Northern Growth Alliance
Tourism Strategy

GOVERNMENT OF
WESTERN AUSTRALIA

Wheatbelt
Development
Commission

Supported by Royalties for Regions

Draft Report to
Northern Growth Alliance
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Abbreviations

ABS .... Australian Bureau of Statistics

ALG .... Arts Leadership Group

ASCOT .... Australian Standard Committee in Tourism

ASGS .... Australian Statistical Geography Standard

CAPI .... Computer Assisted Personal Interviewing

CC .... Coral Coast

CRC .... Community Resource Centre

DBCA .... Department of Biodiversity, Conservation and Attractions

DCA .... Department of Culture and Arts

DIAC .... Department of Immigration & Citizenship

DINKS .... Double income no kids

DLGSCI .... Department of Local Government, Sport and Cultural Industries

EXP .... Experience Perth

FTE .... Full Time Equivalent

IVS .... International Visitor Survey

LGAs .... Local Government Areas

LTO .... Local Tourism Organisation

MICE .... Meetings, incentives, conferences and events

NGA .... Northern Growth Alliance

NVS .... National Visitor Survey

RCDP .... Regional Centres Development Plan

RDA .... Regional Development Australia

RDC .... Regional Development Commission

REDS .... Regional Economic Development Scheme

RTO .... Regional Tourism Organisation

SBDC .... Small Business Development Commission

SINKS .... Single income no kids

SPS .... The Government of Western Australia's 'State Planning Strategy 2050'

SWOT .... Strengths, weaknesses, opportunities, and threats analysis

TA .... Tourism Australia

TRA .... Tourism Research Australia

TSA .... Tourism Satellite Account

TWA .... Tourism WA

UK .... United Kingdom

UNWTD .... United Nations World Tourism Organisation

VC .... Visitor Centre

VFR .... Visiting Friends and Relatives

WACRN .... The Western Australian Community Resource Network

WAITOC .... Western Australian Indigenous Tourism Operators Council

WDC .... Wheatbelt Development Commission
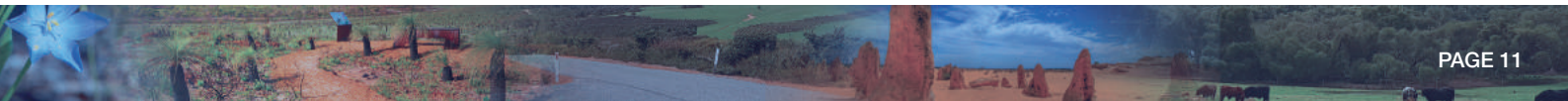
Section 1

Executive Summary

Section 1 – Executive Summary

Economic Transitions has been engaged by the Wheatbelt Development Commission (WDC) to develop a tourism strategy for the Northern Growth Alliance (Alliance), comprising the Shires of Chittering, Dandaragan and Gingin. Flametree Creative assisted with the branding development.

To achieve outcomes for the project tasks, a concurrent mixed methods approach was conducted where both the qualitative and quantitative data were collected and analysed simultaneously.   The project commenced with the review and analysis of secondary data including key federal, state, local and region government, tourism and associated industry agencies. Primary data was then collected through perception based semi-structured interviews with key stakeholders, and community participation workshops for both tourism project and branding development.

Tourism Opportunity – Action and Project Summary

Feedback from stakeholder interviews and workshops has been reviewed and key actions and projects have been identified for each of the Shires of Chittering, Dandaragan and Gingin, as well as the Alliance. The recommendation for implementation of the key actions and projects will be determined by the Shires and Alliance with the support of the WDC at a future date.

Shire of Chittering

Table 1. Shire of Chittering, Tourism Potential, Short Term Actions and Projects.

Short Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Action	Seek support from tour bus companies for additional coaches to the Shire of Chittering	N/A	Shire and key agencies to collaborate with tour bus companies to increase number of coaches to the Shire, including visits to vineyards and key tourist attractions.	Shire of Chittering - Economic Development Strategy	Immediate – 19/20 contracting year currently being negotiated	Nil
Action	Implementation of overarching governance structure	N/A	To promote and advocate tourism to the NGA region, represent on advocacy issues, and provide a high level of support for the tourism industry across the Shires.	WDC	6 – 12 months	To be determined
Action	Networking for partnerships and collaboration	N/A	Networking or online forum for social exchange and to impart information on future events to avoid the possibility of duplicity or conflict of dates, opportunity for collaboration and co-operation, and discussion of tourism related trends impacting on the Shires.	Alliance Shires, WDC, Chittering Visitor Centre Strategic Plan	6 – 12 months	Nil
Action	Tourism statistical reliability	N/A	Align tourism statistical data collection with those from TRA to obtain both reliable and valid statistics.	TRA	6 – 12 months	Nil
Project/ Action	Collaboration for accommodation providers	Accommodation	Develop an accommodation network and registration through the Chittering VC which lists all accommodation in the Shire, including AirBnB.	Chittering Visitor Centre Strategic Plan, Shire of Chittering – Strategic Community Plan	6 – 12 months	Nil

Table 2. Shire of Chittering, Tourism Potential, Medium Term Actions and Projects.

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Indigenous content	Indigenous	Incorporate Indigenous tourism content to supplement the current tourism offering; support from Margaret Drayton for historical and anthropological interpretation.	Tourism 2020, State Planning Strategy 2050, State Government Strategy for Tourism in WA 2020, DCA, TWA Heritage Tourism Strategy Shire of Chittering – Economic Development Strategy	1 – 2 years	$20,000
Project	Festivals/ Events	Festivals/ Events	Develop additional festivals and events to support the Taste of Chittering event for annual planner, including country music and farmers markets.	State Planning Strategy 2050, TWA – Taste 2020, WDC, Shire of Chittering – Economic Development Strategy & Strategic Community Plan	1 – 2 years	$20,000 per event with support from Regional Events Scheme
Project	Nature Play	Adventure Tourism Eco-tourism	Develop an event to encourage kids to explore nature.	State Planning Strategy 2050, State Government Strategy for Tourism in WA 2020, DLGSCI	1 – 2 years	Up to $15,000 per event

Table 3.   Shire of Chittering, Tourism Potential, Long Term Actions and Projects.

Long Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Explore adventure tourism opportunities	Adventure	Determine feasibility of adventure tourism opportunities: • Flying fox, • BMX/ Motocross, • Billycart rally (Crest Hill Road), • Super challenge, • Mountain bikes, • Snow sports, • Kayak- turtle man, • Scenic flights- ultra lights, • Ballooning, • Hovercraft, • Horse riding.	State Planning Strategy 2050, Shire of Chittering – Economic Development Strategy, Mountain Bike Trails Master Plan	2 – 3 years	$20,000
Project	Ecotourism	Ecotourism	Support development of guided and self-guided tours: • Lake tours, • Wildlife centre (CWC) in Julimar, • Expansion of school groups, • Nocturnal tours/ day tours, • Citizen science projects.	Shire of Chittering – Strategic Community Plan	2 – 3 years	$25,000
Project	Develop Farmgate and food producers co-op	Agriculture Culinary Tourism	Identify and develop an outlet for farmgate and food producers' co-op for local producers including crafts and wine.	TWA - Taste 2020	3 – 5 years	$40,000
Project	Development of a Wellness retreat	Wellness/ Medical	Identify potential sites for wellness and medical retreat.	State Planning Strategy 2050	3 – 5 years	$40,000 Potential for private investment.
Project	Explore accommodation options	Accommodation/ Eco retreats/ Glamping tents	Identify potential sites for eco accommodation and glamping tents and feasibility of development.	Tourism 2020, State Planning Strategy 2050	3 – 5 years	$40,000. Potential for private investment.

Shire of Dandaragan

Table 4. Shire of Dandaragan, Tourism Potential, Short Term Actions and Projects.

Short Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Action	Seek support from tour bus companies for additional coaches to the Jurien Bay	N/A	Shire and key agencies to collaborate with tour bus companies to increase number of coaches to stop in Jurien Bay when visiting the Pinnacles.	State Government Strategy for Tourism in WA 2020	Immediate – 19/20 contracting year currently being negotiated	Nil
Action	Collaboration for accommodation providers	N/A	Develop an accommodation network and registration TC through the VC which lists all accommodation in the Shire, including AirBnB.	Shire of Dandaragan – Community Development Plan & Local Tourism Planning Strategy	6 – 12 months	Nil
Project	Develop 'day tours' to enhance the day tour and coach tour market to the Shire	N/A	Develop an array of tours which could capture varying markets: • Wildflowers, • Farm Stay, • Windfarm, • Wine, • Farm Tours, • Stargazing nights at Aggies or Yallalie crater.	Shire of Dandaragan – Local Tourism Planning Strategy	6 – 12 months	Nil
Action	Marketing and communication	N/A	Develop a marketing and communication strategy which incorporates all activities in the Shire and is on all social media platforms.	RDA Wheatbelt Regional Plan 2013 - 2018	6 – 12 months	Nil
Action	Signage audit	N/A	Missing signs for Sandy Cape, Jurien Bay distance markers from Brand Highway to Indian Ocean Drive.		6 – 12 months	$25,000
Action	Provide information at Information Bay at Jurien East Road from Brand Highway (coach stop)	N/A	Currently no information at the information bay at the coach stop at Jurien East Road Road. Develop an appropriate sign consistent with Shire bays.		6 – 12 months	$20,000

Table 5. Shire of Dandaragan, Tourism Potential, Medium Term Actions and Projects.

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Develop apps for current brochures	N/A	Various brochures providing information on trails can be developed in to apps ie. shipwreck coast, diving trail.		1 – 2 years	$50,000
Project	Develop farm tours which provide an educational forum for children and adults.	Agritourism	Develop an array of tours which could capture varying markets: • Shearing, • Damper, • Working dogs, • Fruit picking, • Camel milking, • Lamb feeding, • Camp fires, • Berry farms, • Olive press.	State Planning Strategy 2050, TWA – Taste 2020 Shire of Dandaragan – Corporate Business Plan & Strategic Community Plan	1 – 2 years	Private investment from appropriate industry partners
Project	Develop the Shire as an educational facility where short courses could be conducted to attract visitors.	Educational	• Distilling/ essential oils, • Farming/ horticulture, • Environment , • Science, • Heritage, • Night sky, • Geo tourism, • Renewable energy.	State Planning Strategy 2050, Shire of Dandaragan – Corporate Business Plan & Strategic Community Plan	1 – 2 years	Partner with education providers and private businesses
Project	Develop wellness and medicine tours and stays.	Wellness and Medicine	• Soul healing through nature, • Get people to live in country, • Wellness pamper weekend, (yoga, beauty etc) • Health retreat, • Yoga, • Gils/ aromatherapy, • Detox.	State Planning Strategy 2050	1 – 2 years	Partner with private businesses

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Develop culinary tours and agritourism.	Culinary Tourism Agritourism	Capitalising on fresh produce: • Paddock to plate with local produce, • Markets, • Restaurants, • Tours.	TWA – Taste 2020	1 – 2 years	Provide assistance to local businesses
Project	Develop major events for day trippers and overnighters	Festivals/ Events	• Festival of nature, • Dandaragan 100- cycling, • Continue with Opera in the Pinnacles, • Source additional opportunities such as Roman Rudnytsky (pianist), • Wild harvest festivals.	State Planning Strategy 2050, TWA – Taste 2020,	1 – 2 years	Seek support (financial etc) of various agencies to assist in the co-ordination of events
Project	Develop eco trails	Ecotourism	Develop additional trails to support current trails, ie red gums.	State Planning Strategy 2050,	1 – 2 years	Nil
Project	Proceed with excavation work and trail development	Military heritage	• Support the continuation of excavation and heritage works at North Head Radar Station 48. Development of a military heritage trail with low impact carrying capacity linking the coast with the hinterland.	State Planning Strategy 2050, TWA – Heritage Tourism Strategy	1 – 2 years	$50,000
Project	Completion of the Turquoise Way Path	Sport Tourism	Seek funding and complete Stage 2 comprising 14.5kms from Hill River to Cervantes completing the Turquoise Way Path from Jurien Bay.	State Planning Strategy 2050, Shire of Dandaragan – Local Tourism Planning Strategy	1 – 2 years	$2.5M

Table 6. Shire of Dandaragan, Tourism Potential, Long Term Actions and Projects.

Long Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Develop virtual and augmented reality	Technology	• Virtual skydive, • Heritage, • Mining, • Windfarm, • Astro.		2 – 5 years	$50,000
Project	Develop additional accommodation	Accommodation	Seek private investment in establishing a glamping industry.	Tourism 2020, State Planning Strategy 2050, WDC – Central Midlands Sub-regional Economic Strategy, Shire of Dandaragan Local Tourism Planning Strategy	2 – 5 years	$250,000
Project	Develop educational tours on farms.	Agritourism/ Education	• Museum/ display machinery, • Traditional craftsman such as blacksmith, horse shoeing, • Culinary ie. milk cow, butter, damper.	TWA – Taste 2020	2 – 5 years	Provide assistance to local businesses to support
Project	Building of solar panel renewable energy plant in iconic shape	N/A	Develop the next solar panel renewable energy plant in the shape of iconic flora or fauna which can be viewed from a platform or overhead when flying.		3 – 5 years	Various energy companies.
Project	App with recordings/ aboriginal story telling of different pin points within the Shire.	Indigenous/ Technology	Develop story-telling of Aboriginal historical information	State Planning Strategy 2050, State Government Strategy for Tourism in WA 2020, DCA, Jurien Bay Growth Plan	2 – 5 years	$40,000
Project	Introduction of cruise ships as an alternative destination/port	Cruise	Seek support of the cruise ship industry to dock at Jurien Bay for day trips to Jurien, Cervantes, Pinnacles, Caves, trails.	State Planning Strategy 2050, Shire of Dandaragan – Local Tourism Planning Strategy	2 – 5 years	Seek support of Department of Transport and Tourism WA
Project	Development of tourism at Wedge and Grey	Cultural tourism Indigenous tourism Eco-tourism	In consultation with appropriate departments, consideration for feasibility and development of cultural, Indigenous and eco-tourism.	State Planning Strategy 2050, DCA, DBCA, TWA – Heritage Tourism Strategy,		

Shire of Gingin

Table 7. Shire of Gingin, Tourism Potential, Short Term Actions and Projects.

			Short Term Actions and Projects			
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Develop farm experiences and tours; promote self-drive.	Agritourism Astrotourism Culinary Tourism	• Farm stay to experience, • Shearing, • Sheep, • Alpacas, • Milking cows, • Horse riding, • Chickens: • Collect eggs • Ducks, • Quad biking, • Learn to drive a tractor, • Pick your own fruit and/or vegetables, • From seed to table: • Blueberry farm, • Citrus, • Vegetables. • Long table lunch or BBQ, • Stargazing, • Camp fire music.	State Planning Strategy 2050, TWA – Taste 2020	Up to 12 months	Seek private businesses to invest, and provide support.
Action	Business Promotion	N/A	Provide support for any tourism business to be promoted through the VC's, and CRC's.		Up to 12 months	Nil
Action	Fast track business	N/A	Provide support to small and medium businesses to fast track approvals process.	Tourism 2020	Up to 12 months	Nil
Action	Set up and assistance for small business	N/A	Assistance for small business to establish themselves in the market.	Tourism 2020	Up to 12 months	Nil
Action	Encourage tourism to Gingin	N/A	Work with other VC's and agencies to promote tourism to the Shire.	WDC	Up to 12 months	Nil
Action	Seek support from tour bus companies for additional coaches to the Shire of Gingin	N/A	Shire and key agencies to collaborate with tour bus companies to increase number of coaches to the Shire, including visits for agritourism.	State Government Strategy for Tourism in WA 2020	Up to 12 months	Nil
Action	Signage at Guilderton Visitor Centre	N/A	Erect signage at Guilderton VC to inform visitors to the facility.		6 – 12 months	$5,000

Table 8. Shire of Dandaragan, Tourism Potential, Medium Term Actions and Projects.

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Small business development office/ officer	N/A	Seek support of the SBDC to introduce an office/officer to the Shire to support new and small business development.		1 to 2 years	tba
Project	Provide public transport	N/A	Seek support of Department of Transport to develop a public transport route from link, or linkages from main towns including Wanneroo and Ellen Brook.	State Government Strategy for Tourism in WA 2020	1 to 2 years	tba
Project	Food trails	Culinary Agritourism	Develop food trails through the Shire which support the agricultural industry.	TWA – Taste 2020	1 to 2 years	$50,000

Table 9. Shire of Gingin, Tourism Potential, Long Term Actions and Projects.

Long Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Bike trails	Ecotourism	Develop bike trails throughout the Shire.	State Planning Strategy 2050,	2 to 5 years	$60,000

Northern Growth Alliance

Projects including more than one Shire in the Alliance.

Table 10. Northern Growth Alliance, Tourism Potential, Short Term Actions and Projects.

Short Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Brand development		Further consultation and development of branding for the Alliance from current brand development.		Up to 12 months	$2,500

Table 11. Northern Growth Alliance, Tourism Potential, Medium Term Actions and Projects.

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Military Trails	Military/ Heritage Tourism	Development of military trails through the Shires of Dandaragan and Gingin exploring the military camps from WWII, including military archaeology and site interpretation.	State Planning Strategy 2050, TWA – Heritage Tourism Strategy,	1 – 2 years	$60,000
Project	Seafood Tourist Trail	Culinary Tourism	Inclusion into the Seafood Tourist Trail as proposed by the WA Fishing Industry Council.	Tourism 2020, State Planning Strategy 2050, TWA – Taste 2020	1 – 2 years	Nil
Project	Shipwreck Trail	Marine Tourism	Based on the Shipwrecks of the Coast, development of a trail which provides boaties and land dwellers interpretation on shipwrecks along the coast.	State Planning Strategy 2050, TWA – Heritage Tourism Strategy	1 – 2 years	$60,000

Table 12. Northern Growth Alliance, Tourism Potential, Short Term Actions and Projects.

Long Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Moore Food Trail	Culinary Tourism	Development of a culinary/ food trail through the Shires for visitors to explore the regions 'food bowl'.	State Planning Strategy 2050, TWA – Taste 2020	2 – 5 years	$80,000
Project	Moore Heritage Trail	Heritage Tourism	Development of a heritage trail through the Shires based on heritage sites which are available for public viewing (Appendix 3).	State Planning Strategy 2050, TWA – Heritage Tourism Strategy	2 – 5 years	$250,000

Three brand concepts are provided:

Image 1. Brand Concept 1.

Image 2. Brand Concept 2.

Image 3. Brand Concept 3.
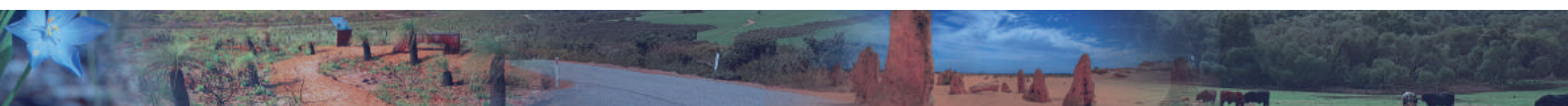
Section 2

Introduction

Section 2 – Introduction

In December 2017, Economic Transitions was engaged by the WDC for the Northern Growth Alliance to deliver a tourism plan for the Alliance, comprising the Shires of Chittering, Dandaragan and Gingin. To deliver the three key themes identified in the scope, Economic Transitions collaborated with Flametree Creative to deliver branding.

Northern Growth Alliance

The Northern Growth Alliance (NGA) comprises the Shires of Chittering, Dandaragan and Gingin, located in the Wheatbelt of Western Australia. The NGA was established as a sub-region in Wheatbelt Development Commission (WDC) planning due to their similar economic bases and growth projections.

The NGA geographically extends across an area of approximately 11,155km^2, and is located within a 2 hour drive to the north of Western Australia's capital, Perth. The area is accessible via the main roadways from Perth: through the Shire of Chittering via the Great Northern Highway, and the Shires of Gingin and Dandaragan via the Brand Highway and Indian Ocean Drive. Each of these main highways extends through to the north of Western Australia, providing tourists with an opportunity of visiting many unique Shire tourism assets and attractions on their journey.

Image 4.   Geographical Location of the Northern Growth Alliance.

The key tourism agencies for the region are Experience Perth, encompassing the Shires of Chittering and Gingin, and Australia's Coral Coast which includes the Shire of Dandaragan.

Development of the Tourism Strategy

The project has been funded by the Wheatbelt Development Commission, Community Chest Funding and included a number of key outcomes:

- Background of the Northern Growth Alliance area including visitation and statistics, target markets and future of tourism in the region

- Stocktake of existing assets, service provision, marketing and branding,

- Projects identified for existing assets and potential development including prioritisation to determine what is important and easily achievable,

- Gaps analysis in the tourism offering.

Section 3

Project Methodology

Section 3 – Project Methodology

More recently, it has become well documented that a mixed methods approach in tourism provides the most suitable model for best understanding the sample population (Pansiri, 2005 & 2006, Jennings, 2010). The complementarity of the qualitative and quantitative methods is used to measure the overlapping but different facets of a phenomenon, providing more rigorous, accurate, valid and reliable data than one method alone.

The time-frame for the Project dictated the data collection design. A concurrent mixed methods design was conducted (Figure 1) where the qualitative and quantitative data were collected and analysed simultaneously with equal weighting allocated to the data collected from each design method (QUAL + QUANT). The data was analysed once all research methodology had been completed.

Figure 1. Qualitative and Quantitative Research.

Qualitative Research	Quantitative Research
Perception based semi-structured interviews with key stakeholders	Data collection from Tourism Research Australia providing domestic day, national and international visitor capture
Community participation workshops	

Secondary data was sourced from reports made available by the Shires of Chittering, Gingin and Dandaragan, publicly available trade publications and various tourism organisation reports, statistics from the Australian Bureau of Statistics and Tourism Research Australia, and various academic publications.

Primary data was collected through perception based semi-structured interviews with key stakeholders, and community participation workshops.

The success of any regional development or destination is primarily dependent on the support of the local community. A sustainable approach to tourism envisages the people being empowered by owning their culture as part of any tourism development (Singh in Ghosh, Siddique and Gabbay, 2003, 34). Since tourism relies comprehensively upon the goodwill of the local residents, their support is essential for its development, successful operation, and sustainability (Jurowski, 1994). A community participation approach was applied in the development of a strategic tourism plan for the NGA. It ensures the community engages in the process of its development, locally held knowledge is shared, and commonly perceived problems and widely accepted solutions are discovered via collaboration (Okazaki, 2008).

The overall socio-economic development of the community has been considered as the predominant factor in considering the feasibility and sustainability of tourism projects (Okazaki, 2008).   This approach also encourages consideration of diversification and a process of community engagement and participation, or a bottom-up approach (Schianetz & Kavanagh, 2008).

Section 4

Desktop Review of Current Tourism Information, Materials and Strategies Impacting on Tourism Development in the Northern Growth Alliance

Section 4 – Desktop Review of Current Tourism Information, Materials and Strategies Impacting on Tourism Development in the Northern Growth Alliance

The structure of tourism in Australia comprises a layered approach (Figure 2) with Tourism Australia providing an overarching structure at the Federal level, Tourism WA at the State level, and the Regional Tourism Organisations (RTO's) and Visitors Centres (VC's) at the regional or local level. Tourism Council WA (TCWA) is the leading tourism advocacy agency in Western Australia providing support to the state tourism industry and tourism associated services, with the Western Australian Indigenous Tourism Operators Council (WAITOC) representing Indigenous tourism operators in Western Australia.

The Shires of Chittering, Dandaragan and Gingin are supported by the WDC which is a statutory authority of the Western Australian government, with a Board of Management selected from the community, local governments and ministerial appointments. They are the key economic development agency for the region which partners, plans, facilitates and promotes development that results in the Wheatbelt being a better place to live, work, invest and visit.

The Shires of Chittering, Dandaragan and Gingin support the development of tourism to the economy through the various VC's which provide visitor services to tourists to the Shires. The Western Australian Community Resource Network (WACRN) is comprised of over 100 rural, remote and regional Community Resource Centres (CRC's). The centres are not-for-profit organisations that are independently owned and operated by their local community providing access to government and community services and information, and undertaking community, business and economic development activities. They are supported by the Department of Primary Industries and Regional Development with funding from the State government's Royalties for Regions program.

Figure 2. Tourism Structure at Federal, State and Local Level.

Tourism structure for the Northern Growth Alliance

Federal Level

Regional Development Australia Wheatbelt

Regional Development Australia (RDA) is an initiative of the Australian Government that aims to enhance the growth and development of regional areas by bringing together the three levels of government (Federal, State and Local) to provide a strategic and targeted response to issues in regional areas.

The core role of RDA Wheatbelt is to build strong and effective partnerships with key stakeholders and work with them to provide a coordinated approach to address economic, environmental and social issues impacting on the region.

The *RDA 'Wheatbelt Regional Plan 2013 – 2018'* (2016) includes megatrends outlined by the CSIRO presenting opportunity for the Wheatbelt region:

> **Tourism:** The Wheatbelt is in a prime position to capitalise on the growing demand for experiential services (e.g. tourism), particularly for the Asian market. The clear skies and open spaces that are a trade mark of the Wheatbelt are highly attractive to Asian (and other) tourists who venture from densely populated urban environments. Innovative and targeted marketing of the regions tourism assets is required to improve knowledge of the Wheatbelt as currently it is not a well-known area to tourists domestically or internationally.

The Regional Plan includes tourism as a priority planning and leadership project as an emerging industry, to promote economic growth.

Tourism Australia

Tourism Australia (TA) is the Australian Government agency responsible for attracting international visitors to Australia, both for leisure and business events. The organisation is active in around 16 key markets and activities include advertising, public relations and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research.

Tourism 2020

'Tourism 2020' is a whole-of-government and industry long-term strategy to build the resilience and competitiveness of Australia's tourism industry and grow its economic contribution. It focuses on improving the industry's performance and competitiveness by pursuing new opportunities for growth and addressing supply-side factors.

The *'National Long-Term Tourism Strategy'* was launched in December 2009, followed by the 2020 Tourism Industry Potential in November 2010. Following a review of the progress made by the National Long-Term Tourism Strategy Working Groups and the 2020 Tourism Industry Potential, the updated Tourism 2020 (2015) now incorporates four strategic areas:

1. Limit the tax, red tape and other regulatory burden industry faces,

2. Work with industry to support the development of tourism infrastructure that can drive demand,

3. Encourage high quality tourism experiences, including Indigenous tourism,

4. Undertake coordinated and effective marketing campaigns to drive demand.

From early 2016, TA's 'There's nothing like Australia' campaign has focused on one of Australia's key competitive advantages – aquatic and coastal. This followed campaigns encompassing food and wine and Indigenous experiences which were rolled out throughout 2015-16. The marketing campaigns released in 2018 include a series of 'Dundee' videos released in the United States of America, the first released during the American Super Bowl with an audience reach of over 100M and the second released in October; and 'Undiscover', which is targeted at the high value travellers from the South East Asian market – Singapore, Malaysia, Indonesia and India.

