experiences in the subregion to support its growth. There is also a need to help regional businesses better understand the tourism market they are servicing, and the level of service expected, in order to ensure consistency and enhance the visitor experience.





© MUKINBUDIN, THE WHEATBELT

ESPERANCE & SOUTH COAST: DEVELOPMENT TO CONSOLIDATION

Esperance is at the beginning of the development stage, categorised by growth in tourism arrivals, and national recognition for its natural assets. Investment into the Esperance Airport and upgrading the Port of Esperance will support new aviation and cruise arrivals, and contribute to the growth of the destination. At this time, it is essential for the Esperance and South Coast subregion to commit to investment in accommodation, restaurants and attractions to meet the growing demand and visitor expectations.

Improved air access to this subregion may act as a catalyst for tourism investment in the future. As awareness of the Esperance and South Coast subregion grows, there is a need for increased marketing and promotion to elevate the subregion into a competitive tourism destination.

KALGOORLIE-BOULDER & GOLDFIELDS: MOVE TO CONSOLIDATION

The Kalgoorlie-Boulder and Goldfields subregion is the furthest along the life cycle, due to its higher visitation numbers. At this stage, tourism is a significant contributor to the local economy, however, the mining and agricultural industries remain the strongest.

Many of Kalgoorlie-Boulder's tourism offerings, namely accommodation, are utilised by business travellers, making it difficult to discern visitation drivers. Furthermore, because of the demand from other sectors, there can be limited availability of flights and accommodation throughout many parts of the year, putting pressure on providers and creating shortfalls for the traditional leisure traveller. As such, there is the opportunity to develop more visitor-focused accommodation to combat competing interests, including unique or signature short stay accommodation that capitalises on the assets of the subregion.

Continued development of the capability and capacity of the tourism industry to deliver exceptional experiences will be necessary to achieve industry expansion and reach the consolidation stage in the tourism life cycle.

TRENDS & FOCUSES

GROWTH IN SELF-DRIVE

In 2021, the caravan and camping industry recorded a \$23.8 billion impact to the Australian economy. (Source: Caravan Industry Association of Australia).

People increasingly seek to avoid dense, crowded spaces, presenting a significant competitive advantage and a perfect unique selling point (USP) for regional destinations such as AGO.

The region offers a strong mix of camping options, with many campgrounds located in nature reserves and within national parks to provide a unique and natural experience. Growing the number of unique campgrounds that offer immersive experiences, such as farm/station stays, will provide more diversity to the offer. This may include experiences at Mellenbye Station, a working cattle station, or bush camping at Karalee Dam.

ABORIGINAL TOURISM

The appeal of Aboriginal tourism experiences is growing globally. According to the International Visitor Survey, in 2019, approximately 1.4 million international visitors took part in an Aboriginal experience on their holiday to Australia. Tourism WA is committed to the expansion of Aboriginal tourism in the state in partnership with key stakeholders such as the Western Australian Indigenous Tourism Operators Council (WAITOC).

With over 80 per cent of visitors expressing interest in taking part in an Aboriginal tourism experience, Tourism WA views Aboriginal tourism as a key pillar and differentiator for the state's tourism offer. However, currently only 17 per cent of visitors are able to undertake an Aboriginal tourism experience for a variety of reasons, including a lack of accessible time or products. It is therefore crucial to consider opportunities for Aboriginal tourism experiences in product development and planning.

Many Aboriginal corporations and groups in the AGO region seek to develop tourism products. This presents a significant opportunity for the region to build unique tourism products and cultural experiences.

ACCESSIBLE AND INCLUSIVE TOURISM

The need to provide greater inclusivity for visitors to the region, through the development of accessible tourism facilities and attractions, is growing. In Australia, approximately two million people with limitations or disabilities travel for leisure, plus a similar number who are carers. Tourism Research Australia (TRA) data in 2018 estimated that 20 per cent of Australians had a disability or long-term health condition. By 2050, more than a quarter of the population will be aged 65 or over.

TRA estimated the accessible tourism sector in Australia in 2018 to be worth \$8 billion. As the population grows and demand increases, it is expected that accessible tourism will become even more important.



WORKPLACE CHANGES

The AGO region has the potential to capitalise on the emerging trend of business-leisure tourism or workcationers, where individuals prefer working remotely rather than in a traditional office setting. Employers are recognising the opportunity for their staff to work remotely on a regular basis. This presents a new niche market for the region, of young, digital nomads who can combine their work with extended periods of exploration and productivity, with the key element being their ability to stay connected online. Starlink, Sky Muster and other similar platforms are beginning to enable connectivity even in the most remote areas in the region, and will support the needs of this market.

This trend extends to self-drive family groups and slightly older travelling couples who are seeking more flexibility in their travel plans. They may be interested in working while on the road, as long as there are suitable facilities available at a reasonable cost where they can set up temporarily.

By catering for these audiences and providing suitable amenities such as reliable internet access, comfortable workspaces, and flexible arrangements, the AGO region can attract and accommodate these visitor segments, establishing itself as a desirable destination for remote work and cultural exploration.

DARK SKY TOURISM

Research undertaken in 2021 by Tourism WA demonstrated that dark sky tourism has gained significant appeal among domestic travellers, particularly when combined with nature, wildlife, and other outdoor experiences.

The vast open spaces and minimal light pollution in the AGO region provide an ideal setting for immersive dark sky viewing. Notable locations such as Lake Ballard near Menzies and Lucky Bay in Cape Le Grand National Park offer captivating opportunities for this unique activity. However, despite the region's potential, there are currently few dark sky tour operators in the area, leaving room for growth in this niche market.

AGRITOURISM

Agritourism is a growth engine for Australian agribusiness and incorporates a range of activities that bring together agriculture and tourism-friendly offerings, such as farmers markets and produce outlets, food and wine festivals, combined with natural attractions, culture, music and the art.

In 2018, agritourism in Australia was valued at \$10.7 billion, with six per cent of this attributed to domestic day-trippers, 42 per cent to domestic overnight visitors and 52 per cent to international visitors. The sector's value is expected to increase to \$18.6 billion by the end of 2030. Tourism WA's Market Segmentation Research (November 2021) demonstrates four key insights:

- Five key market segments with distinct needs — connected adventurers, conscious unwinders, indulgers, greying nomads and family explorers.
- The considerable opportunity to embed agritourism as an appealing holiday in travellers' minds.
- An agritourism holiday has strong potential as an add-on activity to an existing trip and coastal destinations like Esperance and South Coast have broad appeal across segments
- Activities that attract high interest include outback camping, historical agricultural exhibits, bush tucker experiences, and farm stays and tours, representing significant opportunity for the AGO region.

Implementation of the AGO Agritourism Development Strategy 2023-2030 will assist in further positioning the region as an agritourism destination.





ADVENTURE TOURISM

AGO is a vast region in Western Australia that encompasses a range of diverse landscapes, including rugged outback terrain, vast salt lakes, stunning gorges, and ancient rock formations. These natural attributes offer significant opportunities for adventure tourism, offering a wide range of activities that cater to all levels of experience and a range of interests.

Popular adventure activities in the region include four-wheel driving, hiking and trekking, cycling, rock climbing and abseiling. Wildlife experiences are also a highlight with experiences such as whale watching and up-close experiences with kangaroos on the beach in Lucky Bay.

ECOTOURISM

Ecotourism includes most forms of nature-based tourism, in which the main motivation for tourists is the observation and appreciation of nature, along with the possibility of learning about traditional cultures in natural areas. Major online booking services such as Trip.com now have over 10,000 eco-friendly travel product offerings on their platform. There is an identified opportunity for the AGO region to develop more ecotourism products, particularly in coastal areas such as Esperance and the Recherche Archipelago.

SUSTAINABLE TOURISM

Combined with the move towards nature-based tourism experiences, modern-day travellers have high expectations of the sustainable credentials of both destinations and experiences. Consumers place greater importance on climate change impacts, their own environmental footprint, and have a growing awareness on how destinations approach the sustainability of their tourism offer.

This trend places greater demand on operators to meet the criteria of a growing audience. Allied Market Research projects the sector to be worth US\$338 billion by 2027, up from US\$181 billion, with increases in both group and solo travel, and notable market-leading growth in the Gen Z age group of travellers.

WILDFLOWER TOURISM

Western Australia's wildflower collection is one of the largest in the world, and Tourism WA research from 2021 demonstrated there is broad consumer interest in wildflower tourism. This presents a unique opportunity to not only attract visitors but also to encourage them to extend their stay by linking various experiences throughout the region.

Promotion of the diverse range of existing wildflower tours, trails and drive itineraries provide further reason for visitor dispersal throughout the AGO region.

INTERNATIONAL MARKET INSIGHTS

Tourism Australia's Future of Demand Research: AGO Region Analysis

The Research

Tourism Australia's (TA) Future of Global Tourism Demand project highlights the experiences that will drive Australia's tourism demand now and into the future across Australia's 19 core international markets, plus Australia.