State Level

Government of Western Australia

The Government of Western Australia's *'State Planning Strategy 2050'* (2014) (SPS) is the primary document within State Government providing a strategic framework for planning and development throughout the state. The Strategy provides a vision for sustained growth and prosperity to 2050, and is underpinned by core principles, strategic goals and directions which will shape the land-use and planning of Western Australia (Figure 3).

Figure 3: **State Planning Strategy Structure.**

VISION: SUSTAINED GROWTH AND PROSPERITY
Diverse   Liveable   Connected   Collaborative

PRINCIPLES
Community   Infrastructure   Economy   Regional development
Environment   Governance

STRATEGIC GOALS
Global competitiveness   Strong and resilient regions   Sustainable communities
Infrastructure planning and coordination   Conservation

STRATEGIC DIRECTIONS

1. Economic development	2. Physical infrastructure	3. Social infrastructure
1.1 Resource economy	2.1 Movement	3.1 Spaces and places
1.2 Knowledge transfer	2.2 Water	3.2 Affordable living
1.3 Tourism	2.3 Energy	3.3 Health and wellbeing
1.4 Agriculture and food	2.4 Waste	4. Environment
1.5 Remote settlements	2.5 Telecommunications	5. Security
1.6 Land availability		

ACTION PLANNING
Implementation   Evaluation

Source: State Planning Strategy 2050, Government of Western Australia (2014)

Regional development is considered a key principle, with strong and resilient regions one of five strategic roles. Sixteen strategic directions are placed to shape the context of the strategy with tourism considered a fundamental direction in shaping the state of Western Australia.

Table 13. A Strategic Approach to Planning Tourism, State Planning Strategy 2050.

ELEMENT	2050 OUTCOMES	MEASUREMENT	ASPIRATIONS
Land availability	Land is available to meet the needs of enterprise	Availability and affordability of land for enterprise	• A suitable and affordable supply of land is made available for the long-term needs of people across the State • Suitable land is allocated and zoned for enterprises, business and industry, including project ready industrial lands, buffers and infrastructure • Crown land transactions are considered at the earliest stage of the land-use planning process and project delivery initiatives
Infrastructure	WA invests in infrastructure that stimulates productivity and economic growth	Infrastructure capacity and investment levels	• Infrastructure is well-connected and coordinated for modern living and emerging economies • WA operates on the technological frontier integrating the most modern infrastructure and ICT • WA responds to hard and soft infrastructure challenges with flexible financing and delivery approaches • Land is zoned or reserved for economic activity including strategic industrial sites and supporting infrastructure and buffers
Global competitiveness	WA out-competes other areas for global investment in a range of new enterprises	Attracted global capital	• The regions consistently attract and retain skilled workforce • Key regional centres emerge as global gateways that capture trade supply chains • WA consistently attracts global investment that enables emerging enterprise to develop and raise productivity • Perth continues to attract and retain corporate headquarters • The State's airports and seaports provide increased access to global trade and resources • GSP/capita growth rate is maintained at 2% per annum
Economic diversity	The State's economic diversity enables resilience to changing economic conditions	Economic resilience and diversity of the WA economy and regional areas	• WA continues to provide a range of goods and services to the global economy • WA provides international standard research infrastructure • The regions have become more economically diverse • WA has developed globally-recognised industries in the fields of medicine, agriculture, environmental science, value-added manufacturing, tourism and game development
Industrial ecology and economic clusters	The State's industrial areas are eco-efficient and encourage co-location of similar enterprises	Levels of efficiency, synergy and innovation in strategic industrial areas	• Industrial areas are structure planned to produce optimal output with minimal waste • Clusters of industry drive productivity and stimulate new ancillary businesses • Research and technology clusters support and foster economic diversity • All strategic industrial areas are developed to an approved structure plan
Innovation, knowledge, research and development	WA is a world leader in technological, organisational and service innovation	Level of innovation and creativity in WA for all areas of enterprise	• WA continues to be a world leader in mining and energy sectors, as well as in the supply of environmental and community services (health, education, culture and the arts) • WA has built on research in the bio and life sciences to develop world class food processing centred on supply chain integrity and the targeted marketing of high value-added products • WA continues to be a leading international education provider and a leading supplier of research services in science and technology

Source: State Government of Western Australia

The Government's 'State Tourism Development Priorities' include seven priorities across the regions with the objective to access and enhance a range of experiences unique to the State. Of these seven priorities, only one could be considered relevant to the Alliance that being the development of regional infrastructure such as caravan parks. The overview provides for a range of unique experiences including outback adventures, ecotourism, and nature based activities, to be developed capitalising on a region's competitive advantage. Table x provides an overview of the State's strategic approach to planning tourism.

Western Australian Indigenous Tourism Operators Council

The Western Australian Indigenous Tourism Operators Council (WAITOC) is a membership based not-for-profit association representing Indigenous tourism in Western Australia. The Association is autonomous and provides advice and information to all relevant State Government agencies as well as the tourism industry sector. WAITOC promotes Aboriginal tourism and provides a supportive network for Aboriginal tourism operators within Western Australia. It represents over 100 Aboriginal tourism operators ranging from accommodation, traditional dance and dreamtime stories to contemporary history, safari, bush tours and art.

The Aboriginal Tourism Development Program 2014-2018 was developed to help grow Aboriginal tourism in Western Australia. Funded by the State Government's Royalties for Regions program and implemented by TWA and WAITOC, it incorporates two elements:

1. **Marketing** - The marketing component will generate awareness of Aboriginal tourism experiences in WA and will benefit all operators. It will also help export-ready Aboriginal tourism businesses to gain exposure and build relationships in global travel-trade distribution channels.

2. **Business development** – Aboriginal tourism businesses will receive business advice and mentoring as part of the program. Coaches will work with each operator to undertake an initial business health check considering areas such as compliance, financial, staffing, business systems, tourism accreditation, product offering and delivery.

The Western Australian Aboriginal Tourism Product Manual showcases Western Australia's key 'Export Ready' and 'Market Ready' tourism products which are either Indigenous owned and/or operated, or operated in conjunction with Indigenous Tourism businesses to deliver an Indigenous experience.

Tourism WA

Funded by the Government of Western Australia, TWA is responsible for:

- Marketing WA as a tourism destination,

- Sponsoring major international and home-grown events that attract visitation to and around WA,

- Facilitating major tourism infrastructure and investment.

TWA oversees the distribution of funding to the state Regional Tourism Organisations (RTO's):

- Experience Perth,

- Australia's South West,

- Australia's Golden Outback,

- Australia's Coral Coast,

- Australia's North West.

The *'State Government Strategy for Tourism in Western Australia 2020'* aspires to double the value of tourism to the state from $6B in 2010 to $12B in 2020. To achieve this, TWA has identified seven strategic pillars for growth outlined in Figure 4. Of the seven pillars, regional travel, business travel, infrastructure and indigenous tourism are growth areas aligning with the potential tourism growth in the Alliance.

Figure 4. Seven Key Pillars for Growth.

Source: Tourism WA

Following a review by the State Auditor General, Tourism WA had implemented a '*Two Year Action Plan'* to grow the number of visitors to the State throughout 2018 and 2019. Highlights of the plan include:

- Maximising leisure visitation from AFL games at Optus Stadium with a target of 18,000 additional visitors a year,

- Working with Qantas to maximise the London-Perth route to encourage stopovers and regional dispersal,

- Securing and hosting major travel trade events,

- Attracting more overseas direct flights to Perth,

- Launching a new home-grown Perth event in 2019.

Interim figures for the 2018 season showed 31,059 interstate and 34,665 intrastate (regional WA) visitors came specifically for Optus Stadium events. Initial data tracked monthly is showing 75 – 82% of travellers on the London-Perth route disembark in Perth with no immediate onward travel (inter- or intra-state) indicating a potential for self-drive holidays for this market. Additional events secured in Western Australia include Australian Tourism Exchange in April 2019, Corroboree West in October 2019 and Dreamtime in December 2019.

Specific to regional WA is a plan to attract more people more often through marketing regional destinations and regional events, facilitating new tourism experiences, help meet demand for Aboriginal tourism experiences, and facilitate improved regional aviation access and value.

Marketing Campaign and Brand Strategy

Asia is considered a high growth market and is a key focus of the current Strategy. Potential markets are China, Singapore and Malaysia; targeted investment markets are Japan, Indonesia and Korea; market to monitor is India; and markets to protect include the domestic market, UK, Germany, New Zealand and the USA.

The 'Experience Extraordinary' campaign has evolved to incorporate the 'Just Another Day in WA' brand. The current campaign includes a selection of single and multi-experience destinations from throughout the state.

On Friday, 19 October, 2018, the Western Australian State Government released a new tourism campaign to be marketed through Tourism WA, 'Western Australia: The road trip state'. The $2.2M campaign will focus

on self-driving holiday routes using the size of WA and its wide range of experiences as a selling point. Nine international markets will be targeted including Singapore, Malaysia, China, Hong Kong, Japan and Indonesia, as well as Germany, the United Kingdom and New Zealand. Additionally, the campaign will also be released domestically to encourage West Australians to holiday within the state.

Taste 2020

Following the study conducted on food and wine tourism in WA, TWA developed a strategy for food and wine tourism in WA for 2015 to 2020, and beyond. The purpose of the strategy was to strengthen WA's position as an internationally recognised destination where visitors can savour gourmet produce, fresh seafood, premium wines and boutique beverages. It provides a cohesive framework to align the State's tourism, wine, agricultural and fishing industries, enabling WA to deliver on visitors' demands to taste authentic local produce in spectacular surroundings (2015).

Strategic themes were developed to align with consumer demands:

1. **Appropriate regulatory settings** – to create the right regulatory environment for the food and wine tourism industry, including appropriate business systems and stakeholder communication; facilitate visitor access to fresh, local produce and ability to consume it in nature-based locations; maintain biosecurity and quarantine measures that protect WA's product; and explore ways of branding food with a focus on provenance and food quality.

2. **Improving industry standards and quality** – delivering hospitality workforce development programs and educational/school programs (such as the Hospitality Ambassador Program) to improve the overall quality of service; emphasising the importance of value for money to customers; and encourage uptake of tourism accreditation and develop new module focused on food and wine tourism.

3. **Developing new tourism experiences** – implement a pilot program to educate producers about tourism/ undertake educational workshops or develop a 'how to' guide for farmers interested in diversifying into tourism; support and develop Aboriginal cultural experiences with a food and wine element; and improve roads, signage and telecommunications infrastructure (mobile/broadband) in areas where food and wine tourism businesses are located.

4. **Festivals and events** – continue to grow the Margaret River Gourmet Escape as a leading food and wine event globally and elevate other priority events; continue to support regional events which promote the unique produce of their region; incorporate events into tourism marketing initiatives and promote a calendar of food and wine events; and consider opportunities for trade engagement events.

5. **Promotion and Marketing** – building on the State tourism brand, 'Experience Extraordinary', showcasing food and wine experiences in spectacular locations; leverage the strong consumer recognition of WA seafood and the Margaret River region's food and wines as part of this positioning; develop new and innovative marketing campaigns to close the perception gap around food and wine quality; collaborate on cross-sector marketing and trade engagement initiatives, particularly in major export markets such as China; identify packaging opportunities for culinary tourism that complement existing activities, experiences and events; and hold regular meetings with Industry and State Government bodies to share results of research and projects influencing food and wine tourism.

A partnership approach has been implemented to ensure the success of the strategy, including various departments and agencies, and regional development commissions (RDC). Key experiences, events and produce for each RDC have been highlighted to help align regional and State-wide marketing initiatives and identify future development and diversification of food and wine tourism:

Wheatbelt	
Key Culinary Tourism Experiences	Lobster Shack, Cambinata yabbies, outback pub dining, community markets, bakeries (Bindoon, New Norcia)
Culinary Events	Avon Valley Gourmet Food and Wine Festival, Northam, Indian Ocean Festival, Jurien Bay, Cambinata Extravaganza, Kukerin, Toodyay International Food Festival (during the Avon Descent), Dryandra Country Art, Food and Wine Trail (Mother's Day weekend), Narrogin.
'Must Try' Products	Rock lobsters, yabbies, citrus fruits, olives and olive oil, New Norcia bakery goods, Facey Country lamb.
Development Opportunities	The development of food and wine trail incorporating heritage, artworks and artists of the region. Further development and marketing of Heartlands Hampers showcasing unique food products made in the Wheatbelt. The WDC has also identified the following tourism development priorities which can involve culinary elements: increase accommodation offerings; develop more structured experiential tourism activities; develop trails (walk, cycle, drive); collaborative marketing at enterprise, sub-regional and regional levels; targeted marketing campaigns to attract international visitors.

Heritage Tourism Strategy

In collaboration with the Heritage Council, Tourism WA developed a strategy document designed to demonstrate the importance and value of heritage tourism, provide leadership and direction and a framework for decision-makers and practitioners, as well as replacing fragmented and uncoordinated initiatives with a concerted and systematic approach. Although released in 2004, many aspects within the strategy remain relevant:

- Product diversity with the identification of nine themes including Indigenous, maritime, convict, ecclesiastical, gold rush, rail, military, timber and Kimberley,

- The economic value of heritage tourism to the state of WA,

- Product attributes including uniqueness, sustainability, diversity, spread, icons, partnerships, community value, and attendance value.

Caravan and Camping Action Plan 2013 – 2018

Aligning with the State Government Strategy tourism development priority of improving caravan, camping and self-drive experiences, the 'Caravan and Camping Action Plan 2013 – 2018' was developed to increase opportunities for Western Australians and visitors to experience affordable and safe caravan and camping holidays in WA. A number of key action plan recommendations which were identified ranging from a review of the Australian Caravan and Camping Ground Act (1974), increasing supply through investment and redevelopment including on Indigenous land, review of overflow guidelines, training programs for caravan park management and staff, and an annual marketing strategy.

Consumer Research and Insights

A number of surveys and interviews have been conducted by TWA, TA and TRA monitoring changing perceptions, motivations, and desires of consumers.

'Understanding Repeat Visitation to Western Australia' (2018) investigated the potential for repeat visitation to WA. The key findings were:

- Repeat visitors outnumber one-time visitors,

- Satisfaction is a pre-condition of repeat visitation but not a driver in its own right,

- Repeat visitors are more likely to be empty nesters, SINKS and DINKS.

A recent study by the Mid-West region – the Shires of Irwin, Coorow, Dandaragan, and Northampton - has identified that Jurien Bay and Cervantes are by far the most visited area in the Mid-West. The '*Mid West Coastal Nodes Visitor Survey' (2018)* has also identified that in the 2017/2018 financial year, visitors planned to stay 2 to 3 nights, spend on average $241 per visit, 69% advising they would stay at Sandy Cape camping site, with the

main suggestion for improvement being the installation of showers or upgrading of toilets.

'Domestic Market Consumer Insights 2017' (2017) identified the following:

- When choosing a holiday destination, the following factors were considered most important:

  » A safe and secure destination,

  » A destination that offers value for money,

  » World class natural beauty and wildlife,

  » Friendly and open citizens, local hospitality,

  » Rich history and heritage,

  » Good food, wine, local cuisine and produce.

- When booking a holiday, consumers use the following sources:

  » Travel agent – phone/in person,

  » Directly through an airline - online,

  » Accommodation provider - online,

  » Travel agent – online,

  » Directly through airline – phone/in person,

  » Accommodation provider – phone/in person,

  » Tour operator – online,

  » Tour operator – phone/in person.

'Visitor Experience and Expectations Research (VEER) 2016-2017' (2017) was conducted on both the national and international markets measuring visitors' experiences, expectations and general thoughts of WA and their holiday, and identified that the main motivation for all visitors types (intrastate, interstate and international) was to visit:

- Beaches and coastal scenery,

- Unique natural sights,

- Family and friends,

- Pristine natural environment,

- Good food, wine and local cuisine.

Food and wine tourism provides a key experience for visitors to Western Australia, whether those travelling domestically or travelling from international locations. A study was conducted by Tourism Research Australia (TRA) (2014) which considered:

- Profile for domestic food and wine visitors to WA,

- Visitor motivations in choosing their holiday destination,

- Experiences sought by visitors to WA,

- The importance of food and wine tourism to WA visitors, and satisfaction with their experiences in WA's tourism regions.
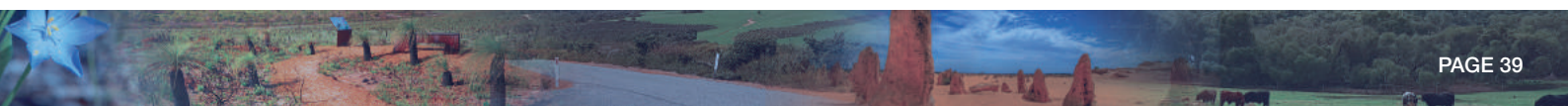
A number of key drivers were identified in attracting visitors to WA:

- **Local and authentic** offerings should be considered over developing more niche experiences,

- **Beautiful and spectacular surroundings** rates as important to visitors,

- **Food and wine events** were key opportunities for cross-promotion for other food and wine events,

- **Range of offerings** was identified as a key opportunity, from casual to more formal,

- **Information services** through friends, family and maintaining a web presence were the most common sources of information for visitors seeking food and wine experiences in WA.

The most important factors to visitors when choosing a holiday destination in Western Australia were:

1. The ability to explore by car,

2. Beautiful beaches and coastal scenery,

3. Unique and extraordinary natural sights,

4. An unspoilt or pristine natural environment,

5. Offers good food, wine, local cuisine and produce.

Information sources visitors used to plan their trip to WA included:

1. Friends and family,

2. Google search,

3. Previous experience,

4. Visitor information centres,

5. Travel, tourism, regional websites.

Department of Biodiversity, Conservation and Attractions – Parks and Wildlife Service

In response to the requirement of preparation for coastal hazards such as erosion and inundation, the Shires of Dandaragan and Gingin have been collaborating with state government agencies and the Northern Agriculture Catchments Council to prepare Coastal Adaption Plans and Coastal Erosion Hazard Maps, undertaken in accordance with State Planning Policy 2.6: Coastal Planning Policy.

The Shire of Dandaragan comprises four townships – Badgingarra, Cervantes, Dandaragan and Jurien Bay – as well as the coastal settlements of Wedge and Grey. These settlements, located on unvested reserves, are placed under the management of the Department of Biodiversity, Conservation and Attractions and are currently subject to a number of assessments in relation to asbestos contamination (Department of Biodiversity, Conservation and Attractions – Parks and Wildlife Service, 2017a; Senversa, 2017; Aurora, 2016), coastal vulnerability (BMT Oceania, 2015) and recreation development concept planning (Department of Parks and Wildlife, 2016; Department of Parks and Wildlife, 2014).

Department of Culture and Arts

Following the release of a discussion paper in May 2015, the Arts Leadership Group (ALG) developed a vision for arts and culture in Western Australia with five year targets for government, the arts and culture sector and the community to deliver the broader vision by 2030. The '*Strategic Directions Framework 2015 – 2030'* outlines the key sectors for arts, culture and creative industries and aligns growth in these sectors with the key drivers of the 'State Planning Strategy 2050'.

Department of Main Roads

Since the opening of Indian Ocean Drive in 2010, the increased traffic volume has resulted in an increased crash risk to motorists. Between 1 January 2012 and 21 August 2017, 146 crash events were recorded resulting in three fatalities primarily in the section of road between Two Rocks and Lancelin. The Department of Main Roads conducted the *'Safe System Review'* (2017) which identified a number of recommendations to improve the safety of this section of road, including safe speeds, roadsides and road use to reduce the risk and severity of crashes along the Indian Ocean Drive.

Short and medium-term responses were recommended. Short-term responses include education, continued enforcement focus through high visibility highway patrols and speed limit adjustment to 100km per hour. Road engineering improvements include audible line marking on road edges and on the centrelines, improved signage, intersection improvements and treatments to improve sight lines. The most significant safety treatment is the recommendation to widen the seal and install a one-metre wide centreline with audible lines.

Common feedback from visitors to the region through the Turquoise Coast VC is regarding poor signage for tourism assets along this route. Currently there are limited options available to remedy this challenge as the Department of Main Roads controls and limits signage on significant routes.

Department of Mines and Petroleum

A large area of the Alliance, particularly the Shires of Gingin and Dandaragan, is coastally located and although original development was constructed distant from sand dunes, migration of sand now poses a threat to existing and new development. '*Migration of limesand dunes in Western Australia and their impacts'* (2017) assesses the geohazard along the Mid-West coast of Western Australia, from Geraldton to Lancelin, and focuses on twelve identified sand dunes or groups of dunes which may impact on the infrastructure or conservation of the areas, and provides recommendations to stabilise the dune migration for the coastal dunes including Sandy Cape Dune, Grey Dune, Wedge Island Dune and Lancelin Dune.

Department of Planning, Lands and Heritage

Each of the Alliance shires have a Local Planning Strategy, which sets out the Council's vision for the Shire and the longer-term directions for land use and development over the next 15 to 20 years. It is the principal strategy for land use and development of the State and regions of Western Australia, with the requirements set out in the *Town Planning Regulations (1967)*. Each of the Shires' Local Planning Strategies has identified tourism as a key economic activity in the Shire, with objectives and actions identified to further enhance tourism.

Regional Level

Wheatbelt Development Commission

The Wheatbelt Development Commission is the statutory authority of the state government, and the key economic development agency for the region. The Commission partners, plans, facilitates and promotes development that results in the Wheatbelt being a better place to live, work, invest and visit. The Wheatbelt region is divided into sub-regions, with strategies developed providing a more focused approach for actions and outcomes.

The *'Central Midlands Sub-regional Economic Strategy'* (2014) has identified the towns of Jurien Bay, Cervantes, Bindoon/Muchea, Gingin and Lancelin as an above average competitive advantage in tourism and/or has existing activity leveraging this opportunity. Split into coastal and peri-urban markets, the coastal towns currently have strength in informal domestic overnight tourism activity in the form of second and holiday homes. The report identified that the increase of provision of accommodation, and its various forms, is essential to further formalising this market. The peri-urban centres of Chittering and Gingin have established day-trip tourism markets, with historical and agri-tourism opportunities important in increasing tourism growth in these local government areas (LGA's). Furthermore, key actions for the tourism sector have been identified for each of the LGA's:

- Shire of Chittering – development of a local tourism and events strategy,

- Shire of Dandaragan – development of adventure, eco, farm and nature-based tourism; investigation of a new airport site; development plan for the Jurien Bay Boat Harbour to create a vibrant commercial, tourist and recreational precinct,

- Shire of Gingin – development of a diversity of accommodation options to capture an increased share of overnight visitors vacationing along the coast; development of 'luxury camping' accommodation to increase overnight visitation; increase awareness of the 'food bowl' branding; a collaborative approach towards promotion of tourist attractions in the Shire and neighbouring LGA's; construction of a boat ramp in Ledge Point to facilitate greater recreational and tourist use.

The *'Wheatbelt Blueprint – A Vision for a Brighter Future'* (2015) is the strategic plan for the Region which articulates vision and growth targets for the Wheatbelt and provides a framework to guide future growth. The Wheatbelt Roadmap for Growth includes four key areas for action, with a Vibrant Economy - Industry Development, Emerging Trends incorporating tourism as a priority action.

The '*Regional Development Strategy 2016 – 2025'* in conjunction with the 'Wheatbelt Blueprint' (2015) directs the development and investment in the Wheatbelt, incorporating the Shires of Chittering, Dandaragan and Gingin, building vibrant regions with strong economies through jobs growth, economic growth and capable people. The key focus areas are:

- Establishing the socio-economic foundations for development,

- Driving growth and new investment,

- An ongoing commitment to communities.

Visitor Centres

VC's are a 'clearly labelled, public accessible, physical space with personnel providing predominantly free of charge information on the area's attractions, accommodation, maps and other items relevant to tourism which enhance the travellers overall experience' (Nelson, 2015). VC's have the potential to increase the efficiency of the travel system as they act as a one stop shop for travellers searching for advice and information on attractions, events, services, and facilities within the area (Ballantyne et al, 2009)

There are four key roles or functions of visitor centres (Pearce, 2004) which are met to varying degrees by VC's:

1. Promotional,

2. Orientation and enhancement,

3. Control and filtering,

4. Substitution.

The top three features that visitors look for in VC's are:

1. Knowledgeable, professional staff, skilled in customer service,

2. Unbiased and authoritative information, and

3. Regional displays and stories.

Tour and accommodation bookings are also features that visitors look for when visiting VC's, however are not as important as the three features listed above (Haeberlin, 2014).

Research conducted in 2015 by TWA and TRA on the influence of Western Australian VC's on tourist behaviours identified the following key messages:

- VC use is driven by situation, not visitor type. Most tourists will stop at VC's if they require information, and most stops are pre-planned.

- Tourists most often use a VC when they are a first time visitor to a location; when they have had insufficient access to information before their arrival; or when they are staying more than one night.

- The most common motivators for stopping at a VC are to access information on attractions, obtain maps or find information on activities,

- Respondents who had not used a VC in the location interviewed are not rejecting them as most have used them in the right situation previously.

- VC's make an immediate financial contribution in their local area, and more broadly enhance the quality of visitor experiences and encourage future advocacy by visitors to the region.

- There is a modest positive impact on the length of stay and spend for VC users, particularly in more remote regional locations.

- WA VC's are performing well, and the local perspective that staff provide with regard to things to see and placed to eat being particularly valued.

- Overall, 94% of respondents using a VC in this study are satisfied with their experience, include 70% very satisfied.
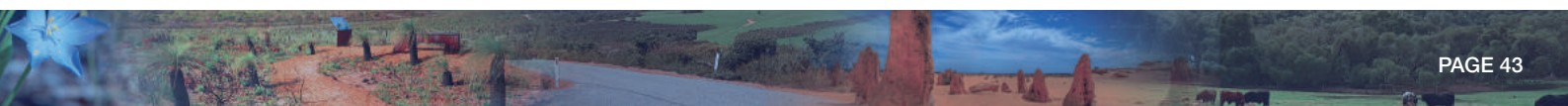
Shire of Chittering

The *'Shire of Chittering Economic Development Strategy 2015 – 2025'* (2016) was developed to provide a ten year plan that includes broad objectives and strategies that are aimed at strengthening the region's economic base. Key priorities were identified and include:

1. Enabling infrastructure,

2. Business support and growth,

3. Visitor attraction,

4. Economic precincts,

5. Regional collaboration.

Visitor attraction correlates highly with the level of tourism to the area. Key actions to drive visitor attraction to the Shire of Chittering include:

- Create and support festivals, encourage new markets, support local stalls and produce, VC promotion, hosting and supporting significant events,

- Development of a local tourism and events plan,

- Promote our local environment with places to visit, whilst protecting our environment.

Regional collaboration is also considered significant by the Shire of Chittering to encourage tourism development both in the Shire and in surrounding Shires. The development of a regional alliance, cooperatives, groups such as the Chittering Tourist Association, networking and the Regional Organisation of Councils will all ensure the success of tourism for the Shire.

The Shire of Chittering *'Strategic Community Plan 2017 – 2027'* (2017) is structured along five major strategies:

1. Community,

2. Natural environment,

3. Built environment,

4. Economic growth,

5. Strong leadership.

Increased visitors has been identified in economic growth, with strategies including supporting and promoting accommodation options, supporting and growing events to attract visitation, and facilitating, promoting and supporting eco-tourism. These strategies will be actioned by promoting and developing the Chittering Trails Network, planning controls and projects which support diverse options for short stay accommodation, and supporting and promoting accommodation options including resort style facilities, caravan parks, overnight stops, B&B's and farmstays.

The *'Chittering Visitor Centre Strategic Plan July 2016 – June 2019'* has identified six key business drivers and strategies for tourism in the Shire of Chittering:

1. **Service** – to provide relevant and accessible services in a welcoming environment to visitors/tourists,

2. **Marketing** – to grow the profile and support for the Chittering region as a tourist destination through strategic marketing, accessible technology and information, and community engagement,

3. **Partnerships** – to develop and maintain partnerships that contribute to mutual benefits and support tourism development.

4. **Workforce and governance** - to apply a high standard of governance, management and organisational development that promotes involvement and effective operations,

5. **Finance** – to attract and retain funding and income and apply good financial management to support viability of the Chittering VC,

6. **Infrastructure** – to provide and support facilities and infrastructure that is user-friendly, accessible and contributes to a positive experience in the Chittering region.

The *'Mountain Bike Trails Master Plan'* (2016) meets the outcome for the Chittering Economic Development Strategy 2015 – 2025' – enact the identified projects in the Chittering Trails Network Plan. It identifies opportunities within the Shire of Chittering to provide high quality mountain biking experiences for ratepayers that also have significant new tourism attraction potential. Eight potential sites were identified for consideration, including Clune Park, Carty Reserve to Clune Park Family Touring Trail, Blackboy Ridge Cross Country Trail, Muchea Dual Slalom Jump & Pump Track, Muchea East, Wandena Community Bike Park, Toodyay Road/Bald Hill/Avon National Park to Bindoon Touring Trail, Sussex Bend Community Bike Park, and Wannamal Community Bike Park. A staged approach has been recommended based on need, potential benefits and availability of funding.
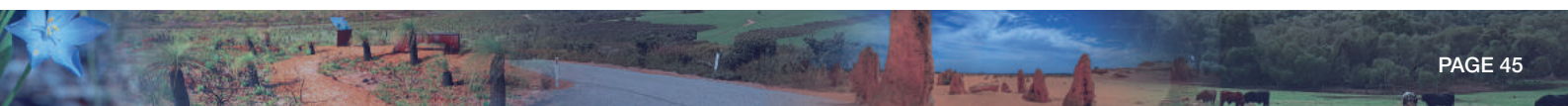
Shire of Dandaragan

The '*Shire of Dandaragan Corporate Business Plan 2016 – 2020'* (2016) and the '*Shire of Dandaragan Strategic Community Plan 2016 – 2026'* (2016) outline the Council's strategic priorities which includes tourism and marketing with a focus on promotion and product development based on natural assets. To achieve these strategic priorities, five key goals are recognised:

1. Great place for residential and business development,

2. Healthy, safe and active community,

3. Strong and connected community,

4. Healthy, natural and built environment,

5. Proactive and leading local government.

Key objectives relevant to tourism are identified in the goals:

1. Facilitate population and visit attraction and growth to expand and diversify the regional economy,

2. Maintain and conserve significant cultural and built heritage.

Additionally, the Community Plan addressed managing the pressure of visitation and locals of the coastal and beach reserves. A major review of the Community Plan is currently underway with completion scheduled for early 2019.

The Shire of Dandaragan *'Local Tourism Planning Strategy'* (2012) is the guiding strategic document for tourism planning matters within the Shire of Dandaragan. The objectives of the Strategy are to:

- Provide for the sustainable growth of tourism by identifying and retaining sites for the future development of a range of tourist accommodation to meet the projected demand for the Shire of Dandaragan,

- Encourage affordable holiday accommodation through the provision of suitable land and retention of existing caravan parks and camping grounds in prime locations,

- Protect identified tourism locations or sites from the encroachment of uncomplimentary or conflicting land uses,

- Encourage best practice tourism development through a high standard of design and layout and the provision of facilities,

- Acknowledge the importance of tourism to the local economy in the preparation of strategic plans and policies,

- Identify and address the anticipated growth of tourism to the Shire of Dandaragan, and to encourage development that provides a competitive advantage to other tourist destinations,

- Address the importance of tourism to the Shire of Dandaragan through its local planning scheme zones and provisions.

Eighteen recommendations have been identified which address the key challenges and ensures a sustainable tourism industry that nurtures its natural assets, supports the local community and meets the needs of the visitor.

The *'Jurien Bay Town Centre Revitalisation – Economic Evaluation'* (2017) was designed to enhance tourism, economic opportunities and private investment in Jurien Bay through traffic management, parking provision and power supply. Taking a staged approach, it is anticipated the project will be undertaken over a three year period commencing in 2018/19, at a cost of $8.7M. It is further supported by the 'Jurien Bay Town Centre Revitalisation Project Management Plan' which identifies key administrative and organisational aspects to be undertaken to ensure successful delivery of the project.

The '*Jurien Bay Growth Plan*' (Volumes 1 and 2, 2012) was prepared as part of the Royalties for Regions Regional Centres Development Plan (Super Towns) initiative. A vision and goals were identified in response to the strategic objectives:

> *Vision: Jurien Bay – a Regional City of 20,000+ on the Turquoise Coast, which is based on continuously improving the wellness of its community and the economic development of the region, and protecting the unique and diverse environment that provides its natural setting.*

The integrated strategy aligns with the Shire's Strategic Community Plan, and includes tourism related strategies in three of the five key areas:

- Economy – development of a tourism industry development plan,

- Infrastructure – review and update of the aviation development strategy; airport development projects,

- Community – community development plan implementation including culture and arts and events program,

- Spatial planning and built form,

- Environment.

'Towards 20,000 Building the Turquoise Coast Regional City Plan' (2011) incorporates plans and demonstrate the Turquoise Coast will be 30kms in length with Jurien Bay as the key commercial and service centre. Divided into six precincts, four (northern, central, southern and eastern precincts) include major tourism development which is designed to enhance the tourism offering in Jurien Bay.
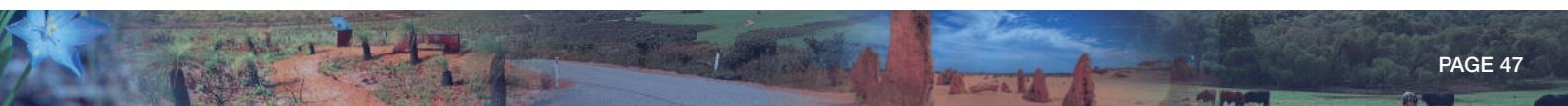
Shire of Gingin

The *'Shire of Gingin Corporate Business Plan 2017 – 2021'* is a four year business plan designed to support the execution of the Shire's vision. The key focus areas outlined align with the *'Shire of Gingin Strategic Community Plan 2017 – 2027'* which are:

- Community wellbeing,

- Natural environment,

- Infrastructure and development,

- Economic development,

- Governance.

Tourism is incorporated in economic development, with a number of priorities and actions addressed in both plans:

Strategic Community Plan Outcome	Tourist Playground – An internationally acclaimed tourist playground
Strategic Community Plan Priority	Support the development of the Shire of Gingin as a premier tourist destination for ocean and sand adventures
Corporate Business Plan Action	Expand, upgrade and maintain community facilities that support tourism and service the local community
	Ongoing delivery of Shire owned Caravan Parks
	Facilitate an increase in tourist Accommodation

Area located within the Shire of Gingin is the traditional land of the Yued Nyoongar people. The Shire of Gingin and the Yued Nyoongar People have collaborated to develop the *'Shire of Gingin and the Yued Nyoongar People Cultural Heritage Management Plan 2016 – 2019'.* This plan incorporates a vision for the Yued Nyoongar people, a list of registered Aboriginal sites and other heritage places within the Shire of Gingin, defined roles and responsibilities of the Shire of Gingin, the Yued Nyoongar people, the Shire of Gingin staff, contractors and sub-contractors, and recommendations for preserving and developing Aboriginal heritage in the Shire of Gingin. Aboriginal culture and heritage assets have been classified as environmental, economic and social. Tourism is acknowledged in both the environmental and economic assets within the Shire of Gingin.

The Seabird Progress and Sports Association has developed business plans for *'Boat and Caravan Park South of Seabird' (2014)* and *'Foreshore Groynes at Seabird' (2018)* to enhance the resident and visitor experience to Seabird.
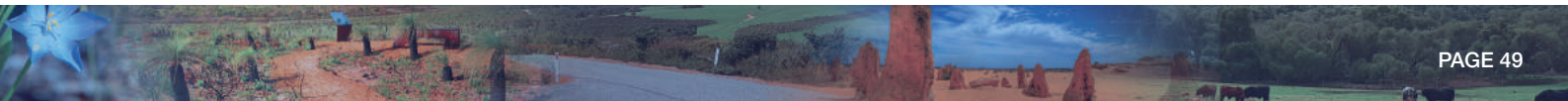
Section 5

Economic Contribution of Tourism to the Local Economy

Section 5 – Economic Contribution of Tourism to the Local Economy

Growth opportunities are evident in existing industries including tourism, where the Shires' rich heritage and historical value, vast natural and diversified landscape and potential diversity and collaboration of tourism assets provide a sustainable benefit to the Shires and their communities.

One of the key challenges in providing economic data for tourism is the lack of reference to tourism as a unique and independent industry by the Australian Bureau of Statistics (ABS). Relevant data for the economic contribution of tourism to the economies of the Shires of Chittering, Gingin and Dandaragan have been sourced from REMPLAN where economic modelling for tourism is derived through an amalgam of activities across various industry sectors including retail, accommodation, cafes and restaurants, cultural and recreational services (REMPLAN, 2018).

In order to capture the value of tourism, surveying may be conducted to gather direct expenditure data from people attending specific festivals or events. Once this survey data is collated and coded it can be applied to REMPLAN to model the direct and flow-on economic implications for the region from hosting such activities (Appendix 1).

Where representative samples of data are captured in relation to specific events the combination of market research and economic analysis is a powerful basis upon which to make strategic decisions about growing tourism activities in the region. A shortcoming of such approaches is that they can be expensive in terms of time and resources. In some circumstances secondary data may represent a cost effective alternative while still providing the insights required. In the following tables secondary datasets have been applied to estimate the contribution of tourists to the area's economy.

The Australian National Accounts provides estimates of output by industry sector, and the Tourism Satellite Account (TSA), also from the Australian Bureau of Statistics (ABS), provides estimates of the value of industry sectors' contributions to total tourism product output. Combined, it's possible to estimate the proportion of output for each industry sector that is generated to service demand created by tourists at the national level.

In the TSA, tourism is defined as:

"Comprising the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited."

Under this definition of tourism, the expenditure of domestic, international, business and government travellers are included (REMPLAN, 2018).

All tables provide data as at June 2018.

Tourism Research Australia Key Tourism Metrics and Statistical Trends

Tourism Research Australia (TRA) first developed Local Government Area (LGA) tourism profiles in 2007 to assist industry and Government decision making and to identify and support investment opportunities, particularly in regional Australia.

Data is drawn from TRA's International Visitor Survey (IVS) and National Visitor Survey (NVS), along with demographic and business data from the ABS. Profiles are prepared only for LGA's with adequate IVS and NVS sample to present robust results. It is for this reason that key tourism metrics for 2017 are provided for the Shires of Dandaragan and Gingin only. Further, data is averaged over four years, which minimises the impact of variability in estimates from year to year, and provides for more robust volume estimates. Data sets have been built by TRA for each of the Shires to provide information on the tourism statistical trends.

Profiles are provided for:

- International travel,

- Domestic overnight travel,

- Domestic day travel.

Local government boundaries—as classified in the 2014 Australian Statistical Geography Standard (ASGS) and produced by the ABS—are used as the basis for the profiles. 'np' refers to data which is not reliable and cannot be published, and '-' indicates the data is not available.

International Visitation

The IVS samples 40,000 departing, short-term international travellers aged 15 years and over who have been visiting Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports: Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

The IVS contains around 100 questions supported by 'show-cards' that are used to help the respondent answer particular sections including:

- Usual place of residence,

- Repeat visitation,

- Group tours,

- Travel party,

- Sources for obtaining information about Australia,

- Purpose of visit and places visited,

- Transportation and accommodation,

- Activities,

- Expenditure,

- Demographics.

Since 2004, the IVS has been surveying international visitors in four languages: English, Japanese, Mandarin and Korean. The total number of interviews conducted with particular residents of each country or region is distributed among airports by selecting monthly samples of departing flights and visitors on those flights to achieve acceptable sample sizes in various categories.

Survey results are weighted to data on international visitor numbers over the period, provided by the Department of Immigration and Citizenship (DIAC), with the assistance of the Australian Bureau of Statistics (ABS). The variables used in weighting the data are:

- Country of residence,

- State of arrival,

- Main purpose of journey,

- Airport of departure,

- Age and sex of visitor.

Since 1 January 2005, interviews have been conducted with 40,000 international visitors on an annual basis. The sample was increased from 20,000 in order to enhance the estimates for smaller states, territories and regions. Increasing the sample size of the IVS by 100% has improved the reliability of survey estimates.

National Visitation

The National Visitor Survey (NVS) is a large-scale telephone survey which has been conducted continuously since January 1998, and is designed to measure domestic and outbound travel by Australian residents. The NVS is funded by the Commonwealth Government, and state and territory governments under the auspices of the Australian Standing Committee on Tourism (ASCOT).

NVS concepts and definitions are based on those developed by the United Nations World Tourism Organization (UNWTO). NVS eligibility includes any Australian resident who is 15 years of age or more, and has lived in their current residence for at least three months. NVS interviews are distributed evenly across most days of the year (with the exception of 12 public holidays), which means that the current annual quota of 120,000 interviews are completed at a steady rate of around 2,300 per week.

Sample size and sample type across the time-series:

- 80,000 annual landline sample from 1998 through to 2004,

- 120,000 annual landline sample from 2005 through to 2013,

- 120,000 annual dual-frame sample continues from 2014 onwards, but with a 50:50 mobile/landline split through to the end of 2017.

TRA have moved to 60:40 mobile/landline sample split in 2018. Future increases in mobile sample share are likely, assuming the growth of mobile-only households continues.

The types of trips collected by the NVS include overnight trips, day trips and outbound (international) trips, though some types of routine trips (such as same-day journeys to work) are excluded. Overnight or outbound trips of more than one calendar year in duration are also excluded.

To ensure each respondent is able to accurately recall the details of any trips, information is only collected for recent trips. The respective recall periods are seven days for day trips, 28 days for domestic overnight trips, and three months for outbound trips. The information collected from all respondents (whether or not they have reported recent travel) includes:

- Place of residence,

- Respondent's age and gender, marital status and employment status,

- Household characteristics such as income, number of persons, etc.
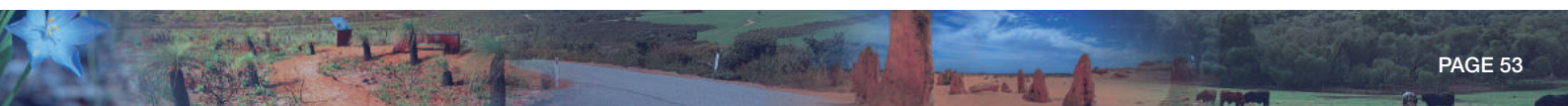
For those respondents who have reported recent travel, information is collected for each reported trip, and some of the main data collected includes:

- Main destination location for day trips and outbound trips,

- Stopover location(s) for domestic overnight trips,

- Purpose of trip or stopover,

- Accommodation and transport used,

- Leisure activities,

- Itemised trip expenditure,

- Travel party.

The above are indicative of the type of information routinely collected in the NVS, however, there are more data items collected. Further, the questionnaires are modified each calendar year to collect information on emerging issues in the tourism industry, and to meet the information needs of the Commonwealth Government and the state and territory governments.

Up to the end of 2013, the NVS sample only included residential landline phones. From January 2014 onwards, the sample design was modified by the addition of mobile phones. This change was in response to the growing population of persons who live in mobile-only households. The population of Australians who do not have a landline phone is growing each year, and in 2016 was estimated to include more than 30% of persons aged 15 years or more. Without the addition of mobile phone sampling in 2014, the NVS would have suffered from an ongoing increase in coverage bias which would have made the NVS estimates increasingly inaccurate over time.

Because many people have a mobile phone and a residential landline phone, there are effectively three phone ownership populations:

- Persons with a landline phone only,

- An "overlap" population of persons who have both phone types (and may be sampled by either mobile or landline),

- Persons with a mobile phone only.

The NVS collects the same demographic and travel information from the landline and mobile phone respondents. Additional screening questions are asked of mobile phone respondents to ensure it is safe for them to be interviewed and that they are in-scope for the survey.

As was expected, the travel patterns reported by people interviewed on mobile phones differ from those interviewed on residential landlines. The scale of those differences meant that the introduction of mobile phone sampling for the NVS generated a break in series from the beginning of 2014.

(Tourism Research Australia, 2018).

Northern Growth Alliance Economy

Tourism Output Profile

The tourism output report with tourism sector provides the gross revenue in prices generated by businesses and organisations in the NGA. The estimated output generated by tourism for each industry sector has been deducted and consolidated into a separate tourism sector.

The total output estimate for the NGA is $1,991.287M. Agriculture, Forestry and Fishing ($678.541M), Construction ($260.049M) and Financial & Insurance Services ($183.851M) are the NGA's current economic strengths providing approximately 57% of the regions output. Tourism provides a valuable output of $66.531M to the economy, ranking 7th out of 21 industry categories in overall output to the Alliance region, equating to 3.34% of total economic output.

Table 14. Northern Growth Alliance, Tourism Output Compared to All Industries in $M.

Industry Sector	Northern Growth Alliance	
	$M	%
Agriculture, Forestry & Fishing	$678.541	34.08%
Construction	$260.049	13.06%
Financial & Insurance Services	$183.851	9.23%
Manufacturing	$153.565	7.71%
Mining	$142.496	7.16%
Ownership of Dwellings	$133.429	6.70%
Tourism	$66.531	3.34%
Public Administration & Safety	$50.869	2.55%
Wholesale Trade	$39.646	1.99%
Education & Training	$37.188	1.87%
Retail Trade	$36.688	1.84%
Transport, Postal & Warehousing	$36.188	1.82%
Professional, Scientific & Technical Services	$32.307	1.62%
Rental, Hiring & Real Estate Services	$31.025	1.56%
Administrative & Support Services	$22.980	1.15%
Electricity, Gas, Water & Waste Services	$22.692	1.14%
Other Services	$20.235	1.02%
Health Care & Social Assistance	$13.541	0.68%
Accommodation & Food Services	$12.288	0.62%
Arts & Recreation Services	$11.242	0.56%
Information Media & Telecommunications	$5.938	0.30%
Total	$1,991.287	100.00%

Source: REMPLAN

Economic Output Attributable to Tourism

The economic output attributable to tourism shows the gross revenue in prices generated by businesses and organisations in the NGA to service demand generated by tourists to the area.

The total value of tourism related output for the NGA is estimated at $66.531 million. Accommodation & Food Services ($39.327M), Agriculture, Forestry & Fishing ($6.881M) and Transport, Postal & Warehousing ($5.501M) provide approximately 78% of the economic output attributable to tourism in the Alliance.

Table 15. Northern Growth Alliance, Economic Output Attributable to Tourism in $M.

Industry Sector	Northern Growth Alliance	
	$M	%
Accommodation & Food Services	$39.327	59.11%
Agriculture, Forestry & Fishing	$6.881	10.34%
Transport, Postal & Warehousing	$5.501	8.27%
Ownership of Dwellings	$4.712	7.08%
Retail Trade	$3.305	4.97%
Manufacturing	$2.616	3.93%
Arts & Recreation Services	$1.978	2.97%
Rental, Hiring & Real Estate Services	$0.861	1.29%
Wholesale Trade	$0.815	1.22%
Other Services	$0.226	0.34%
Education & Training	$0.211	0.32%
Information Media & Telecommunications	$0.055	0.08%
Health Care & Social Assistance	$0.043	0.07%
Construction	$0.000	0.00%
Mining	$0.000	0.00%
Financial & Insurance Services	$0.000	0.00%
Professional, Scientific & Technical Services	$0.000	0.00%
Administrative & Support Services	$0.000	0.00%
Public Administration & Safety	$0.000	0.00%
Electricity, Gas, Water & Waste Services	$0.000	0.00%
Total	**$66.531**	**100.00%**

Source: REMPLAN

The above estimates of the value of tourism by industry sector for the NGA are based on ABS estimates of National Tourism Product Output by industry, and the degree to which tourism industry related jobs are located in the NGA. The greater the number of tourism related jobs in an area, the greater the estimated value of tourism in the local economy.

Employment Profile

The employment profile shows the number of employees whose place of work is located within the NGA.

The total employment estimate for the NGA is 4,839 jobs, with Agriculture, Forestry & Fishing (1,809 jobs), Construction (521 jobs) and Tourism (294 jobs) comprising 54.23% of total jobs in the Alliance.

Table 16. Northern Growth Alliance, Tourism Employment Compared to All Industries.

Industry Sector	Northern Growth Alliance	
	Jobs	%
Agriculture, Forestry & Fishing	1,809	37.38%
Construction	521	10.77%
Tourism	294	6.08%
Retail Trade	289	5.97%
Education & Training	277	5.72%
Financial & Insurance Services	222	4.59%
Public Administration & Safety	209	4.32%
Manufacturing	197	4.07%
Mining	155	3.20%
Transport, Postal & Warehousing	131	2.71%
Other Services	127	2.62%
Professional, Scientific & Technical Services	107	2.21%
Administrative & Support Services	101	2.09%
Health Care & Social Assistance	100	2.07%
Wholesale Trade	94	1.94%
Accommodation & Food Services	66	1.36%
Arts & Recreation Services	60	1.24%
Rental, Hiring & Real Estate Services	50	1.03%
Electricity, Gas, Water & Waste Services	24	0.50%
Information Media & Telecommunications	6	0.12%
Ownership of Dwellings	0	0.00%
Total	4,839	100.00%

Source: REMPLAN

Employment Attributable to Tourism

Employment attributable to tourism shows the number of jobs in each industry sector in the NGA which service demand generated by tourists to the area. Accommodation & Food Services (211 jobs), Retail Trade (26 jobs), and Transport, Postal & Warehousing (20 jobs) provide approximately 87.4% of jobs attributable to tourism in the Alliance.

Table 17.   Northern Growth Alliance, Employment Attributable to Tourism by Industry Sector.

Industry Sector	Northern Growth Alliance	
	Jobs	%
Accommodation & Food Services	211	71.77%
Retail Trade	26	8.84%
Transport, Postal & Warehousing	20	6.80%
Agriculture, Forestry & Fishing	18	6.12%
Arts & Recreation Services	10	3.40%
Manufacturing	3	1.02%
Education & Training	2	0.68%
Wholesale Trade	2	0.68%
Other Services	1	0.34%
Rental, Hiring & Real Estate Services	1	0.34%
Health Care & Social Assistance	0	0.00%
Public Administration & Safety	0	0.00%
Administrative & Support Services	0	0.00%
Information Media & Telecommunications	0	0.00%
Financial & Insurance Services	0	0.00%
Construction	0	0.00%
Electricity, Gas, Water & Waste Services	0	0.00%
Mining	0	0.00%
Professional, Scientific & Technical Services	0	0.00%
Ownership of Dwellings	0	0.00%
Total	294	100.00%

Source: REMPLAN

Wages and Salaries Profile

Agriculture, Forestry & Fishing ($68.143M), Construction ($41.706M) and Financial & Insurance Services ($34.655M) have the highest provision of wages and salaries from all industries, encompassing 43.56% of total wages and salaries for the Alliance. Tourism provides total wages and salaries of $14.75M, or 4.44%, of the total of $331.725M.

Table 18. Northern Growth Alliance, Tourism Wages and Salaries Compared to All Industries in $M.

Industry Sector	Northern Growth Alliance	
	$M	%
Agriculture, Forestry & Fishing	$68.143	20.54%
Construction	$41.706	12.57%
Financial & Insurance Services	$34.655	10.45%
Education & Training	$25.414	7.66%
Public Administration & Safety	$24.182	7.29%
Mining	$18.876	5.69%
Manufacturing	$16.620	5.01%
Tourism	$14.730	4.44%
Retail Trade	$14.696	4.43%
Wholesale Trade	$12.236	3.69%
Professional, Scientific & Technical Services	$10.452	3.15%
Administrative & Support Services	$10.085	3.04%
Transport, Postal & Warehousing	$9.201	2.77%
Health Care & Social Assistance	$8.724	2.63%
Other Services	$6.984	2.11%
Rental, Hiring & Real Estate Services	$5.110	1.54%
Electricity, Gas, Water & Waste Services	$3.533	1.06%
Accommodation & Food Services	$3.113	0.94%
Arts & Recreation Services	$2.382	0.72%
Information Media & Telecommunications	$0.881	0.27%
Ownership of Dwellings	$0.000	0.00%
Total	$331.725	100.00%

Source: REMPLAN

Tourism Value-Added Profile

The value-added profile shows the value in prices that is added by industry sectors in the NGA to intermediate inputs.

The total value-added estimate for the NGA is $977.324M, with Agriculture, Forestry & Fishing ($336.365M), Financial & Insurance Services ($137.725M) and Ownership of Dwellings ($103.232M) providing 59% of total value-added to industry. Tourism provides a value-add of $30.304M or 3.1% and ranks 6th out of 21 industries.

Table 19. Northern Growth Alliance, Tourism Value Added Compared to All Industries in $M.

Industry Sector	Northern Growth Alliance	
	$M	%
Agriculture, Forestry & Fishing	$336.365	34.42%
Financial & Insurance Services	$137.725	14.09%
Ownership of Dwellings	$103.232	10.56%
Construction	$79.645	8.15%
Mining	$58.192	5.95%
Tourism	$30.304	3.10%
Public Administration & Safety	$29.216	2.99%
Education & Training	$28.774	2.94%
Manufacturing	$28.251	2.89%
Retail Trade	$22.414	2.29%
Wholesale Trade	$19.732	2.02%
Rental, Hiring & Real Estate Services	$16.355	1.67%
Transport, Postal & Warehousing	$15.670	1.60%
Professional, Scientific & Technical Services	$15.339	1.57%
Electricity, Gas, Water & Waste Services	$12.089	1.24%
Administrative & Support Services	$11.500	1.18%
Other Services	$10.390	1.06%
Health Care & Social Assistance	$10.090	1.03%
Accommodation & Food Services	$5.124	0.52%
Arts & Recreation Services	$4.383	0.45%
Information Media & Telecommunications	$2.535	0.26%
Total	$977.324	100.00%

Source: REMPLAN

Tourist Dollar Distribution

For each dollar spent by a tourist in the NGA, it is estimated that typically $0.59 is spent on Accommodation & Food Services, $0.10 on Agriculture, Forestry & Fishing and $0.08 on Transport, Postal & Warehousing.

Table 20. Northern Growth Alliance, Distribution of Each $1 Spent by a Tourist by Industry Sector.