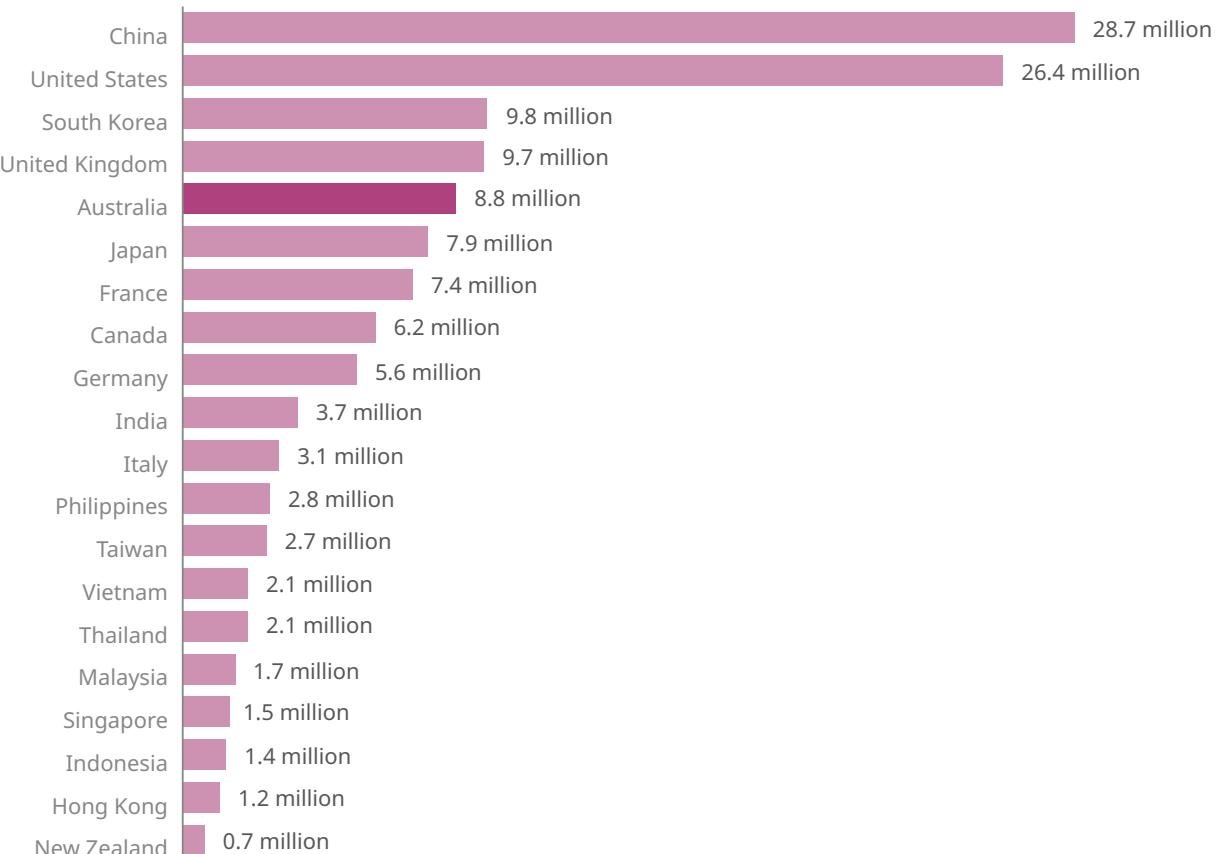
The Method

The research occurred between December 2021 and June 2022 in a collaborative partnership between TA and specialist research agency Fiftyfive5.

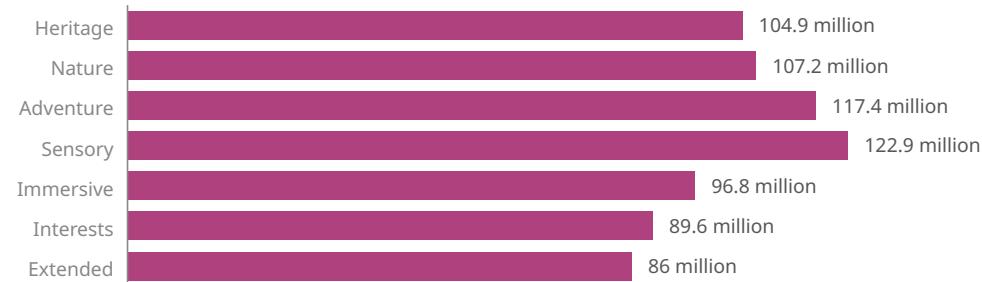
The process engaged close to 24,000 travellers from 20 markets (19 international markets, plus Australian out-of-region travellers).

It actively assessed stakeholder knowledge, published documentation and online conversations to provide a foundation to build hypotheses that were then validated through quantitative survey processes.

ANNUAL OUT-OF-REGION TRAVELLERS TO AUSTRALIA



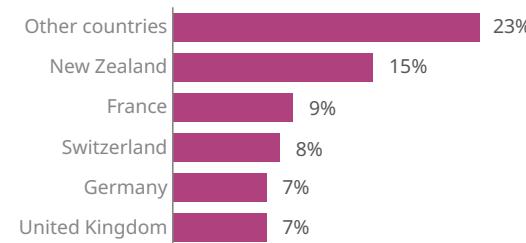
EXPERIENCE SECTORS & SIZE OF MARKET INTEREST



Refer to pages 48 – 52 for a breakdown of each experience sector.

AGO INTERNATIONAL MARKETS

International market visitor breakdown (2023)



HERITAGE EXPERIENCE SECTOR

Heritage travellers experience the world through its places and people. These travellers have an overall interest in history and Indigenous activities.

For travellers from the United Kingdom, the activity of highest appeal is war history.

War museums in the AGO region include the Goldfields War Museum, the Merredin War Museum and the Nungarin Heritage Machinery and Army Museum. Whilst these may not be drawcard experiences for the region, it may be beneficial to market these museums as part of a driving itinerary for UK travellers. Including the Merredin Museum in the itinerary from Perth to Kalgoorlie may encourage road-trip travellers to stop through the town. Part of this itinerary could capitalise off the rich gold and prospecting history in the Goldfields and Esperance regions.

For German travellers, the activity of highest appeal is visiting Indigenous sites.

Germany is the second largest market for AGO. Promotion of projects like Wuddi Aboriginal Cultural Tours, Dabungool Cultural Experiences and Katter Kich Gallery and Tours would appeal to this sector.

French travellers noted a specific interest in community stories and culture. French travellers primarily travel through AGO on road-trips around Australia. As Esperance is a stop on The Big Lap, promoting a farm experience on road-trip itineraries may encourage longer stays in the region.

Italy is a segment to consider targeting, showing a strong interest in history and, notably, a desire to experience historical and cultural sites, museums, and galleries.

NATURE EXPERIENCE SECTOR

Nature travellers immerse themselves in nature via landmarks and wildlife. These travellers have an overall interest in the natural environment and its phenomena.

For the German market, activities of highest appeal are exploring wildlife and nature and marine-life watching.

Promoting Esperance Bird and Animal Park, Esperance Island Cruises, wildflower trails and visiting the Lucky Bay kangaroos could prove effective, to this market.

Marketing the Lucky Bay kangaroos to travellers of French origin may be particularly effective as they highly rate up-close animal encounters.

Malaysia ranks highly for seasonal natural events. Highlighting wildflower drive itineraries could attract the interest of this market and increase visitation.

Italy possesses a strong interest in natural landmarks and wonders. Natural attractions like Wave Rock or Mount Augustus may attract visitation.





ADVENTURE EXPERIENCE SECTOR

Adventure travellers seek activity and exploration through land, sky and water. They are interested in water activities, land and sky exploring, driving, and camping journeys.

For the German market, the activity of highest appeal is hiking and walking, followed by cycling.

Marketing trails through Fitzgerald River National Park, Cape Le Grand, Dryandra Woodland National Park, Stokes National Park, Christmas Rock, Esperance and Hyden, and ensuring access to bike hire and facilities along the way would be central to the interest of this market.

For French travellers, the activity of highest appeal is four-wheel driving/off-roading.

As a region of vast landscapes, four-wheel driving is crucial to access tourist attractions and is a must-do activity. Continued promotion of trails and drive routes including Miners' Pathway, Golden Quest Discovery Trail, Wool Wagon Pathway, Kingsford Smith Mail Run, Pathways to Wave Rock, Outback Way, Canning Stock Route and John Holland Track could attract this market and encourage longer stays in the region.

SENSORY EXPERIENCE SECTOR

This traveller enjoys good food and drink, popular experiences, wellness and culture. They are interested in the arts, wellness, immersive experiences, and food and beverage.

The top overall sensory experience for travellers is dining out, with 13 countries listing it as their highest ranked activity. A considerable weakness in most subregions across AGO is the shortage of dining options. Food and beverage festivals or markets should be considered to combat this issue in the interim. In the long term, significant investment into viable hospitality venues in the region is needed.

China, the United Kingdom and France all fall within the top 13 International Markets for the AGO region, and ranked beaches as the highest activity of choice. These would be effective markets for the region to target.

IMMERSIVE EXPERIENCE SECTOR

This traveller seeks to broaden their world view through learning, education and personal development. They are interested in personal journeys, agritourism, eco experiences and learning.

For the Singaporean market, the activity of highest appeal is farm experiences. Western Australia attracts a high number of Singaporean travellers. Although the current market travelling to the AGO region is limited, this could be expanded through a targeted campaign highlighting the adventure of a station stay.

INTEREST EXPERIENCE SECTOR

Driven by their hobbies and passions, this traveller possesses an overall interest in an array of personal avocations.

The most popular interests are shown to be photography and stargazing, appealing to travellers from Thailand and South Korea. These are not active markets for the AGO region, but could be targeted through photography and night sky touring.

No year-round photography tour nor night sky touring is offered in the region. The AGO region has begun to combat this by adding the 'Ancient Lands Under Brilliant Skies' festival in the Shire of Murchison, however, more products could be developed to attract this cluster.

EXTENDED EXPERIENCE SECTOR

Countries that have a high density of travellers seeking a longer stay in a destination, with complete immersion into the local, culture and an overall interest in living like a local, are New Zealand, Vietnam, Thailand and Indonesia. These countries do not align with the current market share of AGO travellers.



DOMESTIC MARKET INSIGHTS

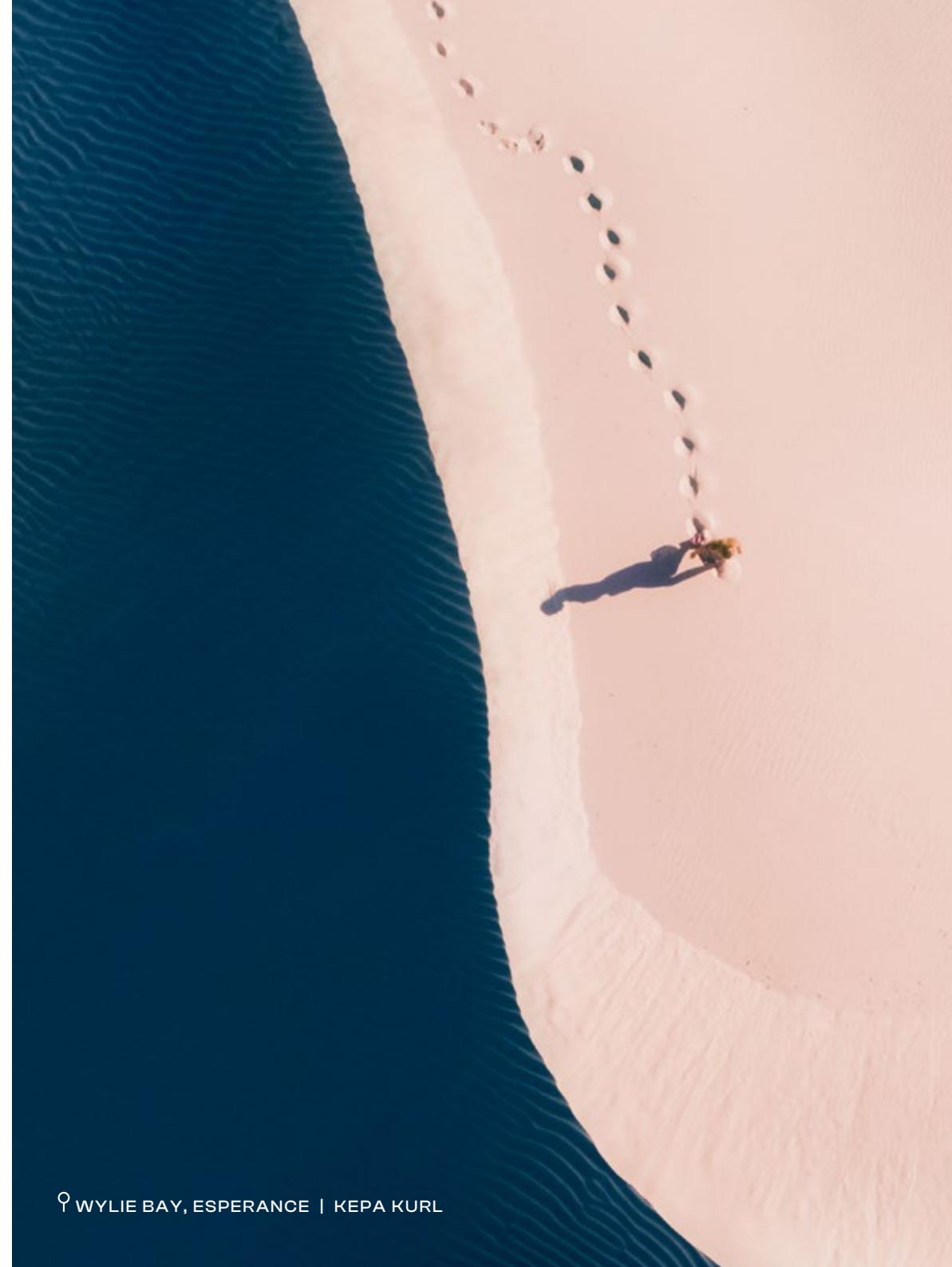
Tourism WA Domestic Segmentation Model

Tourism WA's Domestic Segmentation Model (2023) identifies Australia's full range of domestic trip types and focuses primarily on WA's current market share of each trip segment. It was built using 200 variables of data collected from 3,500 Australians in July and August 2022, resulting in data on approximately 6,500 trips, forming the model's basis.

Six types of trips were identified along with their market share, average spend, popular activities, and experiences and reasons for destination choice.

Not all segments are natural targets for the AGO region and, those that are, represent varying levels of opportunity. Some represent opportunities to attract interstate visitors, while others are more aligned with the intrastate market. It should be noted that there is a significant overlap between the segments.

This tool has been used to inform AGO's supply and demand-side decisions by identifying the destinations and/or product mix that appeals to the different segments, particularly in targeting HYTs. The marketing and product development opportunities and key infrastructure projects over 10 years for the AGO region have been aligned to each domestic trip segment, as outlined below. This demonstrates that the priority projects and opportunities for the AGO region predominantly target the Premium Nature (PN), Simple Nature (SN), Family Time (FT) and Luxe Culture (LC) segments through the mix of nature-based, luxury, family-friendly and Aboriginal tourism projects.



PREMIUM NATURE

This trip type is a premium adventure holiday in nature, exploring untouched wilderness and new experiences.

Average spend: \$332 per person per night.

The AGO region can capitalise on this trip segment through marketing and product development that align to the popular activities that define PN trips. This includes immersive nature, unique experiences and wildlife, pristine coastlines, and Aboriginal experiences.

SIMPLE NATURE

This trip type is a holiday in nature to relax, escape distraction and reconnect to the simple things.

Average spend: \$121 per person per night.

Popular elements of SN trips are unspoilt nature, road-trips, suited budget, and immersion in nature and wildlife. These are all similar elements to a PN trip, however, SN travellers are looking for a lower-budget version, with camping as a popular accommodation option. There is opportunity for the AGO region to leverage its natural assets to attract SN trips.

FAMILY TIME

This trip type is a family holiday on the coast, returning to favourite destinations and relaxing by the beach.

Average spend: \$172 per person per night.

Key elements of FT trips for the AGO region to leverage include adventure activities and immersive nature. A key characteristic of this segment is quality time and rest and relaxation, therefore promotion of assets that appeal to these characteristics has the potential to drive demand.

LUXE CULTURE

This trip type is a luxury escape staying at four or five-star hotels and resorts, focusing on restaurants, shopping and culture.

Average spend: \$230 per person per night.

To address the needs of this segment, highlighting the ease of getting around, sights and activities (with a focus on luxury elements), festivals, and luxury accommodation will be key. Improved access to the region through investment in RPT flights from interstate will attract further LC trips in the AGO region.

OPPORTUNITIES & CHALLENGES

Opportunities and challenges identified in the baseline analysis and stakeholder engagement program have informed the direction of the TDMP vision, priorities and strategies. They are summarised across supply, demand and capability.





SUPPLY

Key considerations are strengthening the existing cross-regional product and developing and packaging new and existing products and experiences, supported with appropriate resourcing and capacity building for new and emerging tourism operators. This is particularly prevalent across Aboriginal culture and heritage, dark sky, adventure, nature and trails experiences, food, wine, and agritourism product.

The planning and delivery of a broad accommodation mix that responds to subregional needs is critical. This includes niche and experiential accommodation, luxury hotels/resorts, self-contained and group accommodation. More broadly, amenity and infrastructure priorities include: improving town centre amenity; key worker housing; visitor amenities, including internet connectivity; and improving on-ground transport in the region.

There is a need to activate baseline infrastructure through dedicated programming of tours and product development, and completing 'wrap around' services, infrastructure and town centre connections to enable marketing and operational resourcing.



Opportunities

- Develop the adventure tourism market. The region holds many natural features from which to develop these experiences, in the outback, on lakes and gorges.
- Work with Traditional Owners to deliver product/experience development around the region's 'Big Rocks', including Wave Rock, Elachbutting, Burringurrah/Mount Augustus and Walga Rock, and elevate the visitor experience.
- Food and beverage provenance is an evolving trend globally. Consuming produce at or near the source and creating agritourism products highlighting seafood and liquor production would be highly marketable.
- Silo Art is growing, but there is a need to increase community-based art and sculptures to make the region come alive and be more vibrant.
- Develop geotourism experiences that align with self-drive trails and national parks, connected by access to art sites where possible.
- Mining tourism is a niche sector which could be developed, particularly around the region's historical connection with gold.
- Tap into the quirky and interesting experiences in the region, for example, Stonehenge in Esperance, or the Tin Horse Highway in Kulin.
- Explore upgrading campsites and walks in national parks and reserves. Additionally, consider upgrades to trails within Mount Augustus National Park.
- Develop recreational trails to provide experiences and activities throughout the region that can be leveraged into bookable experiences.
- Support and continue to build station/farm experiences to increase diversity in product and accommodation.
- Develop dark sky tourism experiences to support a night-time economy. Leverage the Square Kilometre Array (SKA) near Murchison through niche product development including science tourism.
- Consultation indicated wildflower experiences as a high-priority visitor experience. There is opportunity to improve visitor servicing and information provision in key wildflower viewing areas throughout the AGO region to enhance the experience.
- Develop and promote four-wheel drive hard adventure trails.
- Consistency in interpretation and way-finding is needed, including funding to implement and upgrade signage infrastructure.
- Address accommodation shortages during the high season, with caravan parks at capacity, for example, in Kalgoorlie-Boulder, where worker requirements compete with visitor needs. Addressing this constraint will significantly improve the visitor experience.
- Providing high-end 'barefoot luxury' and luxury-style accommodation is critical to attracting markets that will spend more and stay longer in the region. This could include glamping on stations/farms in the outback or sustainable, high-end pods in Esperance.
- Improve coordination between State Government to attract and facilitate private sector investment in tourism accommodation, attractions and activities.