Industry Sector	Northern Growth Alliance	
	$	%
Accommodation & Food Services	$0.59	59.11%
Agriculture, Forestry & Fishing	$0.10	10.34%
Transport, Postal & Warehousing	$0.08	8.27%
Ownership of Dwellings	$0.07	7.08%
Retail Trade	$0.05	4.97%
Manufacturing	$0.04	3.93%
Arts & Recreation Services	$0.03	2.97%
Rental, Hiring & Real Estate Services	$0.01	1.29%
Wholesale Trade	$0.01	1.22%
Other Services	$0.00	0.34%
Education & Training	$0.00	0.32%
Information Media & Telecommunications	$0.00	0.08%
Health Care & Social Assistance	$0.00	0.07%
Construction	$0.00	0.00%
Mining	$0.00	0.00%
Financial & Insurance Services	$0.00	0.00%
Professional, Scientific & Technical Services	$0.00	0.00%
Administrative & Support Services	$0.00	0.00%
Public Administration & Safety	$0.00	0.00%
Electricity, Gas, Water & Waste Services	$0.00	0.00%
Total	**$1.00**	**100.00%**

Source: REMPLAN

Shire of Chittering

Tourism Output Profile

The total output estimate for the Shire of Chittering is $639.417M, which is approximately 32% of the total output of the NGA.

Consistent with the economic profile of the NGA, the key industry sectors for the Shire of Chittering are Agriculture, Forestry & Fishing ($115.633M), Construction ($106.357M) and Financial & Insurance services ($94.599M). It is important to note that mining provides an economic benefit of $90.868M in the Shire of Chittering. These four key industries provide approximately 63.71% of the Shire's output.

The economic benefit of tourism to the Shire of Chittering is $11.951M and ranks 12th out of 21 industry categories in overall output to the Shire, equating to 1.87%. While tourism follows closely behind Professional, Scientific & Technical Services, and Public Administration & Safety, it provides a considerable growth area dependent on investment in retail, accommodation, cafes and restaurants, cultural and recreational services.

Table 21. Shire of Chittering, Tourism Output Compared to All Industries in $M.

Industry Sector	Shire of Chittering	
	$M	%
Agriculture, Forestry & Fishing	$115.633	18.08%
Construction	$106.357	16.63%
Financial & Insurance Services	$94.599	14.79%
Mining	$90.868	14.21%
Ownership of Dwellings	$48.627	7.60%
Manufacturing	$46.002	7.19%
Transport, Postal & Warehousing	$20.968	3.28%
Wholesale Trade	$18.586	2.91%
Public Administration & Safety	$16.304	2.55%
Professional, Scientific & Technical Services	$14.337	2.24%
Education & Training	$13.611	2.13%
Tourism	$11.951	1.87%
Administrative & Support Services	$9.198	1.44%
Retail Trade	$8.856	1.38%
Other Services	$6.409	1.00%
Rental, Hiring & Real Estate Services	$3.646	0.57%
Information Media & Telecommunications	$3.645	0.57%
Health Care & Social Assistance	$3.239	0.51%
Arts & Recreation Services	$3.047	0.48%
Accommodation & Food Services	$2.604	0.41%
Electricity, Gas, Water & Waste Services	$0.931	0.15%
Total	$639.417	100.00%

Source: REMPLAN

Economic Output Attributable to Tourism

The total value of tourism related output for the Shire of Chittering is estimated at $11.951M. Accommodation & Food Services ($6.062M), Manufacturing ($1.409M) and Agriculture, Forestry & Fishing ($0.947M) provide more than 70% of the total economic output in the Shire of Chittering.

Table 22. Shire of Chittering, Economic Output Attributable to Tourism by Industry Sector in $M.

Industry Sector	Shire of Chittering	
	$M	%
Accommodation & Food Services	$6.062	50.72%
Manufacturing	$1.409	11.79%
Agriculture, Forestry & Fishing	$0.947	7.92%
Transport, Postal & Warehousing	$0.902	7.55%
Retail Trade	$0.793	6.64%
Ownership of Dwellings	$0.721	6.03%
Arts & Recreation Services	$0.459	3.84%
Wholesale Trade	$0.380	3.18%
Rental, Hiring & Real Estate Services	$0.105	0.88%
Education & Training	$0.080	0.67%
Other Services	$0.063	0.53%
Information Media & Telecommunications	$0.025	0.21%
Health Care & Social Assistance	$0.005	0.04%
Construction	$0.000	0.00%
Electricity, Gas, Water & Waste Services	$0.000	0.00%
Mining	$0.000	0.00%
Financial & Insurance Services	$0.000	0.00%
Professional, Scientific & Technical Services	$0.000	0.00%
Administrative & Support Services	$0.000	0.00%
Public Administration & Safety	$0.000	0.00%
Total	$11.951	100.00%

Source: REMPLAN

Employment Profile

The total employment estimate for the Shire of Chittering is 1,390 jobs, with Agriculture, Forestry & Fishing (323 jobs), Construction (197 jobs) and Financial & Insurance Services (114 jobs) providing 45.61% of employment in the Shire.

Of the 1,390 jobs in the Shire, 52 are directly related to tourism, or 3.74%.

Table 23. Shire of Chittering, Tourism Employment Compared to All Industries.

Industry Sector	Shire of Chittering	
	Jobs	%
Agriculture, Forestry & Fishing	323	23.24%
Construction	197	14.17%
Financial & Insurance Services	114	8.20%
Education & Training	101	7.27%
Mining	94	6.76%
Transport, Postal & Warehousing	76	5.47%
Manufacturing	72	5.18%
Retail Trade	70	5.04%
Public Administration & Safety	64	4.60%
Tourism	52	3.74%
Professional, Scientific & Technical Services	47	3.38%
Wholesale Trade	44	3.17%
Other Services	38	2.73%
Administrative & Support Services	33	2.37%
Health Care & Social Assistance	24	1.73%
Accommodation & Food Services	14	1.01%
Arts & Recreation Services	14	1.01%
Rental, Hiring & Real Estate Services	6	0.43%
Electricity, Gas, Water & Waste Services	4	0.29%
Information Media & Telecommunications	3	0.22%
Ownership of Dwellings	0	0.00%
Total	1,390	100.00%

Source: REMPLAN

Employment Attributable to Tourism

Of the 52 jobs directly related to tourism, Accommodation & Food Services (34 jobs), Retail Trade (6 jobs), and Agriculture, Forestry & Fishing (3 jobs) provide approximately 82.7% of jobs attributable to tourism in the Alliance.

Table 24. Shire of Chittering, Employment Attributable to Tourism by Industry Sector.

Industry Sector	Shire of Chittering	
	Jobs	%
Accommodation & Food Services	34	65.38%
Retail Trade	6	11.54%
Agriculture, Forestry & Fishing	3	5.77%
Transport, Postal & Warehousing	3	5.77%
Arts & Recreation Services	2	3.85%
Manufacturing	2	3.85%
Education & Training	1	1.92%
Wholesale Trade	1	1.92%
Health Care & Social Assistance	0	0.00%
Public Administration & Safety	0	0.00%
Administrative & Support Services	0	0.00%
Professional, Scientific & Technical Services	0	0.00%
Information Media & Telecommunications	0	0.00%
Financial & Insurance Services	0	0.00%
Other Services	0	0.00%
Construction	0	0.00%
Electricity, Gas, Water & Waste Services	0	0.00%
Mining	0	0.00%
Rental, Hiring & Real Estate Services	0	0.00%
Ownership of Dwellings	0	0.00%
Total	52	100.00%

Source: REMPLAN

Wages and Salaries Profile

The total wages and salaries for the Shire of Chittering is $115.180M. Of this, Financial & Insurance Services ($17.747M), Construction ($17.124M) and Mining ($11.809M) have the highest overall provision of wages and salaries from all industries for the Shire.

Tourism provides a total of $2.712M of the total wages and salaries, which equates to approximately $52,154 per person employed in the tourism industry.

Table 25. Shire of Chittering, Tourism Wages and Salaries Compared to All Industries in $M.

Industry Sector	Shire of Chittering	
	$M	%
Financial & Insurance Services	$17.747	15.41%
Construction	$17.124	14.87%
Mining	$11.809	10.25%
Agriculture, Forestry & Fishing	$11.152	9.68%
Education & Training	$9.309	8.08%
Public Administration & Safety	$7.762	6.74%
Manufacturing	$5.975	5.19%
Wholesale Trade	$5.736	4.98%
Transport, Postal & Warehousing	$5.331	4.63%
Professional, Scientific & Technical Services	$4.723	4.10%
Administrative & Support Services	$4.232	3.67%
Retail Trade	$3.547	3.08%
Other Services	$2.880	2.50%
Tourism	$2.712	2.35%
Health Care & Social Assistance	$2.111	1.83%
Accommodation & Food Services	$0.672	0.58%
Arts & Recreation Services	$0.670	0.58%
Rental, Hiring & Real Estate Services	$0.601	0.52%
Information Media & Telecommunications	$0.587	0.51%
Electricity, Gas, Water & Waste Services	$0.500	0.43%
Ownership of Dwellings	$0.000	0.00%
Total	$115.180	100.00%

Source: REMPLAN

Value Add Profile

The total value-added estimate for the Shire of Chittering is $317.942M. Financial & Insurance Services ($70.957M), Agriculture, Forestry & Fishing ($57,046M), and Ownership of Dwellings ($37.622M) provide approximately 52% of the total value-added to industry.

Tourism provides a value-add of $5.282M or 1.66% and ranks 13th out of 21 industries.

Table 26. Shire of Chittering, Tourism Value Added Compared to All Industries in $M.

Industry Sector	Shire of Chittering	
	$M	%
Financial & Insurance Services	$70.957	22.32%
Agriculture, Forestry & Fishing	$57.046	17.94%
Ownership of Dwellings	$37.622	11.83%
Mining	$35.656	11.21%
Construction	$32.917	10.35%
Education & Training	$10.535	3.31%
Manufacturing	$10.128	3.19%
Public Administration & Safety	$9.475	2.98%
Wholesale Trade	$9.250	2.91%
Transport, Postal & Warehousing	$9.081	2.86%
Professional, Scientific & Technical Services	$6.902	2.17%
Retail Trade	$5.410	1.70%
Tourism	$5.282	1.66%
Administrative & Support Services	$4.775	1.50%
Other Services	$4.081	1.28%
Health Care & Social Assistance	$2.428	0.76%
Rental, Hiring & Real Estate Services	$1.922	0.60%
Information Media & Telecommunications	$1.593	0.50%
Accommodation & Food Services	$1.097	0.35%
Arts & Recreation Services	$1.036	0.33%
Electricity, Gas, Water & Waste Services	$0.748	0.24%
Total	$317.942	100.00%

Source: REMPLAN

Tourist Dollar Distribution

For each dollar spent by a tourist in the Shire of Chittering, it is estimated that typically $0.51 is spent on Accommodation & Food Services, $0.12 is spent on Manufacturing, and $0.08 is spent on Agriculture, Forestry & Fishing.

Table 27. Shire of Chittering, Distribution of Each $1 Spent by a Tourist by Industry Sector.

Industry Sector	Shire of Chittering	
	$	%
Accommodation & Food Services	$0.51	50.72%
Manufacturing	$0.12	11.79%
Agriculture, Forestry & Fishing	$0.08	7.92%
Transport, Postal & Warehousing	$0.08	7.55%
Retail Trade	$0.07	6.64%
Ownership of Dwellings	$0.06	6.03%
Arts & Recreation Services	$0.04	3.84%
Wholesale Trade	$0.03	3.18%
Rental, Hiring & Real Estate Services	$0.01	0.88%
Education & Training	$0.01	0.67%
Other Services	$0.01	0.53%
Information Media & Telecommunications	$0.00	0.21%
Health Care & Social Assistance	$0.00	0.04%
Construction	$0.00	0.00%
Electricity, Gas, Water & Waste Services	$0.00	0.00%
Mining	$0.00	0.00%
Financial & Insurance Services	$0.00	0.00%
Professional, Scientific & Technical Services	$0.00	0.00%
Administrative & Support Services	$0.00	0.00%
Public Administration & Safety	$0.00	0.00%
Total	$1.00	100.00%

Source: REMPLAN

Key Tourism Metrics

Due to the low numbers captured by TRA, the estimates are deemed not reliable and therefore not available for the Shire of Chittering.

Statistical Trends

Due to the change in methodology from 2014, reliable data for the Shire of Chittering is only available from 2008 until 2013 in international and domestic overnight visitor trends. Capture of the domestic day market is reported and reflects the current tourism trend in the Shire of Chittering.

International visitation to the Shire of Chittering increased from 1,343 in 2009 to 1,675 in 2010, however decreased to 1,236 in 2013 (Table 28).

Table 28. Shire of Chittering, International Visitor Trend, 2008 - 2016

International Visitors	Chittering (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	np	np	np	np	np	np	np	np	np
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	np	1,310	1,489	1,273	1,087	np	np	np	np
Business	-	-	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	1,140	1,343	1,675	1,485	1,268	1,236	np	np	np
Unaccompanied traveller	np	np	np	np	np	np	np	np	np
Adult couple	np	np	np	np	np	np	np	np	np
Family group - parent(s) and children	np	np	np	np	np	np	np	np	np
Friends or relatives travelling together - with or without children	np	np	np	np	np	np	np	np	np
Business associates travelling together with or without spouses -	np	-	-	np	np	np	np	-	-
Total	1,140	1,343	1,675	1,485	1,268	1,236	np	np	np
Hotels and similar accommodation	np	np	np	-	-	-	-	-	-
Friends or relatives property	np	np	np	np	np	np	np	np	np
Caravan park or commercial camping ground	np	np	np	np	np	np	np	np	np
Backpacker or hostel	-	-	-	-	-	-	-	-	-
Guest house or Bed & Breakfast - Other Accommodation	np	np	np	np	np	np	np	np	np
Own property (e.g. holiday house)	np	np	np	np	np	np	np	np	np
Total	1,140	1,343	1,675	1,485	1,268	1,236	np	np	np

Source: Tourism Research Australia

International visitor nights increased from 9,871 in 2008 to 29,414 (297%) in 2011. This was followed by a decrease in room nights of 3,228 (12%) to 26,186 in 2012 before increasing to 29,237 in 2013 (Table 29).

Table 29. Shire of Chittering, International Visitor Nights, 2008 - 2016

International Visitor Nights	Chittering (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	np	np	np	np	np	np	np	np	np
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	np	12,323	15,182	14,610	11,543	np	np	np	np
Business	-	-	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	9,871	12,485	29,099	29,414	26,186	29,237	np	np	np
Unaccompanied traveller	np	np	np	np	np	np	np	np	np
Adult couple	np	np	np	np	np	np	np	np	np
Family group - parent(s) and children	np	np	np	np	np	np	np	np	np
Friends or relatives travelling together - with or without children	np	np	np	np	np	np	np	np	np
Business associates travelling together with or without spouses -	np	-	-	np	np	np	np	-	-
Total	9,871	12,485	29,099	29,414	26,186	29,237	np	np	np
Hotels and similar accommodation	np	np	np	-	-	-	-	-	-
Friends or relatives property	np	np	np	np	np	np	np	np	np
Caravan park or commercial camping ground	np	np	np	np	np	np	np	np	np
Backpacker or hostel	-	-	-	-	-	-	-	-	-
Guest house or Bed & Breakfast - Other Accommodation	np	np	np	np	np	np	np	np	np
Own property (e.g. holiday house)	np	np	np	np	np	np	np	np	np
Total	9,871	12,485	29,099	29,414	26,186	29,237	np	np	np

Source: Tourism Research Australia

Domestic overnight visitor trend and nights data for the Shire of Chittering have been largely non reliable from 2011 until 2018 as outlined in Tables 30 and 31.

Table 30. Shire of Chittering, Domestic Overnight Visitor Trend, 2008 - 2016

Domestic Overnight Visitors (000)	Chittering (S)								
	2005-08	2006-09	2007-10	2008-11	2009-12	2010-13	2011-14	2012-15	2013-16
Holiday	np	np	np	np	np	np	np	np	np
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	16	16	np	np	np	np	np	np	np
Business	np	np	np	np	np	np	np	np	np
Other reason	np	np	np	np	-	-	-	np	np
Total	21	20	16	np	np	np	np	np	np
Travelling alone	np	np	np	np	np	np	np	np	np
Adult couple	np	np	np	np	np	np	np	np	np
Family group - parents and children	np	np	np	np	np	np	np	np	np
Friends or relatives travelling together - with or without children	np	np	np	np	np	np	np	np	np
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	np
Total	21	20	16	np	np	np	np	np	np
Hotel/resort/motel or motor Inn	np	np	np	-	-	-	np	np	-
Friends or relatives property	np	np	np	np	np	np	np	np	np
Caravan park or commercial camping ground	np	-	-	-	-	-	np	np	-
Backpacker or hostel	-	-	-	-	-	-	-	-	-
Guest house or Bed & Breakfast - Other Accommodation	np	np	np	np	np	np	np	np	np
Not Stated/Not Asked	np	np	np	np	np	np	np	np	np
Total	21	20	16	np	np	np	np	np	np

Source: Tourism Research Australia

Table 31. Shire of Chittering, Domestic Overnight Visitor Nights, 2008 - 2016

Domestic Overnight Nights (000)	Chittering (S)								
	2005-08	2006-09	2007-10	2008-11	2009-12	2010-13	2011-14	2012-15	2013-16
Holiday	np	np	np	np	np	np	np	np	np
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	31	32	np	np	np	np	np	np	np
Business	np	np	np	np	np	np	np	np	np
Other reason	np	np	np	np	-	-	-	np	np
Total	57	41	32	np	np	np	np	np	np
Travelling alone	np	np	np	np	np	np	np	np	np
Adult couple	np	np	np	np	np	np	np	np	np
Family group - parents and children	np	np	np	np	np	np	np	np	np
Friends or relatives travelling together - with or without children	np	np	np	np	np	np	np	np	np
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	np
Total	57	41	32	np	np	np	np	np	np
Hotel/resort/motel or motor Inn	np	np	np	-	-	-	np	np	-
Friends or relatives property	np	np	np	np	np	np	np	np	np
Caravan park or commercial camping ground	np	-	-	-	-	-	np	np	-
Backpacker or hostel	-	-	-	-	-	-	-	-	-
Guest house or Bed & Breakfast - Other Accommodation	np	np	np	np	np	np	np	np	np
Not Stated/Not Asked	np	np	np	np	np	np	np	np	np
Total	57	41	32	np	np	np	np	np	np

Source: Tourism Research Australia

Domestic day visitation has seen a steady increase between 2009 and 2016. Despite an initial decrease in visitation between 2008 (83,000) and 2010 (72,000), domestic day visitation has increased to 136,000 in 2016 (Table 32).

Table 32. Shire of Chittering, Domestic Day Visitor Trend, 2008 - 2016

Domestic Day Visitors (000)	Chittering (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	np	np	np	np	np	np	np	np	np
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	74	68	65	73	72	93	98	103	110
Business	np	np	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	83	75	72	79	82	111	128	133	136

Source: Tourism Research Australia

Tourism Growth Scenarios

Building scenarios for visitation growth for the Shire of Chittering has proved challenging due to statistical data either being not available or unreliable through TRA. To provide relative numbers, an average of the increase in visitation for the Shires of Gingin and Dandaragan for the years 2014 – 2016 has been applied to the Shire of Chittering. Two scenarios are provided below, Scenario 1 providing a 10% increase in visitor numbers and Scenario 2 providing a 20% increase in visitor numbers for each of the sectors (Domestic Day, Domestic Overnight, International).

Table 33. Shire of Chittering, Scenario 1 – 10% Increase in Visitor Numbers.

Direct Impact	Domestic Day	Domestic Overnight	International	Total
Number of Visitors	13,600	11,600	4,359	29,559
Number of Nights	n/a	1.00	1.00	
Estimated Expenditure per Visitor ($)	$97	$231	$85	
Total Estimated Expenditure ($)	$1,319,200	$2,679,600	$370,515	$4,369,315

Source: REMPLAN

Providing an increase of 10% in visitor numbers for each of the sectors with no change to the number of nights or estimated expenditure per visitor ($) provides an additional $4.369M in economic benefit to the Shire of Chittering (Table 33), a direct increase in output of $13.425M, 19 additional jobs, $0.992M in wages and salaries and a boost in value-added of $1.931M.

Table 34. Shire of Chittering, Scenario 2 – 20% Increase in Visitor Numbers.

Direct Impact	Domestic Day	Domestic Overnight	International	Total
Number of Visitors	27,200	43,500	8,680	79,380
Number of Nights	n/a	1.00	1.00	
Estimated Expenditure per Visitor ($)	$97	$231	$85	
Total Estimated Expenditure ($)	$2,638,400	$10,048,500	$737,800	$13,424,700

Source: REMPLAN

An additional 20% in visitor numbers for each of the sectors with no change to the number of nights or estimated expenditure per visitor ($) provides an additional $13.424M in economic benefit to the Shire of Chittering (Table 34), 60 additional jobs, $2.972M in wages and salaries and a boost in value-added of $6.115M.

Shire of Dandaragan

Tourism Output Profile

The total output estimate for the Shire of Dandaragan is $574.62M, which is approximately 29% of the total output for the NGA.

Agriculture, Forestry & Fishing ($182.143M), Financial & Insurance Services ($80.232M) and Construction ($67.043M) are the Shires' current economic strengths providing approximately 57.33% of the Shire's output.

Tourism provides an output of $24.801M to the economy, ranking 7th out of the 21 industry categories in overall output, or 4.32% of total economic output.

Table 35. Shire of Dandaragan, Tourism Output Compared to All Industries in $M.

Industry Sector	Shire of Dandaragan	
	$M	%
Agriculture, Forestry & Fishing	$182.143	31.70%
Financial & Insurance Services	$80.232	13.96%
Construction	$67.043	11.67%
Mining	$36.003	6.27%
Manufacturing	$33.325	5.80%
Ownership of Dwellings	$33.093	5.76%
Tourism	$24.801	4.32%
Electricity, Gas, Water & Waste Services	$16.448	2.86%
Public Administration & Safety	$15.773	2.74%
Retail Trade	$13.861	2.41%
Rental, Hiring & Real Estate Services	$12.778	2.22%
Education & Training	$12.656	2.20%
Wholesale Trade	$7.435	1.29%
Transport, Postal & Warehousing	$6.678	1.16%
Professional, Scientific & Technical Services	$6.366	1.11%
Accommodation & Food Services	$6.277	1.09%
Other Services	$5.890	1.03%
Health Care & Social Assistance	$5.756	1.00%
Arts & Recreation Services	$5.147	0.90%
Administrative & Support Services	$2.915	0.51%
Information Media & Telecommunications	$0.000	0.00%
Total	$574.620	100.00%

Source: REMPLAN

Economic Output Attributable to Tourism

The total value of tourism output in the Shire of Dandaragan is $24.803M. Accommodation & Food Services ($17.698M), Ownership of Dwellings ($2.116M) and Retail Trade ($1.247M) provide approximately 85% of the economic output attributable to tourism across all industries.

Table 36. Shire of Dandaragan, Economic Output Attributable to Tourism by Industry Sector in $M.

Industry Sector	Shire of Dandaragan	
	$M	%
Accommodation & Food Services	$17.698	71.36%
Ownership of Dwellings	$2.116	8.53%
Retail Trade	$1.247	5.03%
Agriculture, Forestry & Fishing	$1.066	4.30%
Arts & Recreation Services	$1.062	4.28%
Transport, Postal & Warehousing	$0.721	2.91%
Rental, Hiring & Real Estate Services	$0.352	1.42%
Manufacturing	$0.305	1.23%
Wholesale Trade	$0.151	0.61%
Other Services	$0.066	0.27%
Health Care & Social Assistance	$0.017	0.07%
Information Media & Telecommunications	$0.002	0.01%
Construction	$0.000	0.00%
Mining	$0.000	0.00%
Financial & Insurance Services	$0.000	0.00%
Professional, Scientific & Technical Services	$0.000	0.00%
Administrative & Support Services	$0.000	0.00%
Public Administration & Safety	$0.000	0.00%
Education & Training	$0.000	0.00%
Electricity, Gas, Water & Waste Services	$0.000	0.00%
Total	$24.803	100.00%

Source: REMPLAN

Employment Profile

The total employment estimate for the Shire of Dandaragan is 1,455 jobs. Agriculture, Forestry & Fishing (499 jobs), Construction (144 jobs) and Tourism (120 jobs) are the top three employment industries in the Shire providing employment to approximately 52.45% of people employed in the Shire. Other key industries include Retail Trade (109 jobs), Financial & Insurance Services (95 jobs), Education & Training (93 jobs), and Public Administration & Safety (64 jobs).

Table 37. Shire of Dandaragan, Tourism Employment Compared to All Industries.

Industry Sector	Shire of Dandaragan	
	Jobs	%
Agriculture, Forestry & Fishing	499	34.30%
Construction	144	9.90%
Tourism	120	8.25%
Retail Trade	109	7.49%
Financial & Insurance Services	95	6.53%
Education & Training	93	6.39%
Public Administration & Safety	64	4.40%
Health Care & Social Assistance	43	2.96%
Other Services	37	2.54%
Mining	34	2.34%
Accommodation & Food Services	34	2.34%
Arts & Recreation Services	31	2.13%
Manufacturing	28	1.92%
Administrative & Support Services	27	1.86%
Transport, Postal & Warehousing	24	1.65%
Professional, Scientific & Technical Services	21	1.44%
Rental, Hiring & Real Estate Services	20	1.37%
Wholesale Trade	18	1.24%
Electricity, Gas, Water & Waste Services	14	0.96%
Information Media & Telecommunications	0	0.00%
Ownership of Dwellings	0	0.00%
Total	1,455	100.00%

Source: REMPLAN

Employment Attributable to Tourism

Employment attributable to tourism shows the number of jobs in each industry sector in the Shire of Dandaragan which service demand generated by tourists to the area. Accommodation & Food Services (96 jobs), Retail Trade (10 jobs), and Arts & Recreation Services (7 jobs) provide over 94% of jobs attributable to tourism in the Shire.

Table 38. Shire of Dandaragan, Employment Attributable to Tourism by Industry Sector.

Industry Sector	Shire of Dandaragan	
	Jobs	%
Accommodation & Food Services	96	80.00%
Retail Trade	10	8.33%
Arts & Recreation Services	7	5.83%
Agriculture, Forestry & Fishing	3	2.50%
Transport, Postal & Warehousing	3	2.50%
Rental, Hiring & Real Estate Services	1	0.83%
Health Care & Social Assistance	0	0.00%
Education & Training	0	0.00%
Public Administration & Safety	0	0.00%
Administrative & Support Services	0	0.00%
Professional, Scientific & Technical Services	0	0.00%
Information Media & Telecommunications	0	0.00%
Other Services	0	0.00%
Wholesale Trade	0	0.00%
Construction	0	0.00%
Electricity, Gas, Water & Waste Services	0	0.00%
Manufacturing	0	0.00%
Mining	0	0.00%
Financial & Insurance Services	0	0.00%
Ownership of Dwellings	0	0.00%
Total	120	100.00%

Source: REMPLAN

Wages and Salaries Profile

The total wages and salaries for the Shire of Dandaragan is $94.151M. Of this, Agriculture, Forestry & Fishing ($16.252M), Financial & Insurance Services ($14.427M) and Construction ($10.517M) have the highest overall provision of wages and salaries from all industries for the Shire.