Challenges

- Lack of depth and diversity of 'bookable' products and experiences across some subregions.
- Resourcing, including people and funds, to support experience and product development is limited.
- Provision and coordination of additional national park infrastructure, attractions and amenities. National parks and reserves in the AGO region lack the iconic built-attractions that drive visitation such as the Kalbarri Skywalk in the Australia's Coral Coast region.
- Lack of on-ground, in-region transport options, particularly at night.
- Insurance has become an industry-wide challenge with increasing and unaffordable premiums.
- Tourism investment is perceived to be high risk. Work is needed to de-risk investment by providing clear and reliable approval processes and support so that it becomes a lower-risk investment prospect, particularly given that mining and agribusiness attract the majority of investment in the region.
- There are significant challenges in attracting hospitality and tourism workers due to constraints in suitable accommodation, wage competition and the nation's lowest unemployment rate across WA.
- A lack of housing for workers has led to pressure on short-term accommodation, where mining and government workers are drawing on accommodation stock that may otherwise be used for leisure.
- Securing investment in experiences that will deliver social, economic and employment outcomes to the benefit of the local community, including Traditional Owners.
- Access is a major issue with lack of air service to Esperance and Kalgoorlie, along with the cost of flights, and limited public transport. Access is further obstructed by poor hire care provision and no one-way hire availability.
- Tourism businesses in most AGO towns are scarce and maturing. This constrains cohesion across the tourism region, with few leaders that can bring the tourism community together. The evolution of initiatives including the Murchison GeoRegion and the Station Stays network will help contribute to stronger regional collaboration and capacity building.
- Limited diversity, quality and scale of visitor accommodation limits tourism growth across the AGO region and is a limitation in encouraging tour groups to the broader region, along with a lack of larger and newer niche accommodation to add appeal and yield.
- A lack of resourcing can impede the effective management and maintenance of natural areas and cultural assets.
- There is a lack of signage identifying traditional Country names and dual naming of places to facilitate cultural connections throughout the region.



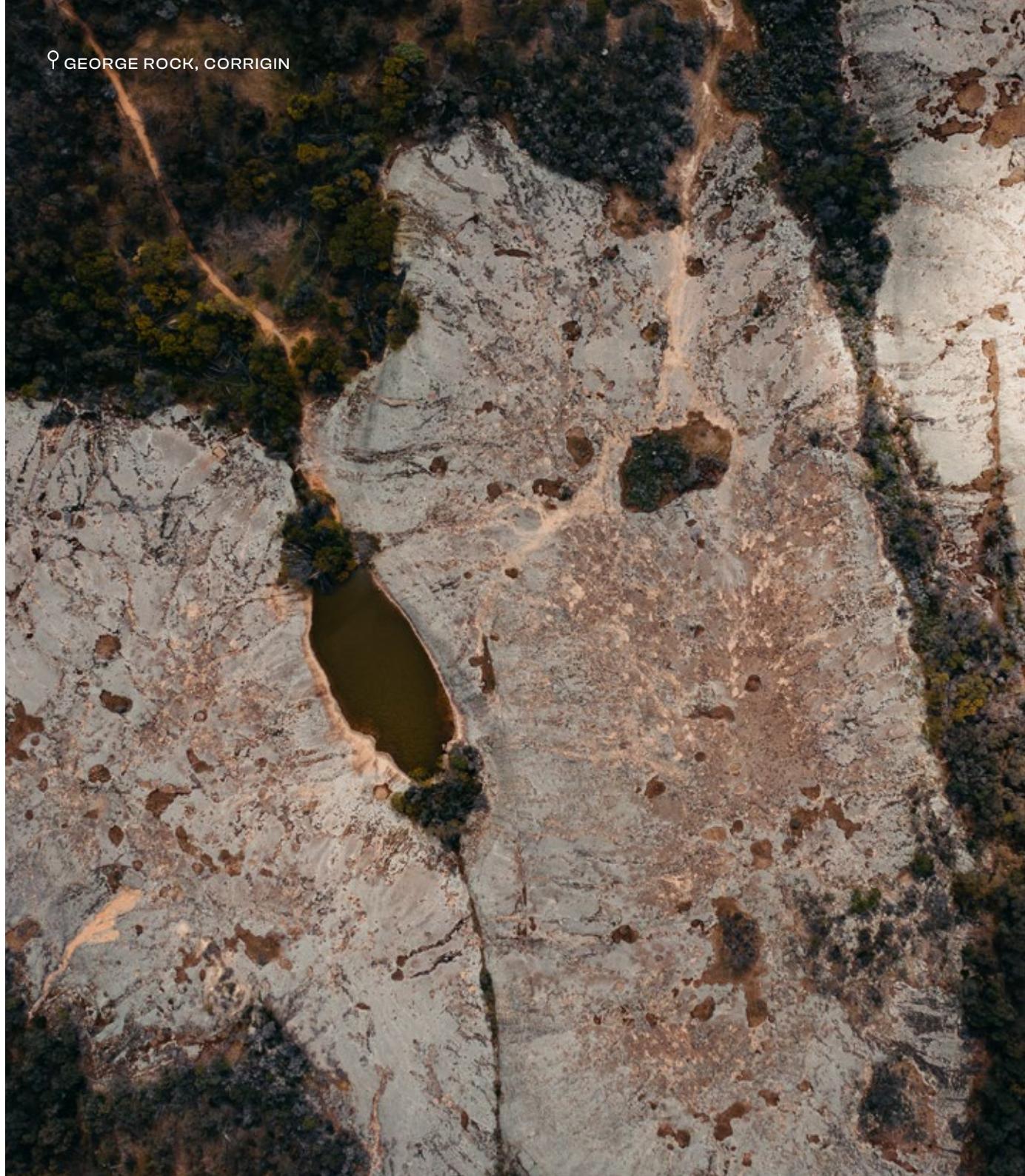
DEMAND

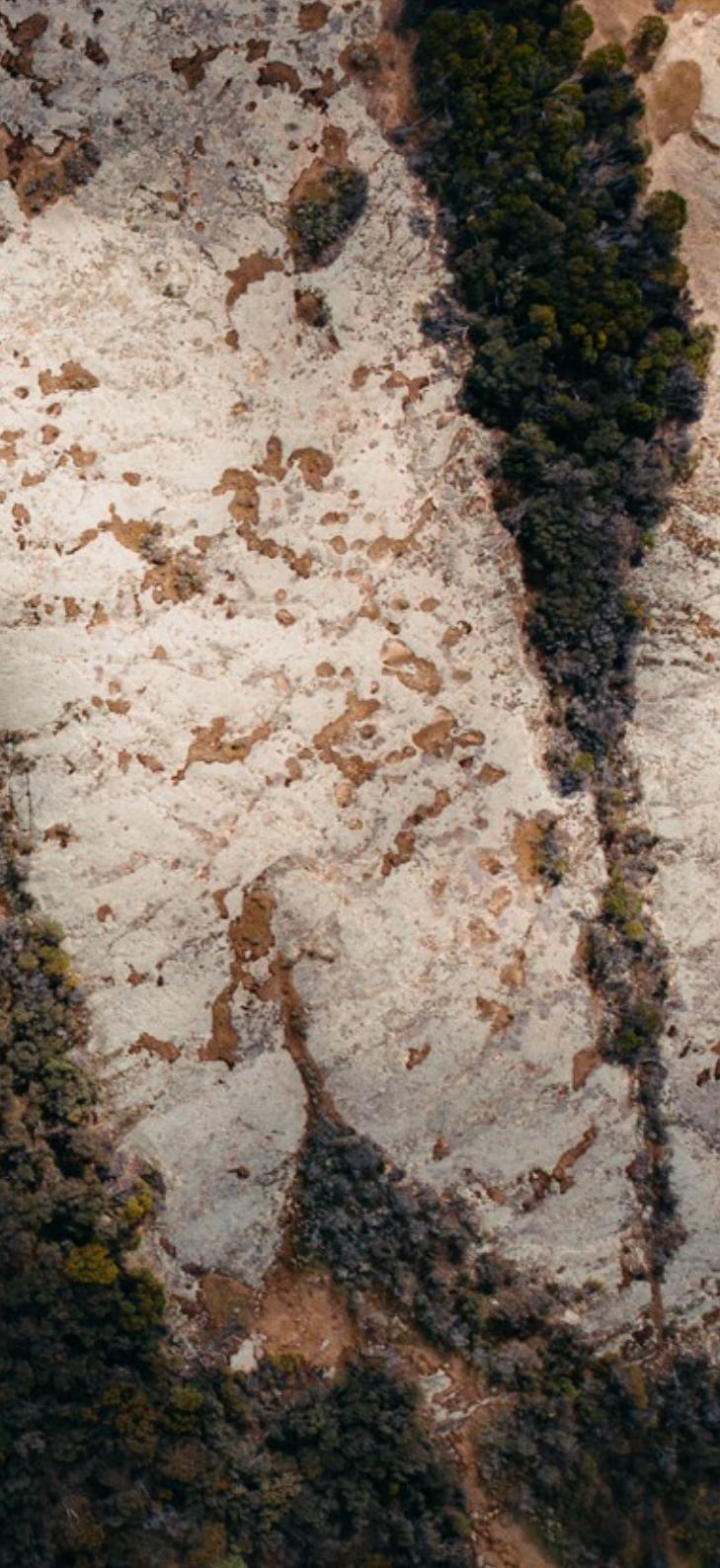
To grow tourism demand, it will be crucial to prioritise actions that encourage an integrated approach to defining markets, segmenting target audiences, and establishing a regional brand identity.