Tourism provides a total of $5.654M of the total wages and salaries, which equates to approximately $47,116 per person employed in the tourism industry.

Table 39. Shire of Dandaragan, Tourism Wages and Salaries Compared to All Industries in $M.

Industry Sector	Shire of Dandaragan	
	$M	%
Agriculture, Forestry & Fishing	$16.252	17.26%
Financial & Insurance Services	$14.427	15.32%
Construction	$10.517	11.17%
Education & Training	$8.726	9.27%
Public Administration & Safety	$7.455	7.92%
Tourism	$5.654	6.01%
Retail Trade	$5.552	5.90%
Mining	$4.521	4.80%
Health Care & Social Assistance	$3.805	4.04%
Wholesale Trade	$2.295	2.44%
Electricity, Gas, Water & Waste Services	$2.189	2.33%
Rental, Hiring & Real Estate Services	$2.105	2.24%
Professional, Scientific & Technical Services	$2.074	2.20%
Transport, Postal & Warehousing	$1.698	1.80%
Manufacturing	$1.684	1.79%
Other Services	$1.647	1.75%
Accommodation & Food Services	$1.600	1.70%
Arts & Recreation Services	$1.044	1.11%
Administrative & Support Services	$0.905	0.96%
Information Media & Telecommunications	$0.000	0.00%
Ownership of Dwellings	$0.000	0.00%
Total	$94.151	100.00%

Source: REMPLAN

Value Add Profile

The value-added profile shows the value in prices that is added by industry sectors in the Shire of Dandaragan to intermediate inputs.

The total value-added for the Shire of Dandaragan is $279.782M, with Agriculture, Forestry & Fishing ($79.941M), Financial & Insurance Services ($60.858M), and Ownership of Dwellings ($25.604M) providing approximately 60% of total value-added to industry.

Tourism provides a value-add of $11.397M or 4.07% and ranks 6th out of 21 industry categories.

Table 40. Shire of Dandaragan, Tourism Value Added Compared to All Industries in $M.

Industry Sector	Shire of Dandaragan	
	$M	%
Agriculture, Forestry & Fishing	$79.941	28.57%
Financial & Insurance Services	$60.858	21.75%
Ownership of Dwellings	$25.604	9.15%
Construction	$20.071	7.17%
Mining	$13.131	4.69%
Tourism	$11.397	4.07%
Education & Training	$9.829	3.51%
Public Administration & Safety	$8.946	3.20%
Retail Trade	$8.468	3.03%
Electricity, Gas, Water & Waste Services	$8.068	2.88%
Rental, Hiring & Real Estate Services	$6.736	2.41%
Health Care & Social Assistance	$4.349	1.55%
Manufacturing	$4.124	1.47%
Wholesale Trade	$3.701	1.32%
Professional, Scientific & Technical Services	$3.039	1.09%
Transport, Postal & Warehousing	$2.890	1.03%
Accommodation & Food Services	$2.626	0.94%
Other Services	$2.575	0.92%
Arts & Recreation Services	$2.296	0.82%
Administrative & Support Services	$1.131	0.40%
Information Media & Telecommunications	$0.000	0.00%
Total	$279.782	100.00%

Source: REMPLAN

Tourist Dollar Distribution

For each dollar spent by a tourist in the Shire of Dandaragan, it is estimated that typically $0.71 is spent on Accommodation & Food Services, $0.09 is spent on Ownership of Dwellings, and $0.05 is spent on Retail Trade.

Table 41. Shire of Dandaragan, Distribution of Each $1 Spent by a Tourist by Industry Sector.

Industry Sector	Shire of Dandaragan	
	$	%
Accommodation & Food Services	$0.71	71.36%
Ownership of Dwellings	$0.09	8.53%
Retail Trade	$0.05	5.03%
Agriculture, Forestry & Fishing	$0.04	4.30%
Arts & Recreation Services	$0.04	4.28%
Transport, Postal & Warehousing	$0.03	2.91%
Rental, Hiring & Real Estate Services	$0.01	1.42%
Manufacturing	$0.01	1.23%
Wholesale Trade	$0.01	0.61%
Other Services	$0.00	0.27%
Health Care & Social Assistance	$0.00	0.07%
Information Media & Telecommunications	$0.00	0.01%
Construction	$0.00	0.00%
Mining	$0.00	0.00%
Financial & Insurance Services	$0.00	0.00%
Professional, Scientific & Technical Services	$0.00	0.00%
Administrative & Support Services	$0.00	0.00%
Public Administration & Safety	$0.00	0.00%
Education & Training	$0.00	0.00%
Electricity, Gas, Water & Waste Services	$0.00	0.00%
Total	$1.00	100.00%

Source: REMPLAN

Visitation Profile

Key Tourism Metrics - 2017

Data collected by TRA for the calendar year and outlined in Table 42 indicates the Shire of Dandaragan received 312,000 visitors, with 22,000 (7%) from the international market, 163,000 (52.2%) from the domestic overnight market, and 127,000 (40.7%) from the domestic day market. The average length of stay for the international market was two nights, with an average spend per trip of $312, average spend per night of $142, and total economic benefit of $6.816M. The average length of stay for the domestic overnight market was three nights with an average spend per trip of $382, average spend per night of $136 and total economic benefit of $62.56M. The domestic day visitors spend on average $113 per trip, generating a total economic benefit of $14.361M. The overall economic benefit of tourism to the Shire of Dandaragan for 2017 was $83.727M, an increase of over $12M from 2016 from $71.430M (Table 42).

Table 42. Shire of Dandaragan, Key Tourism Metrics Local Government Area Dandaragan, 2017.

	International	Domestic Overnight	Domestic Day	Total
Visitors	22,000	163,000	127,000	312,000
Nights	48,000	460,000	-	508,000
Average stay (nights)	2	3	-	3
Average spend per trip ($)	$ 312	$ 382	$ 113	$ 132
Average spend per night ($)	$ 142	$ 136	-	$ 108
Average spend (commercial accommodation) per night ($)	$ 170	$ 198	-	$ 124
Economic Benefit	**$6,816,000**	**$62,560,000**	**$14,351,000**	**$83,727,000**

Source: Tourism Research Australia

The top three international markets for 2017 were Germany with 4,000 visitors generating 6,000 nights, the UK with 4,000 visitors generating 8,000 nights, and Singapore (Table 43).

Table 43. Shire of Dandaragan, Top International Markets, 2017.

Country of Residence	Visitors ('000)	Nights ('000)
Germany	4	6
United Kingdom	4	8
Singapore	np	np

Source: Tourism Research Australia

Key Tourism Metrics - 2008 - 2016

International visitation to the Shire of Dandaragan remained steady between 2008 and 2015 however saw an increase in visitation of approximately 21%, from 15,857 in 2015 to 19,412 in 2016. This was reflected in all traveller groups, from unaccompanied travellers to friends or relatives travelling together without children. While hotels and caravan parks recorded a steady increase in visitor numbers, the largest increase in number was in the Guest house or Bed & Breakfast category which more than doubled over the 10 year period (Table 44).
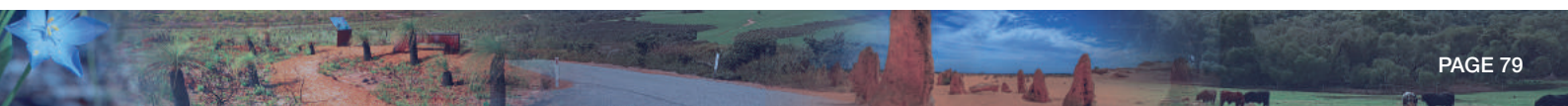
Table 44. Shire of Dandaragan, International Visitor Trend, 2008 – 2016.

International Visitors	Dandaragan (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	14,762	15,474	15,265	15,174	15,639	15,612	15,626	15,359	18,772
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	15,044	15,678	15,505	15,476	15,945	15,985	15,955	15,639	19,039
Business	np	np	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	15,324	15,877	15,729	15,721	16,143	16,184	16,096	15,857	19,412
Unaccompanied traveller	4,029	3,879	4,156	4,466	4,949	5,314	5,262	5,127	5,933
Adult couple	8,088	8,788	8,822	8,155	7,923	7,509	7,194	7,097	8,215
Family group - parent(s) and children	1,548	1,493	1,196	1,275	1,266	1,375	1,670	1,806	2,545
Friends or relatives travelling together - with or without children	1,615	1,672	1,485	1,700	1,888	1,832	1,840	1,754	2,682
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	np
Total	15,324	15,877	15,729	15,721	16,143	16,184	16,096	15,857	19,412
Hotels and similar accommodation	4,346	4,657	4,638	4,394	4,230	4,070	3,843	4,089	5,809
Friends or relatives property	np	np	np	np	np	np	np	np	np
Caravan park or commercial camping ground	6,545	6,999	6,929	7,326	7,536	7,794	7,955	6,878	7,693
Backpacker or hostel	2,108	1,926	1,839	1,606	1,629	1,364	1,124	np	np
Guest house or Bed & Breakfast - Other Accommodation	2,033	2,075	2,031	2,040	2,323	2,398	2,685	3,577	4,512
Own property (e.g. holiday house)	np	np	np	np	np	np	np	np	np
Total	15,324	15,877	15,729	15,721	16,143	16,184	16,096	15,857	19,412

Source: Tourism Research Australia

International visitor nights increased by 55% from 25,318 in 2008 to 39,298 in 2013 before decreasing to 37,197 in 2014. Between 2014 and 2016, international visitor nights increased by approximately 26% to 46,976. Reflecting the increase in visitor nights in Guest house or Bed & Breakfast was the increase in room nights in this category, from 4,511 room nights in 2008 to 18,696 room nights in 2016. This also represents an increase in length of stay from 2 nights in 2008 to 4 nights in 2016 (Table 45).

Table 45. Shire of Dandaragan, International Visitor Nights, 2008 – 2016.

International Visitor Nights	Dandaragan (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	21,059	22,327	22,336	24,961	26,941	28,418	28,945	27,622	36,015
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	22,501	23,628	25,639	29,805	31,215	33,216	31,707	30,370	38,665
Business	np	np	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	25,318	26,206	29,193	33,164	34,476	39,298	37,197	38,309	46,976
Unaccompanied traveller	8,011	8,669	12,024	14,147	14,928	13,714	11,183	13,769	19,581
Adult couple	11,846	12,872	13,276	13,394	12,638	18,509	18,297	17,859	19,429
Family group - parent(s) and children	3,061	2,050	1,828	1,830	1,753	1,948	2,013	2,239	3,500
Friends or relatives travelling together - with or without children	2,356	2,570	1,996	3,609	4,944	4,840	5,441	4,294	4,393
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	np
Total	25,318	26,206	29,193	33,164	34,476	39,298	37,197	38,309	46,976
Hotels and similar accommodation	5,547	5,992	5,888	5,574	5,440	5,190	5,050	5,505	7,963
Friends or relatives property	np	np	np	np	np	np	np	np	np
Caravan park or commercial camping ground	9,283	10,377	10,377	11,385	11,848	12,377	13,448	12,409	13,527
Backpacker or hostel	4,126	2,905	3,295	2,900	2,888	2,386	1,481	np	np
Guest house or Bed & Breakfast - Other Accommodation	4,511	5,182	5,931	7,778	9,335	12,515	11,971	14,511	18,696
Own property (e.g. holiday house)	np	np	np	np	np	np	np	np	np
Total	25,318	26,206	29,193	33,164	34,476	39,298	37,197	38,309	46,976

Source: Tourism Research Australia

The national visitor trend recorded a steady increase in visitor numbers from 87,000 in 2008 to 150,000 in 2016. The largest increase in travelling groups was in Friends or Relatives Travelling Together recording an increase of 277% from 18,000 in 2008 to 50,000 in 2016, and those staying in Guest House or Bed & Breakfast, from 33,000 in 2008 to 81,000 in 2016 (Table 46).

Table 46. Shire of Dandaragan, Domestic Overnight Visitor Trend, 2008 – 2016.

Domestic Overnight Visitors (000)	Dandaragan (S)								
	2005-08	2006-09	2007-10	2008-11	2009-12	2010-13	2011-14	2012-15	2013-16
Holiday	59	55	58	61	71	80	96	106	107
Visiting friends and relatives	14	14	13	12	11	11	21	26	27
Sub-Total Leisure	73	70	72	73	82	91	117	132	134
Business	np	np	np	np	np	np	np	np	np
Other reason	np	np	np	np	np	np	np	np	np
Total	87	82	82	84	95	102	128	149	150
Travelling alone	np	11	np	np	np	np	np	np	np
Adult couple	26	27	27	27	27	30	31	37	40
Family group - parents and children	25	22	21	22	24	28	39	43	37
Friends or relatives travelling together - with or without children	18	18	19	23	32	32	41	47	50
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	np
Total	87	82	82	84	95	102	128	149	150
Hotel/resort/motel or motor Inn	np	np	np	np	np	np	np	np	np
Friends or relatives property	19	21	18	20	18	20	30	33	38
Caravan park or commercial camping ground	19	20	21	21	25	24	36	45	45
Backpacker or hostel	-	-	-	np	np	np	np	np	np
Guest house or Bed & Breakfast - Other Accommodation	33	30	35	33	40	45	47	57	81
Not Stated/Not Asked	np	np	np	np	np	np	np	np	np
Total	87	82	82	84	95	102	128	149	150

Source: Tourism Research Australia

The Domestic Overnight Nights reflects the trend of the Domestic Overnight Visitors, increasing from 293,000 in 2008 to 427,000 in 2016 (Table 47).

Table 47. Shire of Dandaragan, Domestic Overnight Visitor Nights, 2008 – 2016.

Domestic Overnight Nights (000)	Dandaragan (S)								
	2005-08	2006-09	2007-10	2008-11	2009-12	2010-13	2011-14	2012-15	2013-16
Holiday	215	212	223	208	194	211	263	296	310
Visiting friends and relatives	36	36	34	34	36	37	68	71	66
Sub-Total Leisure	250	248	257	242	230	248	331	367	376
Business	np	np	np	np	np	np	np	np	np
Other reason	np	np	np	np	np	np	np	np	np
Total	293	282	281	260	256	272	359	397	427
Travelling alone	np	27	np	np	np	np	np	np	np
Adult couple	98	111	114	102	76	85	103	113	126
Family group - parents and children	92	80	80	75	69	72	105	124	111
Friends or relatives travelling together - with or without children	54	49	48	54	72	75	96	103	114
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	np
Total	293	282	281	260	256	272	359	397	427
Hotel/resort/motel or motor Inn	np	np	np	np	np	np	np	np	np
Friends or relatives property	69	73	71	76	53	65	104	103	119
Caravan park or commercial camping ground	57	65	65	53	68	64	106	133	132
Backpacker or hostel	-	-	-	np	np	np	np	np	np
Guest house or Bed & Breakfast - Other Accommodation	133	125	135	118	115	122	121	136	236
Not Stated/Not Asked	np	np	np	np	np	np	np	np	np
Total	293	282	281	260	256	272	359	397	427

Source: Tourism Research Australia

The high number of visitors staying in Guest houses or Bed & Breakfast – Other Accommodation is reflective of the high number of short stay accommodation venues in the Shire of Dandaragan and the low number of hotel or motel rooms available.

The Domestic Day Visitation has increased from 50,000 visitors in 2008 to 114,000 visitors in 2016. This is due to the increase in visitors to the Pinnacles, adventure tourists for activities such as skydive, and events such as triathlon (Table 48).

Table 48. Shire of Dandaragan, Domestic Day Visitor Trend, 2008 – 2016.

Domestic Day Visitors	Dandaragan (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	np	np	np	np	np	np	np	np	90
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	44	47	np	np	71	77	83	93	104
Business	np	np	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	50	53	52	67	86	91	101	106	114

Source: Tourism Research Australia

Tourism Growth Scenarios

With tourism ranked 7th in the industry sector there is still opportunity for the numbers of tourists to increase across all sectors – international, domestic overnight and domestic day visitors.

Two scenarios are provided below, Scenario 1 providing a 10% increase in visitor numbers and Scenario 2 providing a 20% increase in visitor numbers for each of the sectors (Domestic Day, Domestic Overnight, International).

Table 49. Shire of Dandaragan, Scenario 1 – 10% Increase in Visitor Numbers.

Direct Impact	Domestic Day	Domestic Overnight	International	Total
Number of Visitors	11,400	210,000	24,700	246,100
Number of Nights	n/a	1.00	1.00	
Estimated Expenditure per Visitor ($)	$113	$124	$118	
Total Estimated Expenditure ($)	$1,288,200	$26,040,000	$2,914,600	$30,242,800

Source: REMPLAN

Providing an increase of 10% in visitor numbers for each of the sectors with no change to the number of nights or estimated expenditure per visitor ($) provides an additional $30.242M in economic benefit to the Shire of Dandaragan (Table 49), creating an additional 146 jobs, $6.895M in wages and salaries, and value-added of $13.897M.

Table 50. Shire of Dandaragan, Scenario 2 – 20% Increase in Visitor Numbers.

Direct Impact	Domestic Day	Domestic Overnight	International	Total
Number of Visitors	22,800	270,000	34,941	327,741
Number of Nights	n/a	1.00	1.00	
Estimated Expenditure per Visitor ($)	$113	$124	$118	
Total Estimated Expenditure ($)	$2,576,400	$33,480,000	$4,123,038	$40,179,438

Source: REMPLAN

An additional 20% in visitor numbers for each of the sectors with no change to the number of nights or estimated expenditure per visitor ($) provides an additional $40.179M in economic benefit to the Shire of Dandaragan (Table 50), creating an additional 194 jobs, $9.160M in wages and salaries, and value-added of $18.463M.

Shire of Gingin

Tourism Output Profile

The tourism output for the Shire of Gingin is $777.25M, which is approximately 39% of the total output for the NGA. Agriculture, Forestry & Fishing ($380.765M), Construction ($86.649M) and Manufacturing ($74.239M) are the Shire's current economic strengths providing approximately 70% of the Shire's output. Ownership of Dwellings ($51.709M) and Tourism ($29.77M) provide key outputs for the Shire, and rank 4th and 5th respectively of the 21 industry categories in overall output for the Shire, with over 10% of total economic output.

Table 51. Shire of Gingin, Economic Output Attributable to Tourism in $M.

Industry Sector	Shire of Gingin	
	$M	%
Agriculture, Forestry & Fishing	$380.765	48.99%
Construction	$86.649	11.15%
Manufacturing	$74.239	9.55%
Ownership of Dwellings	$51.709	6.65%
Tourism	$29.777	3.83%
Public Administration & Safety	$18.792	2.42%
Mining	$15.625	2.01%
Rental, Hiring & Real Estate Services	$14.601	1.88%
Retail Trade	$13.971	1.80%
Wholesale Trade	$13.625	1.75%
Professional, Scientific & Technical Services	$11.604	1.49%
Education & Training	$10.921	1.41%
Administrative & Support Services	$10.867	1.40%
Financial & Insurance Services	$9.020	1.16%
Transport, Postal & Warehousing	$8.541	1.10%
Other Services	$7.936	1.02%
Electricity, Gas, Water & Waste Services	$5.313	0.68%
Health Care & Social Assistance	$4.546	0.58%
Accommodation & Food Services	$3.408	0.44%
Arts & Recreation Services	$3.048	0.39%
Information Media & Telecommunications	$2.295	0.30%
Total	$777.250	100.00%

Source: REMPLAN

Economic Output Attributable to Tourism

The total value of tourism related output for the Shire of Gingin is $29.777M. Accommodation & Food Services ($15.567M), Agriculture, Forestry & Fishing ($4.869M) and Transport, Postal & Warehousing ($3.877M) provide approximately 81.65% of the economic output attributable to tourism in the Shire.

Table 52. Shire of Gingin, Economic Output Attributable to Tourism by Industry Sector in $M.

Industry Sector	Shire of Gingin	
	$M	%
Accommodation & Food Services	$15.567	52.28%
Agriculture, Forestry & Fishing	$4.869	16.35%
Transport, Postal & Warehousing	$3.877	13.02%
Ownership of Dwellings	$1.875	6.30%
Retail Trade	$1.264	4.25%
Manufacturing	$0.902	3.03%
Arts & Recreation Services	$0.457	1.53%
Rental, Hiring & Real Estate Services	$0.404	1.36%
Wholesale Trade	$0.283	0.95%
Education & Training	$0.131	0.44%
Other Services	$0.097	0.33%
Information Media & Telecommunications	$0.028	0.09%
Health Care & Social Assistance	$0.022	0.07%
Construction	$0.000	0.00%
Mining	$0.000	0.00%
Financial & Insurance Services	$0.000	0.00%
Professional, Scientific & Technical Services	$0.000	0.00%
Administrative & Support Services	$0.000	0.00%
Public Administration & Safety	$0.000	0.00%
Electricity, Gas, Water & Waste Services	$0.000	0.00%
Total	$29.777	100.00%

Source: REMPLAN

Employment Profile

The total employment for the Shire of Gingin is 1,994 jobs. Agriculture, Forestry & Fishing (986 jobs), Construction (180 jobs) and Tourism (125 jobs) comprise 64.75% of total jobs in the Shire.

Tourism has ranked 3rd in the industry categories, with Ownership of Dwellings not recording any jobs to June 2018. This could be due to Ownership of Dwellings being considered a secondary employment despite the industry sector contributing $51.709M of economic benefit to the Shire.

Table 53. Shire of Gingin, Tourism Employment Compared to All Industries.

Industry Sector	Shire of Gingin	
	Jobs	%
Agriculture, Forestry & Fishing	986	49.45%
Construction	180	9.03%
Tourism	125	6.27%
Retail Trade	110	5.52%
Manufacturing	97	4.86%
Education & Training	83	4.16%
Public Administration & Safety	81	4.06%
Other Services	52	2.61%
Administrative & Support Services	41	2.06%
Professional, Scientific & Technical Services	39	1.96%
Health Care & Social Assistance	33	1.65%
Wholesale Trade	32	1.60%
Transport, Postal & Warehousing	31	1.55%
Mining	27	1.35%
Rental, Hiring & Real Estate Services	23	1.15%
Accommodation & Food Services	18	0.90%
Arts & Recreation Services	14	0.70%
Financial & Insurance Services	13	0.65%
Electricity, Gas, Water & Waste Services	6	0.30%
Information Media & Telecommunications	3	0.15%
Ownership of Dwellings	0	0.00%
Total	1,994	100.00%

Source: REMPLAN

Employment Attributable to Tourism

Employment attributable to tourism shows the number of jobs in each industry sector in the Shire of Gingin which service demand generated by tourists to the area. Accommodation & Food Services (81 jobs), Transport, Postal & Warehousing (14 jobs), and Agriculture, Forestry & Fishing (13 jobs) provide approximately 86.4% of jobs attributable to tourism in the Alliance. Retail Trade, ranking 4th in the industry sector, provides 10 jobs in the Shire attributable to tourism.

Table 54. Shire of Gingin, Employment Attributable to Tourism by Industry Sector.

Industry Sector	Shire of Gingin	
	Jobs	%
Accommodation & Food Services	81	64.80%
Transport, Postal & Warehousing	14	11.20%
Agriculture, Forestry & Fishing	13	10.40%
Retail Trade	10	8.00%
Arts & Recreation Services	2	1.60%
Manufacturing	1	0.80%
Education & Training	1	0.80%
Wholesale Trade	1	0.80%
Other Services	1	0.80%
Rental, Hiring & Real Estate Services	1	0.80%
Health Care & Social Assistance	0	0.00%
Public Administration & Safety	0	0.00%
Administrative & Support Services	0	0.00%
Information Media & Telecommunications	0	0.00%
Financial & Insurance Services	0	0.00%
Construction	0	0.00%
Electricity, Gas, Water & Waste Services	0	0.00%
Mining	0	0.00%
Professional, Scientific & Technical Services	0	0.00%
Ownership of Dwellings	0	0.00%
Total	125	100.00%

Source: REMPLAN

Wages and Salaries Profile

Agriculture, Forestry & Fishing ($40.724M), Construction ($14.065M) and Public Administration & Safety ($8.964M) have the highest provision of wages and salaries from all industries comprising 52.08% of total wages and salaries for the Shire of Gingin.

Tourism provides wages and salaries of $6.390M, or 5.22%, which equates to approximately $51,120 per person employed in the tourism industry.

Table 55. Shire of Gingin, Tourism Wages and Salaries Compared to All Industries in $M.

Industry Sector	Shire of Gingin	
	$M	%
Agriculture, Forestry & Fishing	$40.724	33.27%
Construction	$14.065	11.49%
Public Administration & Safety	$8.964	7.32%
Manufacturing	$8.938	7.30%
Education & Training	$7.380	6.03%
Tourism	$6.390	5.22%
Retail Trade	$5.597	4.57%
Administrative & Support Services	$4.947	4.04%
Wholesale Trade	$4.205	3.44%
Professional, Scientific & Technical Services	$3.656	2.99%
Health Care & Social Assistance	$2.809	2.30%
Mining	$2.547	2.08%
Financial & Insurance Services	$2.481	2.03%
Other Services	$2.457	2.01%
Rental, Hiring & Real Estate Services	$2.405	1.96%
Transport, Postal & Warehousing	$2.172	1.77%
Accommodation & Food Services	$0.849	0.69%
Electricity, Gas, Water & Waste Services	$0.844	0.69%
Arts & Recreation Services	$0.671	0.55%
Information Media & Telecommunications	$0.294	0.24%
Ownership of Dwellings	$0.000	0.00%
Total	$122.395	100.00%

Source: REMPLAN

Value Add Profile

The total value-added for the Shire of Gingin is $379.601M, with Agriculture, Forestry & Fishing ($199.305M), Ownership of Dwellings ($40.006M) and Construction ($26.657M) providing over 70% of total value-added to industry. Tourism provides a value-add of $13.737M or 3.62% and ranks 5th out of the industry sectors.

Table 56. Shire of Gingin, Tourism Value Added Compared to All Industries in $M.

Industry Sector	Shire of Gingin	
	$M	%
Agriculture, Forestry & Fishing	$199.305	52.50%
Ownership of Dwellings	$40.006	10.54%
Construction	$26.657	7.02%
Manufacturing	$13.963	3.68%
Tourism	$13.737	3.62%
Public Administration & Safety	$10.795	2.84%
Mining	$9.405	2.48%
Retail Trade	$8.535	2.25%
Education & Training	$8.410	2.22%
Rental, Hiring & Real Estate Services	$7.697	2.03%
Wholesale Trade	$6.781	1.79%
Financial & Insurance Services	$5.910	1.56%
Administrative & Support Services	$5.595	1.47%
Professional, Scientific & Technical Services	$5.398	1.42%
Other Services	$3.735	0.98%
Transport, Postal & Warehousing	$3.698	0.97%
Health Care & Social Assistance	$3.312	0.87%
Electricity, Gas, Water & Waste Services	$3.272	0.86%
Accommodation & Food Services	$1.408	0.37%
Arts & Recreation Services	$1.037	0.27%
Information Media & Telecommunications	$0.943	0.25%
Total	$379.601	100.00%

Source: REMPLAN

Tourist Dollar Distribution

For each dollar spent by a tourist in the Shire of Gingin, it is estimated that typically $0.52 is spent on Accommodation & Food Services, $0.16 is spent on Agriculture, Forestry & Fishing, and $0.13 on Transport, Postal & Warehousing.