An essential aspect of supporting product development lies in implementing a 'hub and spoke' model for visitor dispersal, allowing for the exploration of both established and emerging destinations across the region.

Recognising the significant role of events in driving growth and generating demand is paramount. It is important to focus on innovative concepts that address gaps in the market, such as: culinary experiences featuring local food, wine, and produce; adventure tourism; activities during the winter and shoulder seasons; and Aboriginal cultural events.

Forging connections between tourism promotion and other industries will enable a value-added outcome that not only elevates the region's profile but also enhances the associated industries' visibility and impact.





Opportunities

- Alleviate issues associated with brand fragmentation at the subregional level, as brand propositions for some subregions are unclear.
- Develop cross-regional itineraries and opportunities to connect icons through air safaris and road journeys.
- Establish a plan to manage the potential for competing interests between subregions through investment opportunities in coordinated marketing efforts/activities.
- Ensure that customers' desires and preferences are matched with the economic potential of AGO. Accommodation and experiences must match expectations through clear messaging to avoid a damaged reputation from over-promising and under-delivering.
- Celebrate the uniqueness of place, people, and culture, aiming to attract high yield markets to the region through cohesive marketing across the AGO region.
- Invest in the growth and promotion of accredited film locations across the region in collaboration with agriculture and mining sectors.
- Develop a cross-border marketing framework to support the sealed Outback Highway initiative.

Challenges

- Lack of funding for product development and related marketing.
- The geographic span and diversity of the region can be intimidating to travellers.
- Seasonality of weather and wildflowers are intricately related to the AGO region's supply and demand.
- Visitor information needs improvement through a strategic and coordinated program of delivery. The burden on volunteer visitor servicing could be improved through better, more accurate online content.
- Poor digital infrastructure throughout remote parts of the region means that applications developed to service the market are under-used.

CAPABILITY

Growing and strengthening capability across the region's tourism 'ecosystem' currently focuses on product development support, targeted capacity building programs and improved cross-government coordination and resourcing at a state and local level.

Dedicated in-region product development support resources are needed, focusing on strategic product development (aligned with target markets), tourism and trade partnerships, event development and packaging, and subregional priorities.

Targeted capacity building programs that respond to identified subregional needs include developing a school-based and tertiary education scheme that upskills Aboriginal youth and provides aspirational pathways into tourism and hospitality careers. Additionally, there are opportunities to enhance the overall visitor experience by elevating the quality of services, and diversity and number of tourism offerings.

Building capability in customer service standards and opening hours is also critical to ensure consistency in service delivery and avoid reputational damage. Information sharing to ensure businesses understand the needs and expectations of the tourism market they are servicing will also enhance the visitor experience.

Cross-regional familiarisation programs that raise awareness, improve visitor servicing, and encourage packaging and partnerships across subregions, are also needed.

An ongoing focus on strengthening education and employment pathways and highlighting the value and impact of tourism as a career choice is a key priority, in addition to continuing to identify and respond to challenges related to workforce attraction, retention and general workforce capability.



Opportunities

- Developing capability in tourism industry marketing, product development and distribution partnerships to lift the standard of visitor experiences and increase visitation.
- Supporting operators' mental health and reducing burnout, in response to various disruptors, by engaging them with industry events.
- Supporting start-up tourism businesses will assist to further diversify tourism experiences. This could be addressed through the introduction of incubator programs.
- Local communities 'know their own backyard' and can support and enhance the provision of visitor servicing by actively promoting local experiences.
- Highlighting the value of the visitor economy to local governments and community as a positive for the region.
- Visitation to the AGO region has the potential to be expanded into other markets through improved visibility of the region in destination marketing.

Challenges

- There is a lack of reliable, high-quality telecommunications coverage in crucial nodes in the AGO region.
- Lack of current research and insights on visitor movement, preferences and activities to inform decision-making and investment attraction. In particular, there is a need to understand the motivations and travel needs of visitors undertaking the cross-regional drive routes, to identify experiences that elevate their marketing as hero routes.
- The nation-wide shortage of workers in many industries means that the region is competing with higher paying sectors to fill hospitality and tourism roles from an already small pool of available workers.
- Tourism and economic development governance within the AGO region occur within a network of competing priorities between RDCs, LGAs and the local tourism industry.

An aerial photograph of a vast, red-colored landscape, likely a dry riverbed or a coastal area. The surface is covered in small, dark green shrubs and small pools of water. The red color is a mix of orange and brown, with some darker red streaks and patterns. The overall texture is rough and uneven.

PART 4: STRATEGY & IMPLEMENTATION

PRIORITY PROJECTS

Developing tourism requires a mix of ongoing capability building, support and significant, game-changing investment. The following projects have been identified through an analysis of stakeholder engagement and desktop research as having a maximum impact on the region to develop its brand, markets and product to maximise yield and improve visitor dispersal.



OUTBACK WAY – ULURU TO LAVERTON

APPROACH

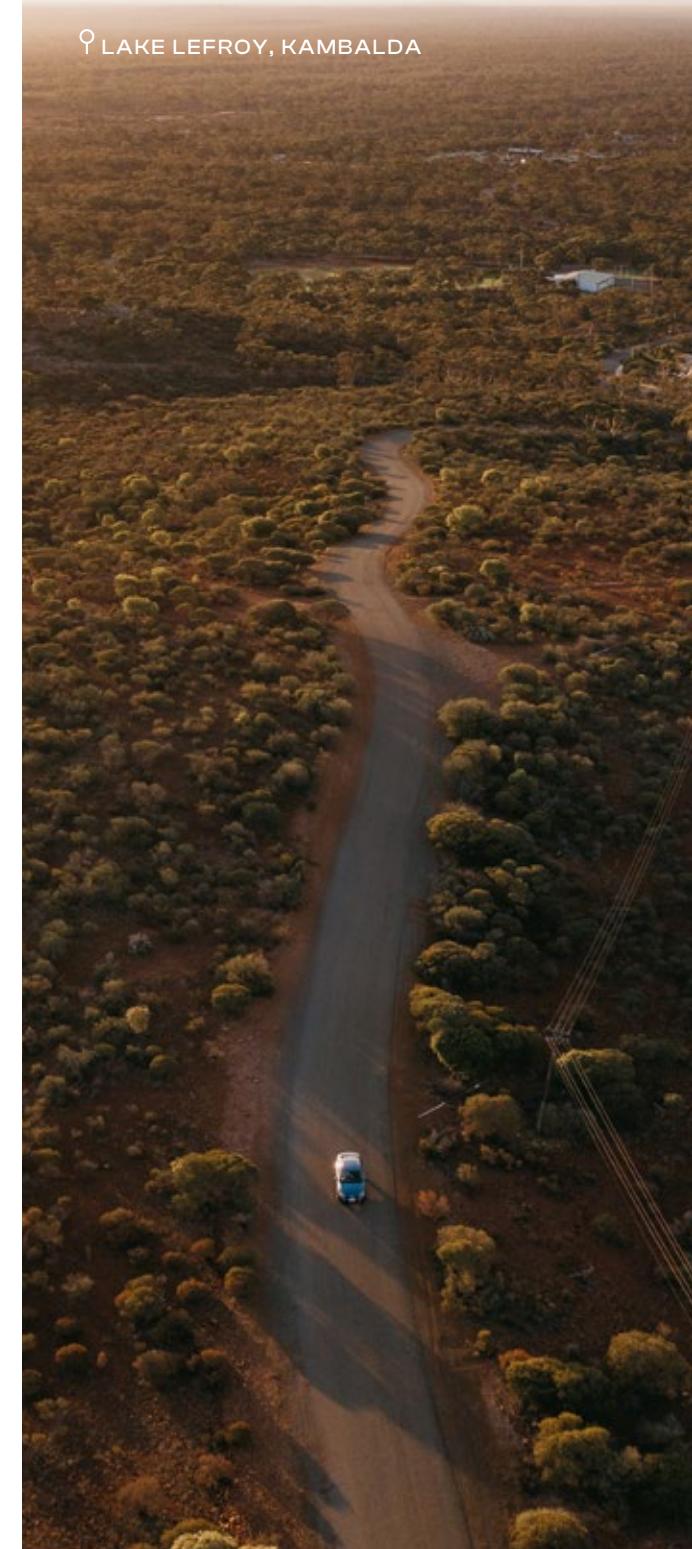
Planning for the sealing of the Outback Way needs to ensure that opportunities for the development of tourism services and infrastructure can be provided, to cater for increased commercial and leisure traffic, and to leverage investment to create an iconic tourism drive.

RATIONALE

Sealing the Outback Way creates a new interstate route into Western Australia that can be developed to become an iconic drive trail, accessible by two-wheel drives. It also provides an opportunity to connect numerous tourism drive routes that are already highly visited, within the Kalgoorlie-Goldfields subregion and beyond.

ACTIONS

- Prioritise the sealing of WA's section of the Outback Highway.
- Investigate the community and visitor servicing infrastructure and services required to manage increased commuter traffic along the WA section of the Outback Highway. Work in partnership with Traditional Owners to determine their aspirations for tourism enterprises.
- Subject to necessary business cases and needs analysis, secure public or private sector investment to realise the priority projects that will activate the drive route, such as accommodation, transport servicing and other services as identified in Outback Way Consumer Demand and Expectations Research (2022).
- Seek the development of a collaborative marketing strategy in partnership with AGO, Tourism WA, Tourism NT and TA to position the section of the Outback Way from Uluru to Laverton as one of Australia's great drive routes.



KALGOORLIE-BOULDER & ESPERANCE AIRPORT DIRECT FLIGHTS

APPROACH

Deliver infrastructure upgrades to support additional intrastate and interstate regular passenger transport (RPT) services to Kalgoorlie-Boulder, and advocate for the addition of new interstate routes that will connect Kalgoorlie-Boulder and Esperance to the east coast of Australia.

RATIONALE

Currently those flying to Kalgoorlie-Boulder and Esperance from interstate and WA regional destinations need to travel via Perth. Establishing Kalgoorlie-Boulder Airport as a regional hub for interstate and inter-regional flights, and delivering infrastructure upgrades at Esperance Airport, will create opportunities for additional direct visitation from interstate and encourage further subregional dispersal throughout the region.

ACTIONS

- Continued delivery of Kalgoorlie-Boulder Airport Masterplan 2018-2032.
- Support the upgrades proposed for Esperance Airport and initiate a strategy to improve the capacity and regularity of RPT services, including to interstate markets.
- Re-establish direct Kalgoorlie-Boulder to Adelaide flights and investigate direct flights to other interstate cities.



ACCOMMODATION INVESTMENT

APPROACH

Attract investment in short stay accommodation across the AGO region.

RATIONALE

Simple but high-quality accommodation at all levels is needed across the region's smaller towns to attract additional overnight visitors. Regional hub destinations such as Esperance and Kalgoorlie-Boulder require additional high-quality offerings to deal with capacity limitations.

ACTIONS

- Develop an accommodation investment prospectus that identifies and promotes opportunities for investment.
- Target appropriate, brand-aligned operators to invest in accommodation suited to the type of visitor experience sought by the market. This might include family units with play areas, swimming facilities, cafes and bars.
- Facilitate the development of accommodation offerings to support visitation to national parks and nature reserves.



INVESTMENT IN NATIONAL PARK INFRASTRUCTURE

APPROACH

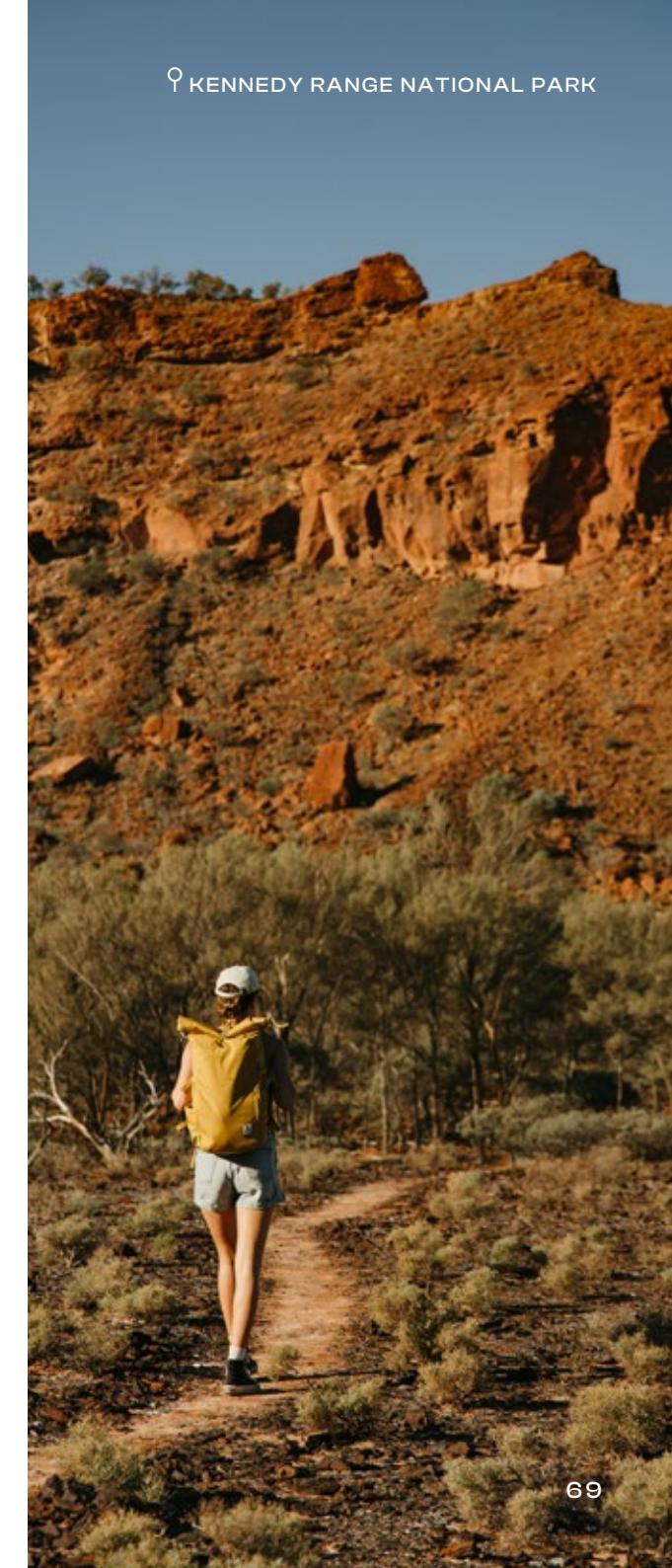
Build a coordinated, prioritised approach to investment in natural areas for effective visitor management, improved visitor experience and maximum yield and dispersal.

RATIONALE

High-quality nature-based tourism experiences will be a game changer for the AGO region. Investment in infrastructure, for example the development of a signature attraction within the conservation estate, will facilitate longer stays, disperse visitors around the region and offer opportunities for the community to further benefit from tourism.

ACTIONS

- Identify critical areas of infrastructure that could be targeted for development in the region for tourism purposes. This may include the Mount Augustus, Fitzgerald River, Cape Le Grand, Cape Arid, and Kennedy Range national parks. Ensure processes positively facilitate government and private investment on protected estate.



UPGRADE INFRASTRUCTURE IN ESPERANCE TO ENHANCE ITS COMPETITIVE POSITIONING

APPROACH

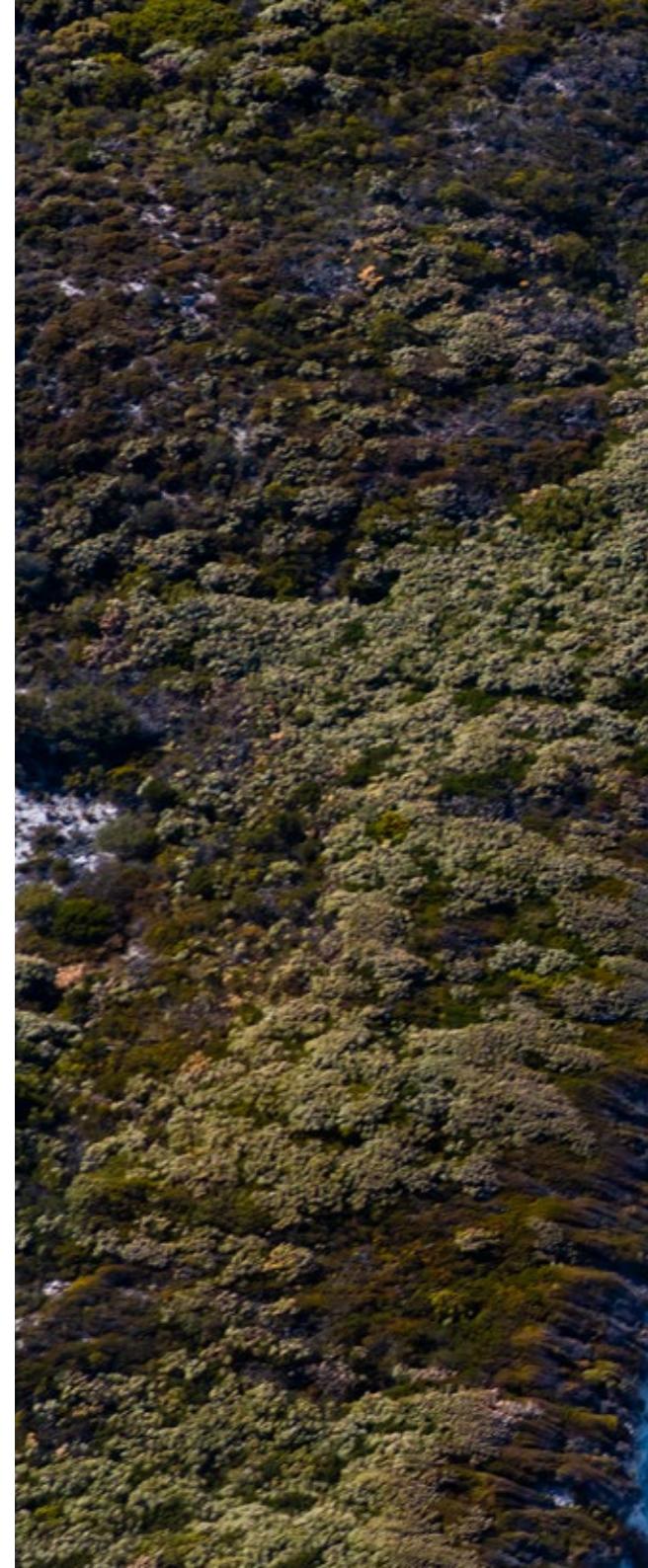
Capitalise on the growing popularity of Esperance and ensure the provision of visitor infrastructure, services, accommodation and activities meets demand, to elevate Esperance into a nationally and internationally competitive tourism destination.