Table 57. Shire of Gingin, Distribution of Each $1 Spent by a Tourist by Industry Sector.

Industry Sector	Shire of Gingin	
	$	%
Accommodation & Food Services	$0.52	52.28%
Agriculture, Forestry & Fishing	$0.16	16.35%
Transport, Postal & Warehousing	$0.13	13.02%
Ownership of Dwellings	$0.06	6.30%
Retail Trade	$0.04	4.25%
Manufacturing	$0.03	3.03%
Arts & Recreation Services	$0.02	1.53%
Rental, Hiring & Real Estate Services	$0.01	1.36%
Wholesale Trade	$0.01	0.95%
Education & Training	$0.00	0.44%
Other Services	$0.00	0.33%
Information Media & Telecommunications	$0.00	0.09%
Health Care & Social Assistance	$0.00	0.07%
Construction	$0.00	0.00%
Mining	$0.00	0.00%
Financial & Insurance Services	$0.00	0.00%
Professional, Scientific & Technical Services	$0.00	0.00%
Administrative & Support Services	$0.00	0.00%
Public Administration & Safety	$0.00	0.00%
Electricity, Gas, Water & Waste Services	$0.00	0.00%
Total	**$1.00**	**100.00%**

Source: REMPLAN

Visitation Profile

Key Tourism Metrics - 2017

Data collected by TRA for the 2017 calendar year and outlined in Table 58 indicate the Shire of Gingin received 627,000 visitors, with 8,000 (1.3%) from the international market, 176,000 (28%) from the domestic overnight market, and 443,000 (70.7%) from the domestic day market. The average length of stay for the international market was nine nights, with an average spend of $642 per trip and total economic benefit of $5.040M. The average length of stay for the domestic overnight market was two nights, average spend per night of $114 and total economic benefit of $46.6M. The domestic day visitors' average spend per trip was $70 generating a total economic benefit of $31M. The overall economic benefit of tourism to the Shire of Gingin for 2017 was $82.676M, an increase of over $5M from $77.359M in 2016.

Table 58. Shire of Gingin, Key Tourism Metrics for Local Government Area Gingin, 2017.

	International	Domestic Overnight	Domestic Day	Total
Visitors	8,000	176,000	443,000	627,000
Nights	70,000	409,000	-	479,000
Average stay (nights)	9	2	-	3
Average spend per trip ($)	$ 642	$ 266	$ 70	$ 132
Average spend per night ($)	$ 72	$ 114	-	$ 108
Average spend (commercial	$ 80	$ 132	-	$ 124
Economic Benefit	**$5,040,000**	**$46,626,000**	**$31,010,000**	**$82,676,000**

Source: Tourism Research Australia

The top three international markets for 2017 were the United Kingdom with 1,000 visitors generating 9,000 nights, followed by Germany and France (Table 59).

Table 59. Shire of Gingin, Top International Markets, 2017.

Country of Residence	Visitors ('000)	Nights ('000)
United Kingdom	1	9
Germany	np	np
France	np	np

Source: Tourism Research Australia

Key Tourism Metrics - 2008 - 2016

International visitation to the Shire of Gingin recorded varying rates of growth/decline over the period 2008 – 2016. The overall growth between 2008 and 2016 was 42% (2,307) with the highest growth between 2015 and 2016 of 14% (1,003) (Table 60).

Table 60. Shire of Gingin, International Visitor Trend, 2008 – 2016.

International Visitors	Gingin (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	4,792	5,256	4,618	4,960	5,399	5,612	5,484	5,936	6,750
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	5,175	5,685	4,997	5,352	5,827	6,054	5,937	6,449	7,424
Business	np	np	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	5,510	6,028	5,376	5,546	6,041	6,339	6,258	6,814	7,817
Unaccompanied traveller	2,292	2,613	2,620	2,554	2,842	2,899	2,800	2,961	3,228
Adult couple	2,495	2,605	2,019	1,971	2,004	2,280	2,272	2,410	2,877
Family group - parent(s) and children	np	np	np	np	np	np	np	np	np
Friends or relatives travelling together - with or without children	np	np	np	np	np	np	np	np	np
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	-
Total	5,510	6,028	5,376	5,546	6,041	6,339	6,258	6,814	7,817
Hotels and similar accommodation	np	np	np	np	np	np	np	np	np
Friends or relatives property	np	np	np	np	np	np	np	np	np
Caravan park or commercial camping ground	1,862	2,088	1,943	2,004	2,138	2,502	2,225	2,327	2,945
Backpacker or hostel	1,272	1,302	1,257	1,170	1,170	1,100	np	np	np
Guest house or Bed & Breakfast - Other Accommodation	928	1,279	1,031	1,369	1,856	1,827	2,002	2,194	2,451
Own property (e.g. holiday house)	np	np	np	np	np	np	np	np	np
Total	5,510	6,028	5,376	5,546	6,041	6,339	6,258	6,814	7,817

Source: Tourism Research Australia

International visitor nights reflected the visitor trend recording an increase of 52% in visitor nights, and 11% between 2015 and 2016. International unaccompanied travellers doubled between 2008 and 2016 while adult couples decreased by over 60% (23,521 to 14,564). Guests staying in a Guest house or Bed & Breakfast increased from 15,851 in 2008 to 50,329 in 2016, an increase of 300% (Table 61).

Table 61. Shire of Gingin, International Visitor Nights, 2008 – 2016.

International Visitor Nights	Gingin (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	26,631	34,796	33,891	44,584	58,588	53,070	47,266	43,043	45,555
Visiting friends and relatives	np	np	np	np	np	np	np	np	np
Sub-Total Leisure	31,177	41,172	38,239	48,865	64,125	61,289	57,763	53,868	56,088
Business	np	np	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	52,213	60,351	58,561	55,767	66,861	69,979	66,244	72,677	80,594
Unaccompanied traveller	25,814	26,333	26,875	22,523	38,626	46,722	48,284	56,390	51,876
Adult couple	23,521	25,917	17,888	10,393	5,951	5,644	6,045	7,507	14,564
Family group - parent(s) and children	np	np	np	np	np	np	np	np	np
Friends or relatives travelling together - with or without children	np	np	np	np	np	np	np	np	np
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	-
Total	52,213	60,351	58,561	55,767	66,861	69,979	66,244	72,677	80,594
Hotels and similar accommodation	np	np	np	np	np	np	np	np	np
Friends or relatives property	np	np	np	np	np	np	np	np	np
Caravan park or commercial camping ground	4,243	4,440	4,678	4,577	4,218	4,912	3,862	3,973	4,915
Backpacker or hostel	19,163	17,754	16,828	5,261	10,638	9,248	np	np	np
Guest house or Bed & Breakfast - Other Accommodation	15,851	22,447	23,359	35,821	41,819	43,855	38,496	41,506	50,329
Own property (e.g. holiday house)	np	np	np	np	np	np	np	np	np
Total	52,213	60,351	58,561	55,767	66,861	69,979	66,244	72,677	80,594

Source: Tourism Research Australia

The Domestic Overnight Visitors recorded a decrease in visitor numbers between 2008 (108,000) to 2012 (91,000). However this number has consistently increased between 2013 and 2016, from 103,000 to 168,000 (Table 62).

Table 62. Shire of Gingin, Domestic Overnight Visitors, 2008 – 2016.

Domestic Overnight Visitors (000)	Gingin (S)								
	2005-08	2006-09	2007-10	2008-11	2009-12	2010-13	2011-14	2012-15	2013-16
Holiday	78	73	71	69	70	76	90	111	123
Visiting friends and relatives	20	19	21	17	15	19	19	27	30
Sub-Total Leisure	**98**	**92**	**92**	**85**	**85**	**95**	**109**	**138**	**152**
Business	np	np	np	np	np	np	np	np	np
Other reason	np	np	np	np	np	np	np	np	np
Total	**108**	**101**	**98**	**92**	**91**	**103**	**120**	**148**	**168**
Travelling alone	np	np	np	np	np	np	np	np	np
Adult couple	27	23	22	21	21	25	30	35	43
Family group - parents and children	34	33	32	32	29	28	31	44	46
Friends or relatives travelling together - with or without children	29	27	27	23	28	35	39	50	52
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	np
Total	**108**	**101**	**98**	**92**	**91**	**103**	**120**	**148**	**168**
Hotel/resort/motel or motor Inn	np	np	np	np	np	np	np	np	np
Friends or relatives property	39	36	36	33	30	40	36	42	45
Caravan park or commercial camping ground	20	21	22	22	20	20	26	31	33
Backpacker or hostel	np	np	np	np	np	np	np	np	np
Guest house or Bed & Breakfast - Other Accommodation	44	39	35	32	38	37	52	68	102
Not Stated/Not Asked	18	np	np	np	np	np	np	23	27
Total	**108**	**101**	**98**	**92**	**91**	**103**	**120**	**148**	**168**

Source: Tourism Research Australia

The Domestic Overnight nights reflects the trend of national visitors, declining between 2008 (289,000 nights) and 2012 (224,000 nights). This number increased between 2013 (248,000 nights) to 2016 (400,000 nights) (Table 63).

Table 63. Shire of Gingin, Domestic Overnight Nights, 2008 – 2016.

Domestic Overnight Nights (000)	Gingin (S)								
	2005-08	2006-09	2007-10	2008-11	2009-12	2010-13	2011-14	2012-15	2013-16
Holiday	224	194	175	175	170	178	211	262	318
Visiting friends and relatives	41	44	44	36	29	43	44	57	60
Sub-Total Leisure	**264**	**238**	**218**	**211**	**198**	**220**	**256**	**318**	**377**
Business	np	np	np	np	np	np	np	np	np
Other reason	np	np	np	np	np	np	np	np	np
Total	**289**	**257**	**246**	**244**	**224**	**248**	**277**	**333**	**400**
Travelling alone	np	np	np	np	np	np	np	np	np
Adult couple	82	71	66	60	51	55	80	90	111
Family group - parents and children	103	85	85	87	80	77	66	97	109
Friends or relatives travelling together - with or without children	65	63	56	51	62	78	83	106	128
Business associates travelling together with or without spouses -	np	np	np	np	np	np	np	np	np
Total	**289**	**257**	**246**	**244**	**224**	**248**	**277**	**333**	**400**
Hotel/resort/motel or motor Inn	np	np	np	np	np	np	np	np	np
Friends or relatives property	90	82	87	84	72	99	87	99	105
Caravan park or commercial camping ground	60	69	71	72	60	53	62	96	106
Backpacker or hostel	np	np	np	np	np	np	np	np	np
Guest house or Bed & Breakfast - Other Accommodation	133	98	75	77	83	84	113	125	231
Not Stated/Not Asked	65	np	np	np	np	np	np	42	48
Total	**289**	**257**	**246**	**244**	**224**	**248**	**277**	**333**	**400**

Source: Tourism Research Australia

Domestic day travellers remained relatively steady between 2008 and 2013 with only a marginal increase in visitors during this time. Since 2013, visitation has increased from 265,000 to 381,000 in 2016, an increase of 44% (Table 64).

Table 64. Shire of Gingin, Domestic Day Visitor Trend, 2008 - 2016

Domestic Day Visitors (000)	Gingin (S)								
	2005 - 2008	2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016
Holiday	180	190	196	201	210	195	208	226	239
Visiting friends and relatives	53	52	59	np	np	np	np	79	100
Sub-Total Leisure	233	242	255	249	258	246	278	305	340
Business	np	np	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np	np	np
Total	262	276	285	273	278	265	300	331	381

Source: Tourism Research Australia

Tourism Growth Scenarios

With tourism ranked 7th in the industry sector there is still opportunity for the numbers of tourists to increase across all sectors – international, domestic overnight and domestic day visitors.

Two scenarios are provided below, Scenario 1 providing a 10% increase in visitor numbers and Scenario 2 providing a 20% increase in visitor numbers for each of the sectors (Domestic Day, Domestic Overnight, International).

Table 65. Shire of Gingin, Scenario 1 – 10% Increase in Visitor Numbers.

Direct Impact	Domestic Day	Domestic Overnight	International	Total
Number of Visitors	38,100	218,400	7,817	264,317
Number of Nights	n/a	1.00	1.00	
Estimated Expenditure per Visitor ($)	$67	$115	$72	
Total Estimated Expenditure ($)	$2,552,700	$25,116,000	$562,824	$28,231,524

Source: REMPLAN

Providing an increase of 10% in visitor numbers for each of the sectors with no change to the number of nights or estimated expenditure per visitor ($) provides an additional $28.232M in economic benefit to the Shire of Gingin (Table 65), creating an additional 118 jobs, $6.059M in wages and salaries, and value-added of $13.024M.

Table 66. Shire of Gingin, Scenario 2 – 20% Increase in Visitor Numbers.

Direct Impact	Domestic Day	Domestic Overnight	International	Total
Number of Visitors	76,200	268,800	7,817	352,817
Number of Nights	n/a	1.00	1.00	
Estimated Expenditure per Visitor ($)	$67	$115	$72	
Total Estimated Expenditure ($)	$5,105,400	$30,912,000	$562,824	$36,580,224

Source: REMPLAN

An additional 20% in visitor numbers for each of the sectors with no change to the number of nights or estimated expenditure per visitor ($) provides an additional $36.580M in economic benefit to the Shire of Gingin (Table 66), creating an additional 153 jobs, $7.850M in wages and salaries, and value-added of $16.875M.

Section 6

Assessment of Current Tourism Offering in the Shire of Chittering

Section 6 – Assessment of Current Tourism Offering in the Shire of Chittering

Workshops were held in the Shire of Chittering on Monday, 23rd of April 2018, at the Nationals Office, Bindoon. Two workshops were conducted: 12noon – 3pm (9 participants) and 5.30pm – 8.30pm (12 participants).

A number of activities were completed during the tourism workshops:

- Conduct a SWOT analysis of tourism in the Shire of Chittering,

- Conduct a SWOT analysis of tourism in the Northern Growth Alliance,

- Identify the key assets and services in the Shire of Chittering,

- Identify what is working/what is not working in the Shire of Chittering,

- Identify the key tourist activities, attractions and events in the Shire of Chittering,

- Identify the tourism gap areas in the Shire of Chittering,

- Identify potential projects which will increase tourism to the Shire resulting in an increase in economic benefit.

The outcomes of the activities are detailed as follows.

SWOT Analysis – Tourism in the Shire of Chittering

Table 67. Shire of Chittering Workshops, SWOT Analysis - Tourism in the Shire of Chittering.

Strengths	Weaknesses
• Closeness to market • Chittering wineries • Events (Volunteers/ Community) • Proximity to Perth • Strong Community spirit (safe, relaxed, country, friendly) • Animals • Aging population • Pretty • Bakery/ Restaurant • Flora • Julimar lake • Creative people • Lots of produce grown in the region • Growing population • Boutique farms • Tourist drive-Chittering Valley • Wine region • Award winning businesses • Active Chamber of Commerce • Winter/ Spring weather (warm temperature, beautiful green) • Natural landscapes/ environment (clean air, threatened species and ecological communities) • Highway upgrade	• Disorganised- lack of collaboration • Lack of diversity • Lack of funding- locally and regionally • Decentralised • Few cellar doors/ farm gates open • Too small • No educational opportunities after Year 6 • Transient population • Lack of attractions and activities- natural and built • Unknown area • Lack of a range of accommodation choices • Lack of online presence • Not enough "good" cafes or restaurants • Lack of employment • Local residents do not understand "value of tourism" • Variation of accommodation • Lack of resources- human and infrastructure • Local government governance • Lack of young adult activities/ kid attractions • Lack of brand/ profile • Proximity to Perth for overnighters • Tourism operators not working together • Lack of regional collaboration • Lack of cultural knowledge of the area • Digital capability- engaging volunteers (people's ability to use the medium correctly) • Who do we want to attract • Lack of data collection- where are visitors from • Learn from other communities

Opportunities

- Closeness to market
- Diverse food production
- Diverse tourist products
- Northlink
- Employment node- Muchea
- Bike paths
- Farm stalls
- New roads
- Possible state funding (Swan Valley)
- Online promotion
- Proximity to Perth
- Teatree Resort
- Upgraded highway- quicker to get here
- Middleman for produce
- Natural resources- hills, lakes, bush, wildflowers
- Stopover
- Campsite/ adventure grounds
- Food and wine trails
- Stay unique
- Breweries
- More boutique farms/ accommodation
- Playgrounds
- Chittering Wildlife Centre- volunteers, education
- Bindoon- hills opposite (east) of town- bike trails/ zip lines
- Cycle paths
- Julimar- state forest/ rivers and tributaries/ lakes
- Campsite/caravan
- Eco tourism sustainable- spotlighting, Western Shield
- Cultural history (Margaret Drayton, Yued elder)- anthropological report/ online trails
- Producers- strategy to build capacity
- Communication strategy
- Centralised food hub in Bindoon

Threats

- Heat/ fire
- Swan Valley/ Toodyay and surrounding shires better promoted
- Lack of water
- Competitive industry
- Apathetic tourism operators- tired
- Recession- investment/ day trip costs
- BP removing money from area
- Bypass
- Light pollution
- State planning policy
- Economics
- Reduction of funding
- Highway upgrade deviation around towns
- Division of direction
- Perth hills/ other growth areas competing
- Strong brands south of Chittering
- Climate change
- Other economic activity

SWOT Analysis – Tourism in the Northern Growth Alliance

Table 68. Shire of Chittering Workshops, SWOT Analysis – Tourism in the Northern Growth

Alliance.

Strengths	Weaknesses
- Pinnacles- well marketed (coastal attractions) Lancelin - Similar assets in the Hinterlands - Diversification - Local produce (seafood/ citrus/ food bowl) - Collaboration between shires gives more strength behind proposals/ grants - More visitor numbers as they are combined across three Shires - Diversity- agriculture/ natural assets - Seasonal tourism options - More opportunities - Coast - More accommodation - More attractions - More facilities - Shared valuable marketing dollars	- Big area across three shires - Two different products/ areas (coastal, bush, farm) - Interpretive and directional signage is terrible - Difficult to brand - Clear route for travel - Branding unclear - Funding is for marketing not development - Joint marketing- big and little - No regional brand - Might be that each community will not share - Lack of cohesion - Road structures - No awareness
Opportunities	**Threats**
- Combine similar products/ services across the region - Tour operators (start-up) - Opportunities to pool resources and grant seeking abilities - Cross promotion across shires - International tourism (food, agriculture, wildlife) - Interpretive and directional signage to be improved - Regional growth - Collaboration - Song lines for traditional owners - Bush food/ medicines - Progressive Shire CEO's - Regional brand - Bus tours/ stop overs - Broadens the opportunities for operators	- Competing with big tourism operators - Division of direction - Vulnerable to changing attitudes in Shire eg, human resources/ projects - Sharks - Silos - Shire - Beaurocracy - Less tourism product than Dandaragan and Gingin - Clash of events - Unwillingness for tourism industry to work together

Key Assets and Services

Table 69. Shire of Chittering Workshops, Key Assets and Services.

Assets	Services
Bakery/Restaurant	Rangers
Lots of produce grown in the region	Road maintenance
Boutique farms	Suite of events
Tourist drive-Chittering Valley	Visitor centres
Wine region	Waste services
Award winning businesses	Grounds keeping
Active Chamber of Commerce	Planning
Natural landscapes/ environment (clean air, threatened species and ecological communities)	Building & Health
Blackboy Ridge	CRC
Julimar Forest	Tourist info bay
Monastery	Hospitality
Enderslea Farm	Accommodation
Brockman Centre	Fire service
Eden Grove – orange orchard	Current review of the Aged Care and Disability services
Edmond Rice College	Chittering Community Bus Service
Heritage Museum	WA Country Health Services
Lake Chittering	Chittering Health Centre - Jupiter Health & Medical Centre
Lake Needoonga	KidSport Funding

What's Working/What's Not Working

Table 70. Shire of Chittering Workshops, What's Working/What's Not Working.

Working	Not Working
Bakery	Disjointed
Hardware	Caravan park
IGA	Nothing obvious to do
Town Hall	Lack of continuity
Beautiful vista	Events eg, Spring Festival
Restful	Bakery
A way to get away	Blackboy Ridge
Wildflowers	Golden Grove
Wineries trails	Brockman Centre
Trails	Centre of town
Interpretation	Clune Park
Instagram	Wine Trail
Brockman Centre	Lake Chittering no access
Farmers Market 50/50	The internet
Bakehams	Signage
Motor bike trail	Promotion/ marketing of area
Stringy Bark	Not attracting enough visitors
Open mic night	Tourism model
Bindoon Agriculture Show	Orienteering
Taste Festival	
Events	
Developing of Volunteers	
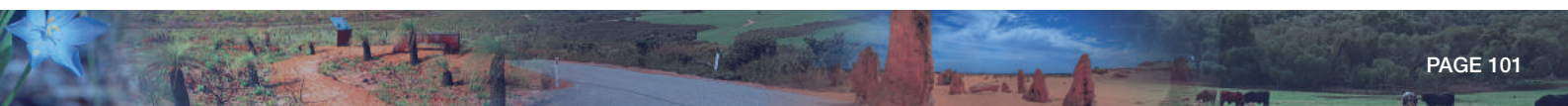
Current Tourism Offering

Table 71. **Shire of Chittering Workshops, List of Key Tourist Activities, Attractions and Events in the Shire of Chittering.**

Attractions, Events & Activity	Tourism Category
Blackboy Ridge	Nature based/ Adventure/ Ecotourism/ Geotourism/ Conservation
Julimar Forest	Nature based/ Geotourism/ Ecotourism/ Conservation
Blueberry Farm	Nature based
Chittering Acres	Nature based
Bakery/Restaurant	Culinary/Business
Junior Rodeo	Event
Mango Festival	Event/Culinary
Wear Ya Wellies	Event
Monastery	Accommodation/ Heritage/Religious/Cultural
Retreat Lower Chittering	Accommodation/Business/ Health & Wellness
Astronomy	Voluntourism/Astro-tourism/Nature based/Education
Taste of Chittering	Event/Culinary/Agriculture
Bindoon Show/Rodeo	Event/Culinary/Sport/Agriculture
Spring Festival/ Historical Cars	Event /Culinary/Festival/Business/Agriculture/Heritage
Enderslea Farm	Culinary/ Business/Agriculture/Heritage/Cultural
Farm Stays	Accommodation/Business/Agriculture
Wineries	Culinary/Business/Agriculture
Churches	Heritage/Conservation/Religion
Markets (Sunday)	Event/Culinary/Festival/Business/Agriculture
Sculptures	Events/Festival/Cultural
Food bank- orange picking	Nature based/Agriculture/Business
Brockman Centre	Heritage/Cultural/Business/Education
Eden Grove – orange orchard	Agriculture/Business
Chittering Estate	Business/Cultural
Edmond Rice College	Religion/Education
Walk trails	Nature based/ Ecotourism/Geotourism
Birdwatching	Nature based/ Ecotourism
Photography	Nature based/Cultural
Op Shop	Heritage/Business /Cultural
Heritage Museum	Heritage/Business /Cultural
Lake Chittering	Nature based
Lake Needoonga	Nature based
Wildflowers	Nature based
Chittering Valley	Nature based
Polocross	Events/Sport

Identified Tourism Gap Areas

Gap areas in the tourism offering were then identified (Table 72) based on the number of tourism product available per category:

Table 72. Shire of Chittering Workshops, Numbers of Product Offering per Tourism Category.

Tourism Category	Number of Activities, Attractions, Events
Adventure	1
Agri-tourism	9
Astro-tourism	1
Business	13
Conservation	3
Culinary	8
Cultural	8
Ecotourism	6
Education	3
Event	9
Festival	3
Geotourism	4
Health and Wellness	1
Heritage	7
Nature Based	15
Religious	3
Sport	2
Voluntourism	1

Gap areas were identified on the lowest total number of activities, attractions and events in each of the tourism categories. The key gap areas with a potential to increase visitation to the Shire of Chittering were identified as:

- Adventure,

- Astro-tourism,

- Festivals,

- Health and Wellness,

- Indigenous, which had not been identified as a current tourism product offering.

A number of gap areas were identified in the course of stakeholder interviews and workshop discussions which have been included in the short, medium and long term actions and projects for the Shire of Chittering in Section 9.
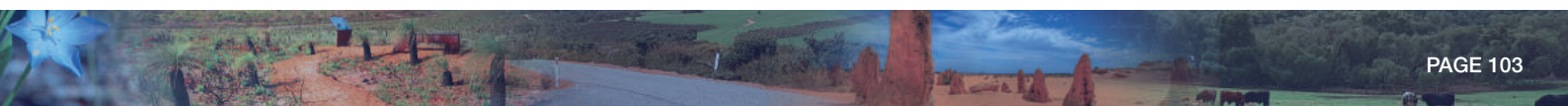
Section 7

Assessment of Current Tourism Offering in
the Shire of Dandaragan

Section 7 – Assessment of Current Tourism Offering in the Shire of Dandaragan

Workshops were held in the Shire of Dandaragan on Wednesday, 9th of May 2018 at the Conference and Education Centre in Jurien Bay from 5.30pm – 8.30pm (5 participants), and Tuesday, 22nd of May 2018 at the Community Resource Centre in Dandaragan from 5.30pm – 8.30pm (20 participants).

A number of activities were completed during the tourism workshops:

- Conduct a SWOT analysis of tourism in the Shire of Dandaragan,

- Conduct a SWOT analysis of tourism in the Northern Growth Alliance,

- Identify the key assets and services in the Shire of Dandaragan,

- Identify what's working/what's not working in the Shire of Dandaragan,

- Identify the key tourist activities, attractions and events in the Shire of Dandaragan,

- Identify the tourism gap areas in the Shire of Dandaragan,

- Identify potential projects which will increase tourism to the Shire resulting in an increase in economic benefit.

The outcomes of the activities are detailed below.

SWOT Analysis – Tourism in the Shire of Dandaragan

Table 73. Shire of Dandaragan Workshops, SWOT Analysis - Tourism in the Shire of Dandaragan.