RATIONALE

Esperance possesses unique natural assets and requires supporting tourism assets to be a standout destination of the AGO region and Western Australia.

ACTIONS

- Implement the James Street Cultural Precinct Development Plan (Shire of Esperance) to establish a tourism and cultural hub and improve the overall amenity and accessibility of the precinct. Focus on maximising tourism opportunities associated with the development of new infrastructure.
- Develop capability in product development and delivery to enhance the visitor experience.
- Encourage closer collaboration between state-wide and regional marketing to elevate consumer awareness of the region and increase representation in state and national campaigns.
- Explore opportunities for new accommodation developments that leverage the subregion's coastal assets.
- Develop shore-based tour products and unique experiences in Esperance and surrounds that appeal to cruise passengers.
- Promote a signature event for the Esperance and South Coast subregion to drive visitation.



AGO ACTION PLAN

The AGO TDMP Action Plan has been informed by the subregional priorities developed through industry consultation. The following tables outline actions and projects and the partner agencies/stakeholders responsible.

1. PRIORITISE INCREASES IN AVIATION, SELF-DRIVE AND CRUISE SECTOR CONNECTIONS BY GROWING CAPACITY AND INFRASTRUCTURE

INITIATIVE	PARTNERS	ACTION	SUBREGION
ADDRESSING SUPPLY ISSUES			
Deliver aviation upgrades for Esperance and Kalgoorlie-Boulder to support leisure visitation.	DoT	Improve the capacity and frequency of regular passenger transport (RPT) services into and from Esperance.	Esperance and South Coast
	SoE, GEDC, DoT, TWA, AGO	Support implementation of the upgrades proposed for Esperance Airport to increase intrastate and interstate access.	
	SoE, GEDC, DoT, TWA, AGO, Airlines	Explore the opportunity to develop an RPT service from Adelaide to Esperance.	
	CoKB, TWA, DoT	Support implementation of the Kalgoorlie-Boulder Airport Masterplan 2018–2032. Improve domestic RPT aviation access into Kalgoorlie-Boulder to leverage planned infrastructure investment (runway extension).	Kalgoorlie-Boulder and Goldfields
Pursue improvements in mobile connections in key tourism locations.	RDCs	Advocate for improved digital connectivity/mobile communication services across the region on a priority basis, to rectify gaps across the area and along major intrastate routes to improve traveller safety.	Throughout region

INITIATIVE	PARTNERS	ACTION	SUBREGION
Support the increase in road upgrades to support visitor dispersal throughout the region.	AGO	Explore the potential of one-way car rental through the region by linking one-way drive capabilities and aviation.	Throughout region
	MRWA, LGAs	Implement a subregional signage strategy to improve visitor wayfinding and interpretation.	Esperance and South Coast
	MRWA, GEDC	Support the sealing of the Outback Highway from Alice Springs to Laverton, and activate the WA section.	Kalgoorlie-Boulder and Goldfields
	TWA, AGO, GEDC	Leverage increased leisure traffic from the Outback Highway to disperse visitors throughout the subregion.	
	DBCA, MRWA	Ensure safe access to national park destinations through strategic investment in roads to key destinations, with a particular focus on highly visited parks including Kennedy Range, Cape Arid and Cape Le Grand and new parks and reserves created under Plan for Our Parks.	Throughout region
Drive the sustainable growth in cruise tourism across the region.	AGO, TWA	Encourage private sector investment into coach infrastructure to service passengers during cruise ship arrivals into Esperance.	Esperance and South Coast
	Southern Ports Authority, GEDC	Identify opportunities to develop scale-appropriate cruise and vessel berthing infrastructure in Esperance.	
ADDRESSING DEMAND ISSUES			
Support the development of an interstate marketing network.	AGO, TWA, LGAs, TA	Develop a marketing strategy in partnership with Australia's Golden Outback, Tourism WA, Tourism NT and Tourism Australia to position the Outback Way, from Uluru to Laverton, as one of Australia's great drives.	Kalgoorlie-Boulder and Goldfields
Increase awareness of tourism drive routes to encourage dispersal of visitors.	AGO, RDCs, MRWA	Investigate and support the expansion of drive tourism routes and itineraries to align with the region's recognised brand and encourage traffic dispersal.	Throughout region
		Support subregional initiatives that coordinate tourism product to create compelling itineraries that highlight subregional strengths (i.e. Murchison GeoRegion, Wheatbelt Way).	

2. GROW AND DIVERSIFY ACCOMMODATION OFFERINGS IN THE REGION

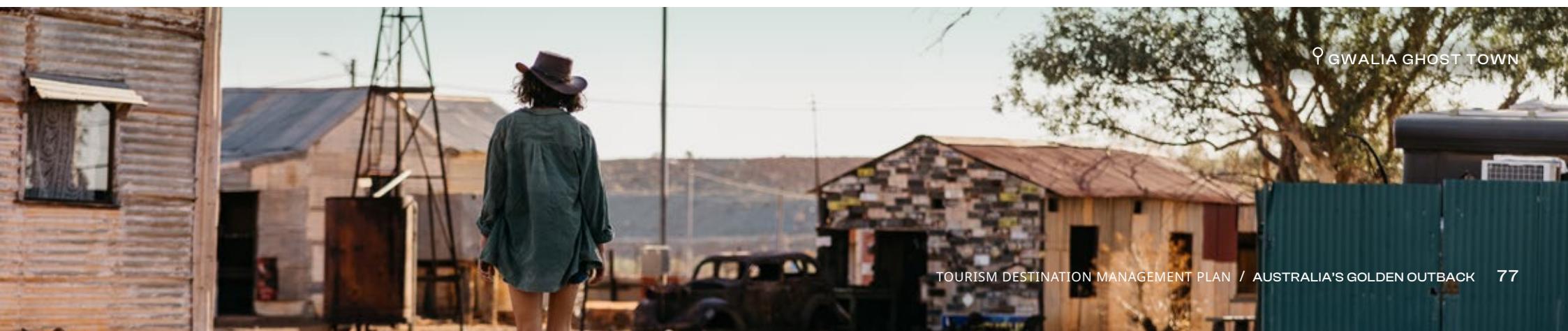
INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Grow the inventory of short stay accommodation in AGO.	AGO, RDCs, LGAs, Private sector	Identify towns in the region that require an increase in, or diversification of, tourist accommodation and encourage investment in new development that meets the needs of priority markets.	Throughout region
	AGO, RDCs, Private sector	Secure investment to develop self-contained accommodation which caters for self-drive travellers, creating a network of unique station stays across the region.	
	TWA, DBCA, TOs, LGAs, Private sector	Work with Traditional Owners and the private sector to realise the development of accommodation offerings to support visitation to national parks and reserves.	
	AGO, LGAs, GEDC, DPLH	Identify historic buildings suitable for redevelopment as short stay accommodation, and prepare an investment prospectus to promote the opportunities.	Kalgoorlie-Boulder and Goldfields
	LGAs, PS, WDC	Implement the 4WDL (Shires of Wagin, West Arthur, Williams, Woodanilling, Dumbleyung and Lake Grace) Voluntary Regional Organisation of Councils Short Stay Tourism Accommodation Plan.	The Wheatbelt
	AGO, LGAs	Increase studio and cabin-style accommodation in LGA managed caravan parks in priority towns across the region to meet the needs of self-drive leisure and short-term workforce.	Throughout region
	AGO, TWA, GEDC	In consultation with Traditional Owners, investigate suitable accommodation options along the Outback Way to cater for the increase in traffic that will be realised through sealing this road access route.	Kalgoorlie-Boulder and Goldfields
	DBCA	Maintain and upgrade campground infrastructure in coastal areas, including Cape Arid National Park.	Esperance and South Coast
	LGAs	Encourage larger accommodation projects to include on-site staff accommodation to combat a lack of regional residential housing.	Throughout region
ADDRESSING DEMAND ISSUES			
Achieve trade readiness for accommodation products.	TWA, ATEC, AGO	Work with industry to achieve trade readiness for accommodation products not currently operating in the trade distribution space.	Throughout region
ADDRESSING DEMAND ISSUES			
Promote greater consideration of tourism in formal planning processes.	TWA, LGAs, WAPC, DPLH	Advocate for tourism land use planning through existing strategic planning processes, to promote greater consideration of tourism in local and regional planning strategies.	Throughout region



3. REFRESH EXISTING AND DEVELOP NEW UNIQUE EXPERIENCES

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Investigate and deliver new tourism assets that encourage increased length of stay and regional dispersal.	AGO, NEWTRAVEL	Support the creation and promotion of recreational cycle, walk and drive trails throughout the Wheatbelt region, and invest in new hero routes that encourage visitation from Perth.	The Wheatbelt
	LGA, AGO	Develop a Great Ocean Drive masterplan to guide infrastructure development, including trails, car parks, lookouts, interpretation and beach access to position Great Ocean Drive as one of the world's great short coastal drives.	Esperance and South Coast
	LGA, TWA	Develop more bookable experiences to meet the demand of the cruise sector and improve visitor distribution of passengers around tours and activities.	
	AGO	Encourage development of new offerings to enhance station stays in the region (i.e. swag deck concept) as identified in the AGO Agritourism Development Strategy.	Throughout region
	WA Museum, GEDC, CoKB	Enhance the Museum of the Goldfields through the delivery of new experiences that showcase the Aboriginal culture, natural environment and historical significance of the region.	Kalgoorlie-Boulder and Goldfields
	DBCA, Private sector, AGO	Encourage the private sector to develop a commercial transport service between Esperance and Cape Le Grand, including Lucky Bay, allowing for easier access and return trips.	Esperance and South Coast
	SoE, TOS, DBCA	Advocate for the development of coastal infrastructure (boat ramps, beach access tracks and walking trails) to leverage the South Coast Marine Park and support visitation.	
	AGO, DPIRD, MWDC, WDC, GEDC, GDC	Establish and grow the number of paddock/ocean-to-plate businesses and build a network for the supply of local produce within the region.	Throughout region
	AGO, LGAs	Work with suppliers and hospitality businesses to improve regional dining opportunities, including developing signature dining experiences.	
	AGO, SoK	Explore opportunities to enhance the visitor experience at Wave Rock both on-site and within Hyden town, focusing on the area's outstanding formations and history, including Aboriginal history.	The Wheatbelt
	AGO, LGA, MWDC	Leverage the SKA and Murchison Radio-astronomy Observatory to develop supporting products, experiences, and interpretations that link to dark sky and geotourism themes. Support the purpose-built 'Murchison Vast Sky Experience' (with campground) as an epic dark sky experience in the AGO region.	Gascoyne Murchison
	DBCA, TWA, TOS	Investigate opportunities for iconic attractions with particular focus on the Fitzgerald River, Cape Le Grand, Mount Augustus, Cape Arid, Dryandra Woodland, and Kennedy Range national parks.	Throughout region
	AGO, DBCA, TOS, TWA, LGA	Consider upgrades to trails within Mount Augustus National Park, including additional wayfinding and information signage to improve visitor experience.	Gascoyne Murchison
	AGO, TWA, TransWA, RDCs	Explore the feasibility to introduce new carriages on the Prospector with a focus on offering a premium service level to create an experience along the entire route.	Kalgoorlie-Boulder and Goldfields

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
Addressing visitor demand issues	TOs, RDC, TWA, AGO, GEDC	In partnership with Traditional Owners, investigate the infrastructure and services required to manage increased commuter traffic along the WA section of the Outback Highway.	Kalgoorlie-Boulder and Goldfields
	DBCA	Invest in national park infrastructure to ensure quality and sustainable visitor experiences and to conserve park values, with a particular focus on Kennedy Range, Cape Arid, Cape Le Grand and Dryandra Woodland national parks.	Throughout region
		Enhance visitor experiences and understanding of natural and cultural values in national parks through improvements to interpretive information and experiences.	
ADDRESSING DEMAND ISSUES			
Support visitor dispersal initiatives.	WA Museum, TWA, DPIRD, DLGSCI	Continue to provide enhancements to, and maintenance of visitwanderland.com.au to promote visitor dispersal and increase visibility of the region's unique collection of heritage, art and cultural offerings.	Throughout region
ADDRESSING CAPABILITY ISSUES			
Support industry to build capacity and achieve trade readiness.	AGO, TWA, MWDC, GDC, GEDC, WDC	Support capacity building/mentoring programs for station stay operators to encourage the development of new bookable experiences (e.g., agritourism, dark sky), enhance market presence, and increase length of stay.	Throughout region
	AGO, TWA, NEWTRAVEL	Explore opportunities to deliver tourism niche workshops within the Wheatbelt to foster the creation of new tourism product, including agritourism and dark sky tourism.	The Wheatbelt
Establish Esperance as a nationally and internationally competitive destination.	AGO, GEDC, SoE	Facilitate industry collaboration and consultation to develop capability in product development and delivery. Enhance the standard of visitor experience through active support of new tourism and hospitality ventures in Esperance.	Esperance and South Coast
Work with TOs interested in engaging in tourism.	WAITOC, MWDC, GDC, GEDC, WDC, TWA, TOs	Support Traditional Owners in delivering their aspirations for tourism enterprises.	Throughout region



4. DEVELOP, GROW AND SHOWCASE ABORIGINAL CULTURAL TOURISM

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Develop Aboriginal tourism products and experiences across the region.	AGO, MWDC, DBCA, WYAC, WAITOC	Develop an Aboriginal tourism experience at Walga Rock in partnership with Wajarri Yamatji Aboriginal Corporation and DBCA.	Gascoyne Murchison
	SoN, AGO, GEDC	Support implementation of the Warburton Civic Precinct Master Plan (Warburton Gallery and Entry Concept Plan 2022).	Kalgoorlie-Boulder and Goldfields
	WAITOC, TOs, ACs, GEDC	In alignment with identified aspirations and future programs, work with Aboriginal Corporations to facilitate tourism business development.	Throughout region
	LGA, WAITOC, TOs	Investigate and deliver opportunities for authentic Aboriginal tourism experiences and interpretation, to align with the proposed walk and bike trail identified in the draft Shire of Dumbleyung Destination Development Plan 2022.	The Wheatbelt
ADDRESSING DEMAND ISSUES			
Address key audience interests through targeted marketing for Aboriginal tourism experiences.	AGO, OHDC, LGAs, GEDC, VCs	Integrate communications and marketing of Aboriginal tourism experiences and Aboriginal art centres/galleries with sealing of Outback Way.	Kalgoorlie-Boulder and Goldfields
ADDRESSING CAPABILITY ISSUES			
Increase Aboriginal tourism training and employment opportunities.	AGO, TWA, WAITOC	Develop initiatives and programs to encourage Aboriginal people to consider participation and careers in tourism and hospitality throughout the region. Facilitate collaborations for Aboriginal people to work with mainstream tour operators in a consultative role or through direct employment to deliver cultural content.	Throughout region
	TWA, WAITOC, AGO	Implement the Jina Plan in relation to Aboriginal tourism workforce initiatives.	

5. BUILD UPON THE AGO BRAND ASSETS

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING DEMAND ISSUES			
Develop brand stories and dispersal initiatives.	AGO, SOE, Industry	Implement and leverage the new Esperance tourism brand to strengthen the destination's image, appeal to high-yield travellers, and encourage sustainable tourism.	Esperance and South Coast
	AGO, ASW, TWA	Amplify promotion of the South West Edge brand, to encourage visitor dispersal from ASW to AGO.	
	AGO, TWA, TA	Encourage closer collaboration between state and regional marketing to elevate visitor knowledge of the region and increase representation in state and national campaigns.	
	AGO, TWA	Ensure collaborative marketing efforts align with and amplify the Tourism WA global brand.	Throughout region
	AGO, TWA	Continue to market road-trips, whilst highlighting the region's unique and diverse experiences, to further establish the AGO region as the premium destination for road-tripping in WA.	

6. CREATE AND USE UNIQUE EVENTS TO PROMOTE CROSS-REGIONAL TRAVEL

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Grow the AGO calendar of events.	LGAs, AGO	Support the development of a significant event to showcase subregional strengths and grow shoulder season demand.	Esperance and South Coast
	TWA, AGO	Grow a schedule of niche events (i.e. Outback Rodeos, Kulin Bush Races, St Barbara's Day Parade and regional music festivals such as Wave Rock Weekender).	
		Develop a portfolio of events across the year to encourage inter-regional and intrastate travel.	
	AGO, TWA	Explore the opportunity to establish a food and beverage event that highlights the AGO region's unique agricultural assets and connects travellers to agritourism experiences.	Throughout region
ADDRESSING DEMAND ISSUES			
Assess event marketing communications to maximise awareness and visitation.	TWA, Industry	Optimise event branding to align with Tourism WA initiatives, whenever feasible.	Throughout region

7. IMPROVE THE CAPACITY AND CAPABILITY OF THE TOURISM SECTOR TO ENSURE ITS SUSTAINABILITY

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING DEMAND ISSUES			
Maximise awareness of tourism and hospitality as employment options.	TWA, AGO	<p>Raise awareness of Jobs WA website as the main portal for tourism and hospitality jobs.</p> <p>Develop targeted campaigns towards seasonal work opportunities with backpackers/travellers.</p>	Throughout region
ADDRESSING CAPABILITY ISSUES			
Implement Tourism WA workforce development strategies.	TWA, DTWD	<p>Support and facilitate training and development opportunities across the region to increase the pool of tourism workers:</p> <ul style="list-style-type: none"> Seek a closer connection to the regional workforce through tourism and hospitality job portals, programs, incentives and campaigns. Support industry involvement in raising the profile of career opportunities in tourism. Develop recognised pathways to support career opportunities in tourism. Position Aboriginal tourism as a viable employment avenue. 	Throughout region
	AGO, TWA	Instigate a mentoring program for accommodation and tour operators to increase marketplace presence and grow trade distribution.	
	TWA, AGO, LGAs, ROCs, LTOs	Undertake visitor experience workshops with industry and ROCs to improve existing visitor experiences and develop new opportunities identified by industry and LGAs.	
	TCWA, TWA	Increase the number of tourism businesses with accessible tourism accreditation by: <ul style="list-style-type: none"> Educating the industry on the increasing importance of accessible and inclusive tourism; and Providing resources to assist industry to meet the needs of accessible markets. 	
	AGO, LGAs	Explore the opportunity to establish a new role based in the Wheatbelt that works under the AGO RTO, specifically focusing on driving tourism development, elevating the value of tourism and facilitating collaboration between key Wheatbelt stakeholders.	The Wheatbelt
	LGAs, ROCs, AGO	Consider a collaborative approach to utilise the existing workforce within LGAs, including sharing resources and rostering opening hours for businesses to ensure tourism services are delivered.	
Grow awareness and market presence of high quality tourism products.	TWA, TCWA	Promote high quality visitor experiences, and encourage enhancements in business quality/sustainability through the Dream Collective recognition program.	Throughout region
	TWA, Industry	Assist trade ready operators to establish in-market relationships, attend trade events and strengthen WA's market presence through the Trade Ready Introduction Program (TRIP).	

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