Strengths	Weaknesses
- Wildflowers - History- heritage - Location- close to capital city - Cray fishing and Lobster Shack - Friendly communities - Sea lion tours - Coastal - Accommodation diversity - Inland - Nature walks - Space - Agriculture and horticulture - Climate - Jurien Skydive - Fishing - Sand dunes - Beach - Jurien bay tourism products - Diving trail - Building and history- military - Sunset tours - Clean towns and beaches - Pinnacles - Protection of natural - Cycle ways - Mt Lesueur - Night sky - Jurien marine park - Caves - Town population is enthusiastic - Eco tourism - Beautiful scenery - Sense of community - Developing industries - Techno tourism - Non- congestion for visitors - Location - Diversity drives innovation - Sea - Strong volunteer support - History of area - Strong tourism provider businesses exists - Coastal run- Lancelin- Wedge- Grey-Cervantes-Jurien - Tourist love open areas	- Lack of funding - Accommodation inland - Eating places - No 72 hrs camping/ stop places- inland - Lack of toilets at campsites - Lack of camping facilities - Lack of people, more people, more opportunities to get things done - Coastal communities are restricted - Parks and wildlife restrictions are big - No identity - No unity between towns - Shops closing early - Secondary education weakness- families moving away - Lack of toilets - Food after 8pm- no roadhouse - Advertising- marketing/ sharing promotion - Lack of education- sharks, how to use the road, history - Lack of keeping up of roads - Mobile phone coverage/ internet - Lack of branding - Competition - Co-ordination - Lack of tourism - Tourism accommodation (bush) - Marketing - Underutilisation of coastline - R.F to Badgy road completion? - Lack of access to coast from Indian Ocean Drive - Lack of walk trails/ fishing in Dandaragan- tourism infrastructure - Not being able to camp on the coast and inland - Small population leads to lack of tourist facilities - Need stickers - Existing housing empty but not available for rent - Tourism association/ network/ bond - Need a particular "catchphrase" for people to relate to - More free camping opportunities - Not catering in tourism demographics needs and wants - Lack of local visitor data and impact on economy - Hidden treasures- not making the most of opportunities
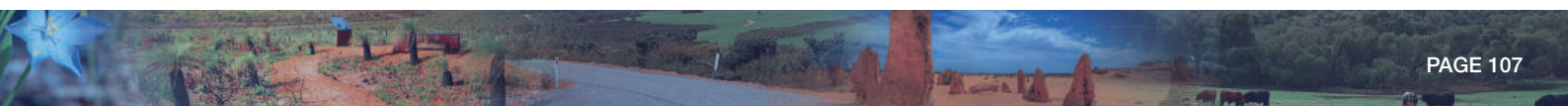
Opportunities

- Shire 4 Arts Trail - connecting towns
- C.D's the Wheatbelt way
- More social media needed
- Experiential tourism
- Merchandising
- Events throughout the year
- Accommodation diversity and network together
- Tourism packaging
- Promotion/ sharing between areas/ advertising
- Fish off the jetty
- Sporting tourism (bowls, golf) charity, caravan clubs
- More walk trails and booklets
- Shark nets
- Local trip adviser app
- Better signage/ international alliance/ rules
- Wifi
- Indigenous culture
- Military involvement - buildings and history
- Selling Telstra sim cards
- Drive trail across Shire
- Emerging agriculture sector
- Mining x3 (Iluka, Tronox image)
- Windfarm - renewable energy x3
- Cervantes coastline
- Wedge Island
- Cultural- European- shacks
- Sympathetic development
- Community funded resources
- Develop "day tours" from Perth
- Farm Stays
- Pool in town
- Wildflowers
- Develop caravan club stays
- Farm tours
- Develop caravan park sites
- Distinctive merchandise
- Land based activities
- Agriculture tourism
- History - Shephard ruins
- Community scientist/ citizen science
- Promote Dandaragan Way
- Rustic camping and accommodation opportunities
- Horticulture
- Seasonal tourism
- Night sky- astrotourism
- Develop "wildflowers" areas adjacent to Dandaragan
- Social media
- More linking people to travel to each town
- Geotourism
- Spring
- Breakaways
- Develop stargazing nights at Aggies and Yallalie Crater
- Yallabee impact
- Caves
- Beach
- Develop a cooperative relationship with local indigenous population

Threats

- Lack of people
- Reducing population
- Mine reducing
- Farms are bigger, lack of family farms
- Funding
- Some places are 4 wheel drive only
- Sharks- publicity in WA
- Economic down turn
- Road toll- publicity in WA
- Pinnacles incident (example, just like lano bus roll over)
- Clearing road verges of native vegetation
- Grey nomads- don't spend any money
- Competition- Kalbarri
- Fracking
- Dandaragan static population
- Aging assets
- Underutilisation of coastline
- Regulations
- Big tourism companies
- Day trips
- Self-cater
- Fully self-contained campers
- Visitor rubbish and environmental damage (eg, Sandy Cape taking in caravans)
- Visitor impact on environment
- Ownership of data we collect

SWOT Analysis – Tourism in the Northern Growth Alliance

Table 74. Shire of Dandaragan, SWOT Analysis – Tourism in the Northern Growth Alliance.

Strengths	Weaknesses
- Linked together/ co-ordination - Sharing resources - Additional features/ products - Efficiency - Sub regional strategy - Close to Perth - Diversity of attractions- wide scope - Networking ability - Gingin/ Bindoon events to link with - Strength in numbers - Learn from each other - Nature attractions - CU & SB events - Wineries - Quiet stays - Gravity - Local produce - Barbecues - Windsurfing capita at Wedge and Cervantes - Old car collection - Art Centre at Cervantes - Darwin Link - new road - Great access roads to inland attractions - Wildflowers - Aggies Cottage & maybe local produced in huge quantities - Yallalie Crater - Skydiving and attractions & national parks - Picturesque - Pinnacles- maybe areas 4 wheel driving - Speedway - Overnight stays in a rural environment - Complementing activities spanning the Shire - Merging/ blending of agriculture and horticulture - Mountain bike trails - Walk trails - Have CRC network across NGA - Diverse products to buy - Amazing food - Olive oil - Camel Café - Art and craft - Sculptors - Coastal area in its original state between Lancelin & Cervantes- desert dunes	- Co-operation between Shires - Local people don't support local events – lack of volunteers - Clash of event dates- working together - Knowledge of events - Think about what/ who we are focusing/ targeting - Community groups burnt out - Education - Group advertising - Promotion - Linkages/ rivalry - Harness strengths - No link between attractions - Bypass - Side roads poor- need grading - Telecommunications not reliable - No roadside toilets - Lack of marketing - Lack of government funding - Lack of affordable accommodation - Reliance on volunteers - Education - Harnessing strength in diverse produce in region - Lack of tourism skilled labour - Not capturing the opportunities in tourism - Use of social media- not fully used - Bypass - Long distance between/ lack of attractions - Lack of advertising of businesses - Road conditions - Signage

Opportunities

- Symbiotic relationship
- Create a 3-5 day tour trip
- Bus tours/ eco
- Emerge in the experience
- Cultural tourism- agricultural tourism
- Where milk comes from
- Stargazing
- Build an app
- Round trip map
- Social media
- Someone to manage $$
- Events calendar
- Make regional map into app - Shires/ business to contribute
- Map reprint and update
- Cost for maps- tourists
- Branding/ Ads
- Triathlon
- Events - Schools involved
- Involve locals/ volunteers
- Invite young people
- Website that is updated regularly
- Brochure drops to tourism business
- Cash in on celebrity
- Loyalty cards
- CRC network
- Bike group
- Develop touring routes for different demographics
- Cycling events
- Adventure tourism
- Promote Andrea's regional wildflower guide
- Family tourism
- Linked with marketing opportunities
- Playground crawl
- Graduating trips out of Perth
- Short or small/ taster
- Getting longer/ graduating further up
- Food trails- bringing all together
- Beef, olive, mangos, wineries, bakery
- Locals card
- People- all promoting tourism strengths/ grass roots
- Drive trails/ walk trails
- Work together
- Food outlets/ fresh produce
- Restaurants
- Public toilets
- Accommodation
- Networking businesses
- Farmers markets
- Heritage trails
- One stop shop (circuit information, same story each entry point)

Threats

- Who gets priority - funding within three shires
- State of priorities outside of our region
- Marketing
- Funding
- People (time/leaving/age/burnt out)
- Cost of everything
- Large overseas investment not contributing in local
- Sustainability
- Government
- Population
- Cost of fuel
- Rivalry
- Cohesion- lack of
- Dedication of time, resources, expertise
- Lack of people
- Sustainability of business
- Lack of funding
- Overseas developments/farms not spending money in towns

Key Assets and Services

Table 75. Shire of Dandaragan Workshops, Key Assets and Services.

Assets	Services
Wildflowers	Rangers
Location- close to capital city	Road maintenance
Friendly communities	Suite of events
Agriculture	Environmental Health Services
Horticulture	Waste services
Space	Grounds keeping
Diving trail	Planning
Sea lion tours	Building & Health
Sunset tours	Accommodation
Pinnacles	Tourist info bay
Cray fishing and Lobster Shack	Hospitality
Jurien Skydive	Dandaragan Community Resource Centre
Cycle ways	Fire service
Sand dunes	Visitor centres
Caves	Turquoise Coast Visitor Centre
Mt Lesueur	
Accommodation diversity	
Jurien Marine Park	
Building and history	
Coastal run: Lancelin- Wedge-Grey-Cervantes- Jurien Bay	
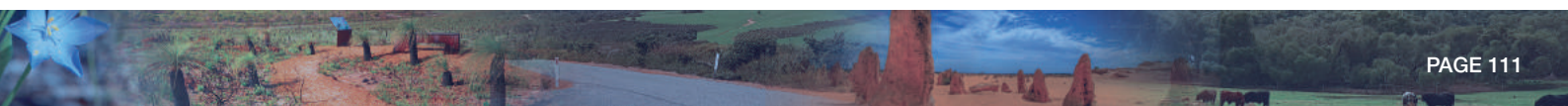
What's Working/What's Not Working

Table 76. Shire of Dandaragan Workshops, What's Working/What's Not Working.

Working	Not Working
Location- close to capital city	Lack of funding
Friendly communities	Accommodation
Coastal	No 72 hrs camping/ stop places- inland
Inland	Lack of toilets at campsites
Diving trail	Lack of camping facilities
Sea lion tours	Shops closing early
Sunset tours	Food after 8pm- no roadhouse
Pinnacles	Advertising- marketing/sharing promotion
Cray fishing and Lobster Shack	Lack of keeping up of roads
Jurien Skydive	Mobile phone coverage/internet
Sand dunes	Lack of tourism
Caves	Under-utilisation of coastline
Mt Lesueur	Lack of access to coast from Indian Ocean Drive
Accommodation diversity	Existing housing empty but not available for rent
Jurien Marine Park	Some places are 4 wheel drive only
Sense of community	Lack of volunteer support in younger demographic
Clean towns and beaches	
Location	
Agriculture and horticulture	
Building and history- military	
Coastal run: Lancelin- Wedge- Grey-Cervantes- Jurien	
Jurien Bay tourism products	
Beautiful scenery	
Developing industries	
Town population is enthusiastic	
Strong volunteer support in older demographic of members	
Non- congestion for visitors	

Current Tourism Offering

Table 77. Shire of Dandaragan Workshops, Key Tourist Activities, Attractions and Events in the Shire
of Dandaragan.

Attractions, Events & Activity	Tourism Category
Sky diving	Sport/Adventure
Surfing	Sport/Adventure
Windsurfing	Sport/Adventure
Bush walks	Ecotourism
Dune Buggies	Sport/Adventure
Pinnacles	Geotourism
Fishing	Marine
Beach exploration	Discovery
Caves	Geotourism
4WD'ing	Adventure
Kayaking	Adventure
Football	Sport
Golf	Sport
Bowls	Sport
Stargazing	Astrotourism
Observatory	Astrotourism
Wineries	Culinary
Restaurants	Culinary
Food bowl producers	Farm
Historical sites	Heritage
Scenic drives	Nature based
Wildflowers	Nature based
Events around Dandaragan	Festivals
Nambung Station Country Festival	Festivals
Caravan clubs	Eco tourism
Pilates	Medical/Wellness
Yoga	Medical/Wellness
Tai Chi	Medical/Wellness
Vet	Medical/Wellness
Mt Lesueur	Nature based
National park	Nature based
Flora/fauna	Nature based
Walk trail	Nature based
Yallalie Crater	Astrotourism
Vern Westbrook	Nature based
Yathroo - roadside	Experience/Business
Aggies	Experience
Yadin	
Mine- wind/solar farm	Experience/Business
Coomallo Park	Accommodation

Sandy Cape	Nature based
Regan's Ford	Nature based
Produce/farms	Agritourism
Dandaragan Way	Trail
Turquoise Way	Trail
Opera at Pinnacles	Event
Ior (Badgy shears, working dogs)	
Drives	Trails
Snorkelling	Trails
Ian Wilson Walk	Nature based
Badgingarra National Park	Nature based
Stockman's Cave	Nature based
Wedge Island Beach	Nature based
Wedge Shack communities	Experience
Native playground in Badgingarra	Experience
Stromatolites	Nature based
Sea Lion Tours	Nature based
Night sky	Nature based/Astrotourism
Lobster Shack	Culinary
Mogumber Mission	Experience
Agriculture	Experience/Business
Horticulture	Experience/Business
Moore River	Nature based
Guilderton	Experience/Business
Sunset tours	Nature based
Surf comps	Events
Hi Valley Farm - wildflowers	Nature based
Cervantes Art Festival	Events
Blessing of the Fleet	Events
Repertory	Events
Windsurf Championships Cervantes	Events
Parachuting	Adventure
Boating	Sport/Adventure
Motorbikes	Sport/ Adventure
Playground	Adventure
Lake Thetis	Geotourism/Ecotourism
Marine Park	Ecotourism
Maritime history	Cultural/Heritage
Farming history	Heritage
Military history	Heritage
Indigenous history	Indigenous
Historical buildings	Heritage
Lookouts	Ecotourism
Agriculture	Agriculture
Photography	Nature based
Australia day cricket match W/I	Festival

Identified Tourism Gap Areas

Gap areas in the tourism offering were then identified (Table 78) based on the number of tourism product available per category:

Table 78. Shire of Dandaragan Workshops, Numbers of Product Offering per Tourism Category

Tourism Category	Number of Activities, Attractions, Events
Adventure	9
Agri-tourism	2
Astro-tourism	4
Business	5
Conservation	0
Culinary	3
Cultural	1
Discovery	1
Ecotourism	5
Education	0
Event	6
Experience	6
Farm	1
Festival	3
Geotourism	3
Health and Wellness	4
Heritage	5
Indigenous	1
Nature Based	20
Marine	1
Religious	0
Sport	8
Trail	4
Voluntourism	0
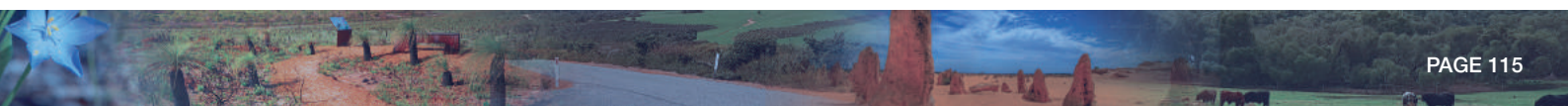
Gap areas were identified on the lowest total number of activities, attractions and events in each of the tourism categories. The key gap areas with a potential to increase visitation to the Shire of Dandaragan were identified as:

- Agritourism,

- Culinary,

- Educational,

- Festivals and events,

- Indigenous,

- Military heritage,

- Technology,

- Wellness and Medicine.

A number of gap areas were identified in the course of stakeholder interviews and workshop discussions which have been included in the short, medium and long term actions and projects for the Shire of Dandaragan in Section 9.
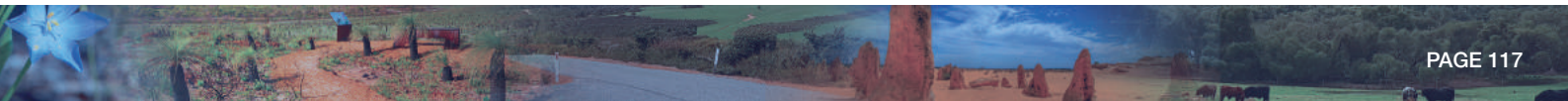
Section 8

Assessment of Current Tourism Offering in the Shire of Gingin

Section 8 – Assessment of Current Tourism Offering in the Shire of Gingin

Workshops were held in the Shire of Gingin on Monday, 9th of April 2018 at Council Chambers, Gingin from 5.30pm – 8.30pm (11 participants), and Wednesday, 11th of April 2018 at the Wangaree Community Centre, Lancelin, from 5.30pm – 8.30pm (12 participants).

A number of activities were completed during the tourism workshops:

- Conduct a SWOT analysis of tourism in the Shire of Gingin,

- Conduct a SWOT analysis of tourism in the Northern Growth Alliance,

- Identify the key assets and services in the Shire of Gingin,

- Identify what's working/what's not working in the Shire of Gingin,

- Identify the key tourist activities, attractions and events in the Shire of Gingin,

- Identify the tourism gap areas in the Shire of Gingin,

- Identify potential projects which will increase tourism to the Shire resulting in an increase in economic benefit.

The outcomes of the activities are detailed as follows.

SWOT Analysis – Tourism in the Shire of Gingin.

Table 79. Shire of Gingin Workshops, SWOT Analysis – Tourism in the Shire of Gingin.

Strengths	Weaknesses
• Moore River/ Gingin Brook • Ocean • Boardwalks • Hinterland • Gravity Discovery Centre • Clear nights/ sky • Wind (Kite surf/ windsurfing)- Lancelin Classic • Beach fishing • Off road vehicle area • Cray fish • Fruit and vegetables • British Car Day • Helicopter tours • Scenery • Honey production • Regional sport • Heat (on coast in summer) • Can cater for all seasons • Diversity- Coast and Country • Friendly people • Flora • Open space • Motivation of community • Sand dunes/ Beach/ Ocean • Energetic community • Tourist town • Hard working community • Restaurants • Want tourism to happen • Sunsets • N.B.N • Family holiday • Strong, united, focussed community • Medical Centre • Community associated • Sand boarding • Water activities • Simple life • Social media • Fishing charters • Gateway to Coral Coast and Northern access • Food production • Heritage buildings/ water wheel • Natural environment • Close enough to Perth but just far enough away (day trippers)	• Not many food farm gate providers • Seasonal visitors • Can't see farm activities • Transport • Limited/ lack of accommodation • Lack of promotion • Planning policies may be too restrictive (could need slight alterations) • Fire Act restricts camping • Quiet in winter/ busy in summer (out of balance) • Experience Perth branding • Lack of co-ordination between coast and inland communities • Lack of tourist access • Difficulty in attracting longer stay visitors • Café/ Coffee shops • Anti-progress element of community • Mobile/ Internet reception • Shortage of events to attract visitors • TV reception • Lack of signage/ directional signage • Fishing charter Ledge Point • Lack of effective communication • Intermittent power supply • Some sections of community not interested • Lack of accommodation • Too close - encourages only day trippers/ proximity to Perth • Red tape (DBCA) • Lack of young developers workforce • Lack of funding • Bureaucratic red tape hinders efforts • Sand flies • Planning bylaws incongruent with tourism • Negative social media • Branded with Coral Coast from Guilderton to North • Tourism information • Standard of accommodation in Lancelin • Bypassing Lancelin (Indian Ocean Drive) • Can't develop north or east only south • Wages/ employment for businesses/ workforce

Opportunities

- Farm gate producers
- Farm stays/ Air B&Bs
- Farm tours (see how it grows)
- Restaurants
- Eco-accommodation
- Farmers markets
- Planning policy review/ town planning
- Walk trails
- Perth shopping tours for groceries
- Sports/ biking activities
- Market hall in town (changing venues)
- Astrograph trail
- Mogumber Mission
- Common branding through signage
- Educating visitors of attractions
- Link coastal towns with scenic drive
- Attracting investment in tourism developments
- CP development
- Link events together across region
- Business tours @ cray facilities
- Enhance and beautify coastline and recreational amenities
- Meals on dunes
- Electric car charge
- Utilise maritime history
- Pathway along coast
- Diving wrecks (promote more)
- Themed trails and walks/ motor
- Marketing regional products
- Back Beach mobile van (coffee and snacks)
- Social media
- Day trippers/ buses (extended stays)
- Sell fresh fish/crayfish
- Eateries to cater for day trippers
- Improve communication (WIFI)
- Networking with other business
- Open Old Ledge Point Road
- Kite, wind and surf lessons
- Marina in Ledge Point
- New shops
- Coral Coast branding
- Marketing changes need to improve
- Dive tours
- Enable LPCC to sell takeaway
- Lancelin Ocean Classic
- Develop Lancelin Plaza (appearance needs a lot of work)
- More festivals (seasons)
- Opportunity to be put in with Coral Coast instead of Experience Perth
- Increase accommodation in smaller communities to allow growth
- Encourage local communities to have increased input in decision making
- Expansion of business for encouraging people to stay, Free camping

Threats

- Government change
- Mosquitoes
- Change in $ value/exchange rate
- Not able to use dunes
- Water loss/groundwater drying up - agriculture decline
- Unstable beach dunes
- Insurances/ litigation
- Erosion threat to natural environment
- Southwest region lack of government funding- Royalties For Regions
- Losing Lancelin Classic
- Bypassing northern regions
- Financial constraints
- Lack of vision of decision makers
- Mining of sand
- Lack of creativity of decision makers
- Unauthorised beach access
- Risk averse culture impedes development
- Defence Base
- Lack of support for local business ventures
- Migration of sand
- Proposed CHRMAP anti-tourism and anti-development
- Decline of fishing (Regulatory)
- Hi water levels (inundation)
- Free camping
- Regulatory framework for hospitality industry to grow
- No takeaway food/bar available in Ledge Point
- Communication
- Bombing range threat to wildlife
- Lack of management of local environment
- Rental of businesses
- High rents
- Increased recreational restrictions on fishing licences
- Seasonal town- relying on weather
- Diminishing grant funding for promotion
- Volunteers always same people- burn out/ liability
- Negative people
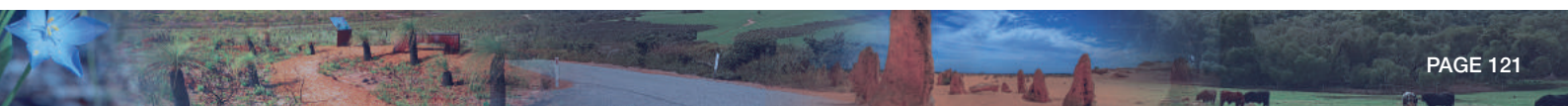
SWOT Analysis – Tourism in the Northern Growth Alliance.

Table 80. Shire of Gingin Workshops, SWOT Analysis – Tourism in the Northern Growth Alliance.

Strengths	Weaknesses
• Wildflowers • Sea life • Self-drivers • Foot print • Different activities in different Shires • Wine trails • Working together • Greater diversity • Food and wine trails- seafood, fruits etc. • Variety of natural attractions eg. wildflowers, Pinnacles, caves, beaches, stargazing • Fishing and camping • Sharing knowledge/ information • Strength in collaboration • Attract more tourists • Exposure increase • National Parks • Close to Perth • Marketed in Coral Coast (strong) Dandaragan • Diversity of all our natural assets • Windsurfing (Lancelin Ocean Classic)	• Limited accommodation • Health services opening hours • Can't accommodate groups/ conferences • Lack of shop hours • Irregular opening hours • Lack of communication • Inconsistent service and service provisions • Farmgate • Operators not wanting to work together • Self interest • Distance between attractions • Inland vs Coastal needs • Limited understanding of what the region has to offer • Threats to environment • Two different tourism regions • Shire diversity could be negative for individual identity • Funding • Shire planning- changes too often • Politics • Lack of public transport • Large area to coordinate • Tour operators have different routes • Confusing brands- Turquoise Coast/ Moore River/ Sunset Coast/ Northern Valleys

Opportunities

- Changing mindset from competitive to collaborative
- Joint marketing power
- Amalgamation of rural towns to have same agendas
- Diversity
- Tourism Association
- Packaging
- Trip planning
- Co-ordinate activities
- Camel farm- open up for visitors (expansion)
- Farmgate
- Olive farm- open up for visitors (expansion)
- Events
- Strengthen tourism market on coast
- Drive trails
- Strengthen infrastructure on the coast
- Diving the wrecks
- Sharing of staff (Government)
- Networking
- Business operators to have a major input into
- People with disabilities
- Alternative route to Lancelin via Chittering
- Integrate booking systems
- Tourist going with self-drive holidays
- Tourism packages
- Provide tours around all communities
- Tour operators
- Amalgamation of coastal towns to have same agendas
- Uber
- More communication and collaboration with all groups
- Working with Defence Forces
- Public art- infrastructure buildings
- Joining together
- Restructure Shires on basis of like communities (coastal/ agricultural)
- Working with tour operators to provide more experiences; Moore River Tourism Assoc. join/work with Turquoise Coast & Chittering Trail opportunity

Threats

- Shires not willing to work together
- Difficulty in reaching agreement
- Competition between tourism associations
- Complacency
- Tour coaches bypassing
- More bureaucracy
- Lack of tourism operators keen to work together
- Development
- Lose uniqueness of our area
- Lack of focus on individual areas
- Communication could deteriorate
- Decisions made outside community could have negative impact
- Different needs
- Funding
- Advancement of metro area
- Politics
- Sharks
- Lack of volunteers
- High expectations of travellers and need to meet those expectations
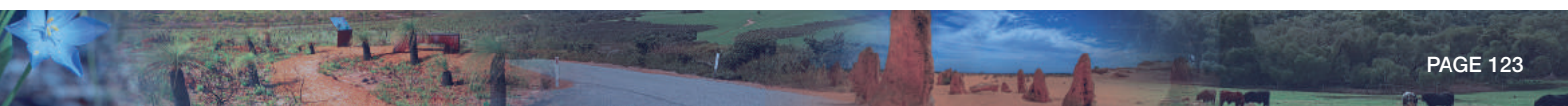
Key Assets and Services

Table 81. **Shire of Gingin Workshops, Key Assets and Services.**

Assets	Services
Railway Station	Triathlon
Seabird Tavern	Ocean Classic
Walk trail	Gala day
Stock Route	CRC
Seawall	Tourist information bay
4WD tracks	Hospitality
ATU track	Accommodation
Observatory	Dump points
Golf club	Ablution blocks
Country clubs	Info bays
Boat ramp	Signage (lacking)
People	Rest points
Tourist Park- Guilderton	Seabird
CU @ Park	Suite of events
Parks	Visitor centres
Gingin Brook	Waste services
Sporting facilities/ recreation	Grounds keeping
Churches	Planning
Beaches	Building & Health
Visitors Centres	Marketing
Moore River	Library
Trails	Rangers
Roads	Road maintenance
Signage	
Caravan Parks	

What's Working/What's Not Working

Table 82. Shire of Gingin Workshops – What's Working/What's Not Working.

Working	Not Working
Day trippers	Businesses working together to promote the region ie Moore River Tourism Assoc.
Motorcycle groups	Brand
British Car Day	Coast vs Country
Events (Ocean Classic)	Lack of member joining
Guilderton (safe, close to Perth)	Lack of productive ideas
Northern Growth Alliance	Development
Natural Assets	Marketing
Energetic People	Business support
Local support	Signage
Vision of local community	Communication between authorities
Enthusiasm of local community	Approval process
Creativity of local community	Transport for tourists
Energy of local community	Accessibility for tourists
Indian Ocean Drive as scenic drive	Digital promotion
Local networking	Digital communication
Day visitors	Gap between stakeholder and decision makers
Natural attractions	Insular approach and consideration towards tourism
Beach attractions	Lack of scenic drive between coastal towns and other communities
4WD	Shop hours (Seasonal)
Sandboarding promotion	No central point of information
Sand dunes (4WD etc)	Maintenance pathways
Moore River	Infrastructure
Parks well maintained	Overnight visitors
Playgrounds	Culinary inconsistency (Availability, Variety)
Skate park	Funding
Festivals etc	Regulatory restrictions
Fishing competitions	Medical availability
Sports groups	Liaise with Shire
Medical centre	Good labour
Volunteers	Midweek tourists
	Management (environment/ foreshore)
	Management of dunes
	Integrated management of coastal towns
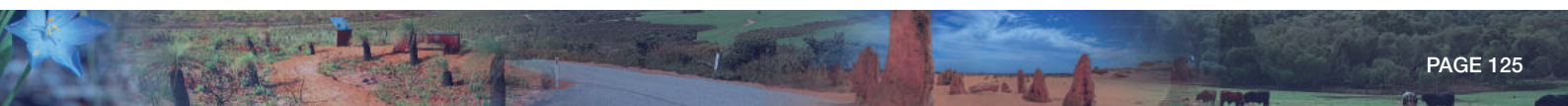
Current Tourism Offering

Table 83. Shire of Gingin Workshops, Key Tourist Activities, Attractions and Events in the Shire of Gingin.

Attractions, Events & Activity	Tourism Category
Gingin Caravan Park	Accommodation/Business
Gingin Hotel	Accommodation/Business/Heritage/Culinary
Sandy Lake Farm animals	Accommodation/Farm/Business
Brookside Accommodation	Accommodation/Business
Willow Brook Caravan Park	Accommodation/Business/Farm/Heritage
Back to Nature Caravan Park	Accommodation/Business/Nature based
Moore River Caravan Park	Accommodation/Business
Seabird Caravan Park	Accommodation/Business
Ledge Point Big 4 Caravan Park	Accommodation/Business
Lancelin Caravan Park development	Accommodation/Business/Sport
Lancelin Inn	Accommodation/Business/Cultural/Culinary
Jessie's Cottage	Accommodation/Business
Gingin B&B	Accommodation/Business
Tuppin House	Accommodation/Business/Education
Moore Beach Houses	Accommodation/Business
Branchy's Cottages	Accommodation/Business
Country Value Holiday Accommodation	Accommodation/Business
Railway Station Gingin	Culinary/Business/Heritage/Conservation
West Coast Honey	Culinary/Business/Conservation
Brook Trail	Nature based
Granville Park	Nature based/Ecotourism/Heritage
Three Bridges Trail	Nature based
Jim Gordon Trail	Nature based/Heritage
Wildflowers @ Gingin Cemetery	Nature based/Ecotourism/Conservation
Waterwheel	Heritage
CU @ Park	Culinary/Business/Heritage
Philby's Cottage	Heritage
Ashworth's Cottage	Heritage
Road Board Building	Heritage
Churches & Cemeteries	Heritage/Religious/Cultural
Regan's Ridge Olives	Culinary/Business
Cheriton Valley	Nature based
British Car Day	Events/Festival/Cultural/Heritage
Triathlon	Events
Markets	Events/Culinary
Bull sale	Events/Farm
Gravity Discovery Centre & Observatory	Voluntourism/Astrotourism/Nature based/Education
ANZAC Day Dawn Service	Heritage
Caledonia Mini Golf	Culinary/Business/Sport

Neergabby Fireworks	Events
Old North Stock Route	Heritage
Moore River	Heritage/Indigenous/Education
Woodridge Spring Fair	Events
Guilderton	Indigenous/Education
Canoeing	Nature based/Sport/Adventure/Marine
Moore River Cruises	Nature based /Business/Marine
Fishing	Nature based/Sport/Marine
Sandboarding	Nature based/Sport/Adventure
Boardwalks	Nature based/Sport
Guilderton foreshore	Nature based
Seabird Tavern	Culinary/Business
Guilderton Lighthouse	Heritage
Lancelin Ocean Classic	Events/Sport/Adventure/Marine
Erosion rock wall	Conservation
Beach/ Bays	Nature based/Sport/Adventure
Country club/ golf/ lawn bowls	Culinary/Business/Sport
Lancelin crayfish	Culinary/Business/Marine
Off road dunes	Nature based/Sport/Adventure
Lancelin dunes/ astrophotography	Nature based/Astrotourism/Adventure
Picnics in the park	Events
Lancelin sports	Sport
Tavern	Culinary/Business
Mogumber Mission	Heritage/Indigenous/Conservation/Education
Gingin Shale Fossils	Heritage/Geotourism
Junction Hotel	Heritage
Heritage trail	Heritage/Cultural/Religious
Visitors Centre	Education
Art in the Park	Events/Festival/Cultural
Guru Fruit	Agricultural
Riseborough	Agricultural/Cultural/Culinary
Café Verge	Culinary
Guilderton Caravan Park	Accommodation/Business
Moore River Tours	Nature based/Adventure
West Coast Heli Science	Adventure
Diving- shipwrecks	Adventure/Marine
Lancelin Tavern	Culinary/Cultural
Moore River Trails	Nature based
Vineyards	Culinary
Heritage	Heritage
Coastal Activities	Nature based/Adventure
Farm stays	Accommodation/Farm/Business
Scenic Drives	Conservation

Gala Day	Event
Shipwreck History	Education/Heritage
Clay Pigeon Shooting	Sport
Golf	Sport
Sand dunes	Nature based/Adventure
Historical Railways	Heritage/Education
Olive Farms	Culinary/Business/Agriculture
Endeavour Tavern	Culinary/Business
4WD beach access/ sand dunes	Nature based/Sport/Adventure
Windsurfing/ Kite surfing	Nature based/Sport/Adventure
Surfing	Nature based/Sport
Colour run	Events/Sport
Fete	Events
Sandcastle comp	Events
Polocrosse	Events
Horse trail ride	Nature based/Sport/Adventure
Willowbrook farm	Accommodation/Business/Farm/Heritage
Deep sea diving	Sport/Adventure/Marine
Dolphins	Marine/Nature based
Reel force charting	Marine/Sport/Business
Walking trails	Heritage/Nature based
Farm stays	Farm/Accommodation
Neergabby stop over	Nature Based
Guilderton mouth river activities	Nature Based/Sport
Jetty	Marine
Parks in town	Nature based
Lookouts	Nature based
Surf Beaches	Nature based/Marine
Dive trails	Adventure/Marine
Walking and cycle paths	Nature based/Sport
WIFI	Virtual
Restaurants & Cafes	Culinary/Business
Endeavour & LBH tavern and hotel	Culinary/Business
Bicycle and sandboarding hire	Business/Sport
Kayak Hire and yoga on the beach	Business/Sport
Festivals	Festivals
Nilgen Nature Reserve & Look out	Nature based
Bird watching	Nature based/Sport
Sea lion & dolphin watching	Adventure/Nature based/Marine
Natural environment	Nature based/Wildlife
Churches	Religious/Heritage
Photography	Nature based/Ecotourism/Heritage
Art exhibitions	Cultural/Event

Buskers Festival	Festival/Event
Party in the park	Festival/Event
Skate park	Sport
Camp drafts	Agritourism
Bull sales	Agritourism/Event
Wildlife viewing at islands	Nature based/Ecotourism
Hiking	Nature based/Ecotourism/Sport/Adventure
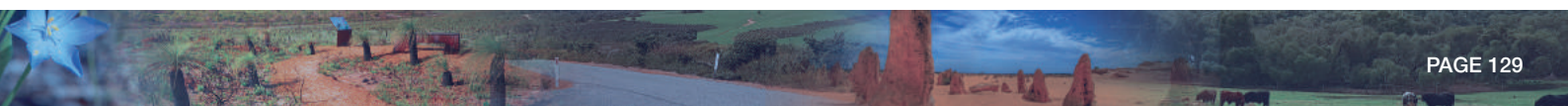
Identified Tourism Gap Areas

Gap areas in the tourism offering were then identified (Table 84) based on the number of tourism product available per category as identified through stakeholder interviews and workshop participation:

Table 84. Shire of Gingin Workshops, Numbers of Product Offering per Tourism Category.

Tourism Category	Number of Activities, Attractions, Events
Adventure	18
Agri-tourism	5
Astro-tourism	2
Business	38
Conservation	6
Culinary	21
Cultural	7
Discovery	0
Ecotourism	6
Education	8
Event	18
Experience	0
Farm	6
Festival	5
Geotourism	1
Health and Wellness	0
Heritage	27
Indigenous	3
Nature Based	40
Marine	13
Religious	3
Sport	27
Trail	0
Virtual	1
Voluntourism	1

Gap areas were identified on the lowest total number of activities, attractions and events in each of the tourism categories. The key gap areas with a potential to increase visitation to the Shire of Gingin were identified as:

- Adventure,

- Astro-tourism,

- Festivals,

- Health and Wellness,

- Indigenous, which had not been identified as a current tourism product offering.

A number of gap areas were identified in the course of stakeholder interviews and workshop discussions which have been included in the short, medium and long term actions and projects for the Shire of Gingin, Section 9.
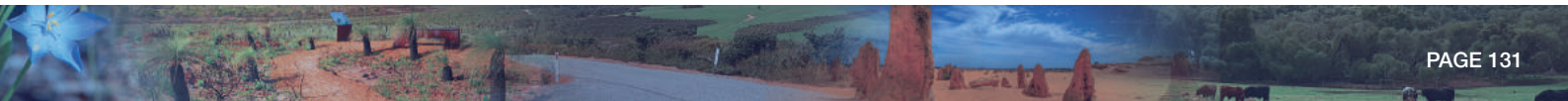
Section 9

Key Areas of Opportunity

Section 9 – Key Areas of Opportunity

Feedback received from stakeholder interviews (Appendix 2) and through workshops has been collated and opportunities have been identified as short, medium and long term actions and projects. Action and project identification is tabled below for each of the Shires, followed by projects identified for the Alliance (more than one Shire).

Funding

There are a number of opportunities for Federal and State funding to support product development:

- **Department of Infrastructure, Regional Development and Cities – Building Better Regions Funds,** $641M has been allocated to create jobs, drive economic growth and build stronger regional communities into the future. There are two streams of funding available under the program:

  » Infrastructure Projects Stream

  » Community Investments Stream.

   Round 4 to be open in 2019.

- **Wheatbelt Development Commission – Regional Economic Development Scheme.** The grants will support individual projects that promote sustainable jobs, partnerships, productivity, skills and capability, as well as stimulate new investment and industry diversification. The State Government's Royalties for Regions program has invested $22.5 million towards the RED Grants program as part of the 2018/19 State Budget. An amount of $6.25 million has been allocated for the first round of RED Grants to be evenly split across the nine RDCs. Applications are assessed under a competitive merit based process. Each of the RDCs will manage the grant round process for their region, and will provide advice to applicants during the application process. Eligible applicants can apply for RED Grant funding of up to $250,000 for individual projects.

- **LotteryWest.** A number of funding opportunities are available through LotteryWest:

  » Big ideas,

  » Heritage and conservation,

  » Projects,

  » Regional performing arts,

  » Trails.

Shire of Chittering

Table 85. Shire of Chittering, Tourism Potential, Short Term Actions and Projects.

Short Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Action	Seek support from tour bus companies for additional coaches to the Shire of Chittering	N/A	Shire and key agencies to collaborate with tour bus companies to increase number of coaches to the Shire, including visits to vineyards and key tourist attractions.	Shire of Chittering - Economic Development Strategy	Immediate – 19/20 contracting year currently being negotiated	Nil
Action	Implementation of overarching governance structure	N/A	To promote and advocate tourism to the NGA region, represent on advocacy issues, and provide a high level of support for the tourism industry across the Shires.	WDC	6 – 12 months	To be determined
Action	Networking for partnerships and collaboration	N/A	Networking or online forum for social exchange and to impart information on future events to avoid the possibility of duplicity or conflict of dates, opportunity for collaboration and co-operation, and discussion of tourism related trends impacting on the Shires.	Alliance Shires, WDC, Chittering Visitor Centre Strategic Plan	6 – 12 months	Nil
Action	Tourism statistical reliability	N/A	Align tourism statistical data collection with those from TRA to obtain both reliable and valid statistics.	TRA	6 – 12 months	Nil
Project/ Action	Collaboration for Accommodation providers	Accommodation	Develop an accommodation network and registration through the Visitor Centre which lists all accommodation in the Shire, including AirBnB.	Chittering Visitor Centre Strategic Plan, Shire of Chittering – Strategic Community Plan	6 – 12 months	Nil

Table 86. Shire of Chittering, Tourism Potential, Medium Term Actions and Projects.

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Indigenous content	Indigenous	Incorporate Indigenous tourism content to supplement the current tourism offering; support from Margaret Drayton for historical and anthropological interpretation.	Tourism 2020, State Planning Strategy 2050, State Government Strategy for Tourism in WA 2020, DCA, TWA Heritage Tourism Strategy Shire of Chittering – Economic Development Strategy	1 – 2 years	$20,000
Project	Festivals/ Events	Festivals/ Events	Develop additional festivals and events to support the Taste of Chittering event for annual planner, including country music and farmers markets.	State Planning Strategy 2050, TWA – Taste 2020, WDC, Shire of Chittering – Economic Development Strategy & Strategic Community Plan	1 – 2 years	$20,000 per event with support from Regional Events Scheme
Project	Nature Play	Adventure Tourism Eco-tourism	Develop an event to encourage kids to explore nature.	State Planning Strategy 2050, State Government Strategy for Tourism in WA 2020, DLGSCI	1 – 2 years	Up to $15,000 per event

Table 87. Shire of Chittering, Tourism Potential, Long Term Actions and Projects.

Long Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Explore adventure tourism opportunities	Adventure	Determine feasibility of adventure tourism opportunities: • Flying fox, • BMX/ Motocross, • Billycart rally (Crest Hill Road), • Super challenge, • Mountain bikes, • Snow sports, • Kayak- turtle man, • Scenic flights- ultra lights, • Ballooning, • Hovercraft, • Horse riding.	State Planning Strategy 2050, Shire of Chittering – Economic Development Strategy, Mountain Bike Trails Master Plan	2 – 3 years	$20,000
Project	Ecotourism	Ecotourism	Support development of guided and self-guided tours: • Lake tours, • Wildlife centre (CWC) in Julimar, • Expand of school groups, • Nocturnal tours/ day tours, • Citizen science projects.	Shire of Chittering – Strategic Community Plan	2 – 3 years	$25,000
Project	Develop Farmgate and food producers co-op	Agriculture Culinary Tourism	Identify and develop an outlet for farmgate and food producers' co-op for local producers including crafts and wine.	TWA - Taste 2020	3 – 5 years	$40,000
Project	Development of a Wellness retreat	Wellness/ Medical	Identify potential sites for wellness and medical retreat.	State Planning Strategy 2050	3 – 5 years	$40,000 Potential for private investment.
Project	Explore accommodation options	Accommodation/ Eco retreats/ Glamping tents	Identify potential sites for eco accommodation and glamping tents and feasibility of development.	Tourism 2020, State Planning Strategy 2050	3 – 5 years	$40,000. Potential for private investment.

Shire of Dandaragan

Table 88. Shire of Dandaragan, Tourism Potential, Short Term Actions and Projects.

Short Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Action	Seek support from tour bus companies for additional coaches to the Jurien Bay	N/A	Shire and key agencies to collaborate with tour bus companies to increase number of coaches to stop in Jurien Bay when visiting the Pinnacles.	State Government Strategy for Tourism in WA 2020	Immediate – 19/20 contracting year currently being negotiated	Nil
Action	Collaboration for Accommodation providers	N/A	Develop an accommodation network and registration through the Visitor Centre which lists all accommodation in the Shire, including AirBnB.	Shire of Dandaragan – Community Development Plan & Local Tourism Planning Strategy	6 – 12 months	Nil
Project	Develop 'day tours' to enhance the day tour and coach tour market to the Shire	N/A	Develop an array of tours which could capture varying markets: • Wildflowers, • Farm Stay, • Windfarm, • Wine, • Farm Tours, • Stargazing nights at Aggies or Yallalie crater.	Shire of Dandaragan – Local Tourism Planning Strategy	6 – 12 months	Nil
Action	Marketing and communication	N/A	Develop a marketing and communication strategy which incorporates all activities in the Shire and is on all social media platforms.	RDA Wheatbelt Regional Plan 2013 - 2018	6 – 12 months	Nil
Action	Signage audit	N/A	Missing signs for Sandy Cape, Jurien Bay distance markers from Brand Highway to Indian Ocean Drive		6 – 12 months	$25,000
Action	Provide information at information bay at Jurien East Road from Brand Highway (coach stop)	N/A	Currently no information at the information bay at the coach stop at Jurien East Road Road. Develop an appropriate sign consistent with Shire bays.		6 – 12 months	$20,000

Table 89. Shire of Dandaragan, Tourism Potential, Medium Term Actions and Projects.

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Develop apps for current brochures	N/A	Various brochures providing information on trails can be developed in to apps ie. shipwreck coast, diving trail.		1 – 2 years	$50,000
Project	Develop farm tours which provide an educational forum for children and adults.	Agritourism	Develop an array of tours which could capture varying markets: • Shearing, • Damper, • Working dogs, • Fruit picking, • Camel milking, • Lamb feeding, • Camp fires, • Berry farms, • Olive press.	State Planning Strategy 2050, TWA – Taste 2020 Shire of Dandaragan – Corporate Business Plan & Strategic Community Plan	1 – 2 years	Private investment from appropriate industry partners
Project	Develop the Shire as an educational facility where short courses could be conducted to attract visitors.	Educational	• Distilling/ essential oils, • Farming/ horticulture, • Environment , • Science, • Heritage, • Night sky, • Geo tourism, • Renewable energy.	State Planning Strategy 2050, Shire of Dandaragan – Corporate Business Plan & Strategic Community Plan	1 – 2 years	Partner with education providers and private businesses
Project	Develop wellness and medicine tours and stays.	Wellness and Medicine	• Soul healing through nature, • Get people to live in country, • Wellness pamper weekend, (yoga, beauty etc) • Health retreat, • Yoga, • Gils/ aromatherapy, • Detox.	State Planning Strategy 2050	1 – 2 years	Partner with private businesses
Project	Develop culinary tours and agritourism.	Culinary Tourism Agritourism	• Capitalising on fresh produce: • Paddock to plate with local produce, • Markets, • Restaurants, • Tours.	TWA – Taste 2020	1 – 2 years	Provide assistance to local businesses
Project	Develop major events for day trippers and overnighters	Festivals/ Events	• Festival of nature, • Dandaragan 100- cycling, • Continue with Opera in the Pinnacles, • Source additional opportunities such as Roman Rudnytsky (pianist), • Wild harvest festivals.	State Planning Strategy 2050, TWA – Taste 2020,	1 – 2 years	Seek support (financial etc) of various agencies to assist in the co-ordination of events
Project	Develop eco trails	Ecotourism	Develop additional trails to support current trails, ie red gums.	State Planning Strategy 2050,	1 – 2 years	Nil

| Project | Proceed with excavation work and trail development | Military heritage | • Support the continuation of excavation and heritage works at North Head Radar Station 48.
• Development of a military heritage trail with low impact carrying capacity linking the coast with the hinterland. | State Planning Strategy 2050, TWA – Heritage Tourism Strategy | 1 – 2 years | $50,000 |
| Project | Completion of the Turquoise Way Path | Sport Tourism | Seek funding and complete Stage 2 comprising 14.5kms from Hill River to Cervantes completing the Turquoise Way Path from Jurien Bay. | State Planning Strategy 2050, Shire of Dandaragan – Local Tourism Planning Strategy | 1 – 2 years | $2.5M |

Table 90. Shire of Dandaragan, Tourism Potential, Long Term Actions and Projects.

Long Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Develop virtual and augmented reality	Technology	• Virtual skydive, • Heritage, • Mining, • Windfarm, • Astro.		2 – 5 years	$50,000
Project	Develop additional accommodation	Accommodation	Seek private investment in establishing a glamping industry.	Tourism 2020, State Planning Strategy 2050, WDC – Central Midlands Sub-regional Economic Strategy, Shire of Dandaragan Local Tourism Planning Strategy	2 – 5 years	$250,000
Project	Develop educational tours on farms.	Agritourism/ Education	• Museum/ display machinery, • Traditional craftsman such as blacksmith, horse shoeing, • Culinary ie. milk cow, butter, damper.	TWA – Taste 2020	2 – 5 years	Provide assistance to local businesses to support
Project	Building of solar panel renewable energy plant in iconic shape	N/A	Develop the next solar panel renewable energy plant in the shape of iconic flora or fauna which can be viewed from a platform or overhead when flying.		3 – 5 years	Various energy companies.
Project	App with recordings/ aboriginal story telling of different pin points within the Shire.	Indigenous/ Technology	Develop story-telling of Aboriginal historical information	State Planning Strategy 2050, State Government Strategy for Tourism in WA 2020, DCA, Jurien Bay Growth Plan	2 – 5 years	$40,000

Project	Introduction of cruise ships as an alternative destination/port	Cruise	Seek support of the cruise ship industry to dock at Jurien Bay for day trips to Jurien, Cervantes, Pinnacles, Caves, trails.	State Planning Strategy 2050, Shire of Dandaragan – Local Tourism Planning Strategy	2 – 5 years	Seek support of Department of Transport and Tourism WA
Project	Development of tourism at Wedge and Grey	Cultural tourism Indigenous tourism Eco-tourism	In consultation with appropriate departments, consideration for feasibility and development of cultural, Indigenous and eco-tourism	State Planning Strategy 2050, DCA, DBCA, TWA – Heritage Tourism Strategy,		

Shire of Gingin

Table 91. Shire of Gingin, Tourism Potential, Short Term Actions and Projects.

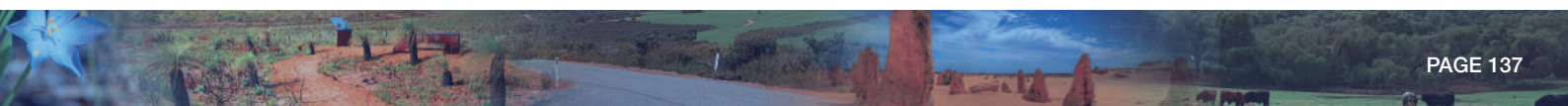| Short Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Develop farm experiences and tours; promote self-drive.	Agritourism Astrotourism Culinary Tourism	Farm stay to experience : • Shearing: • Sheep, • Alpacas, • Milking cows, • Horse riding, • Chickens: • Collect eggs • Ducks, • Quad biking, • Learn to drive a tractor, • Pick your own fruit and/or vegetables, • From seed to table: • Blueberry farm, • Citrus, • Vegetables. • Long table lunch or BBQ, • Stargazing, • Camp fire music.	State Planning Strategy 2050, TWA – Taste 2020	Up to 12 months	Seek private businesses to invest, and provide support.
Action	Business Promotion	N/A	Provide support for any tourism business to be promoted through the Visitor Centres, and Community Resource Centres.		Up to 12 months	Nil
Action	Fast track business	N/A	Provide support to small and medium businesses to fast track approvals process.	Tourism 2020	Up to 12 months	Nil
Action	Set up and assistance for small business	N/A	Assistance for small business to establish themselves in the market.	Tourism 2020	Up to 12 months	Nil
Action	Encourage tourism to Gingin	N/A	Work with other Visitor Centres and agencies to promote tourism to the Shire.	WDC	Up to 12 months	Nil
Action	Seek support from tour bus companies for additional coaches to the Shire of Gingin	N/A	Shire and key agencies to collaborate with tour bus companies to increase number of coaches to the Shire, including visits for agritourism.	State Government Strategy for Tourism in WA 2020	Up to 12 months	Nil
Action	Signage at Guilderton Visitor Centre	N/A	Erect signage at Guilderton Visitor Centre to inform visitors to the facility.		6 – 12 months	$5,000

Table 92. Shire of Dandaragan, Tourism Potential, Medium Term Actions and Projects.

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Small business development office/ officer	N/A	Seek support of the Small Business Development Commission to introduce an office/officer to the Shire to support new and small business development.		1 to 2 years	tba
Project	Provide public transport	N/A	Seek support of Department of Transport to develop a public transport route from link, or linkages from main towns including Wanneroo and Ellen Brook.	State Government Strategy for Tourism in WA 2020	1 to 2 years	tba
Project	Food trails	Culinary Agritourism	Develop food trails through the Shire which support the agricultural industry.	TWA – Taste 2020	1 to 2 years	$50,000

Table 93. Shire of Gingin, Tourism Potential, Long Term Actions and Projects.

Long Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Bike trails	Ecotourism	Develop bike trails throughout the Shire.	State Planning Strategy 2050,	2 to 5 years	$60,000

Northern Growth Alliance

Projects including more than one Shire in the Alliance.

Table 94. Northern Growth Alliance, Tourism Potential, Short Term Actions and Projects.

Short Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Brand development		Further consultation and development of branding for the Alliance from current brand development.		Up to 12 months	$2,500

Table 95. Northern Growth Alliance, Tourism Potential, Medium Term Actions and Projects.

Medium Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Military Trails	Military/ Heritage Tourism	Development of military trails through the Shires of Dandaragan and Gingin exploring the military camps from WWII, including military archaeology and site interpretation.	State Planning Strategy 2050, TWA – Heritage Tourism Strategy,	1 – 2 years	$60,000
Project	Seafood Tourist Trail	Culinary Tourism	Inclusion into the Seafood Tourist Trail as proposed by the WA Fishing Industry Council.	Tourism 2020, State Planning Strategy 2050, TWA – Taste 2020	1 – 2 years	Nil
Project	Shipwreck Trail	Marine Tourism	Based on the Shipwrecks of the Coast, development of a trail which provides boaties and land dwellers interpretation on shipwrecks along the coast.	State Planning Strategy 2050, TWA – Heritage Tourism Strategy	1 – 2 years	$60,000

Table 96. Northern Growth Alliance, Tourism Potential, Short Term Actions and Projects.

Long Term Actions and Projects						
Action/ Project	Description	Tourism Category	Details	Agency Alignment	Timeframe	Budget
Project	Moore Food Trail	Culinary Tourism	Development of a culinary/ food trail through the Shires for visitors to explore the regions 'food bowl'.	State Planning Strategy 2050, TWA – Taste 2020	2 – 5 years	$80,000
Project	Moore Heritage Trail	Heritage Tourism	Development of a heritage trail through the Shires based on heritage sites which are available for public viewing (Appendix 3).	State Planning Strategy 2050, TWA – Heritage Tourism Strategy	2 – 5 years	$250,000

Section 10

Challenges Impeding Tourism Development

Section 10 – Challenges Impeding Tourism Development

There are a number of economic and environmental factors which are currently impeding tourism development in the Shires:

- **Coastal erosion:** Effecting the Shires of Dandaragan and Gingin, the Government of Western Australia is currently working to projection of a 0.9m sea level rise by 2110 which represents a loss of 1m for each centimetre rise in sea level. This will have immediate effect on the coastal towns of Seabird, Ledge Point, Lancelin, Wedge, Grey, Cervantes and Jurien Bay with shoreline erosion, housing, park and road loss, and beach vulnerability.

- **Migration of limesand dunes:** The Western Australian coastline between Lancelin and Sandy Cape contains modern coastal sand dunes: Sandy Cape Dune, north of Jurien Bay; Grey Dune located immediately northeast of the former coastal settlement of Grey and adjacent to Indian Ocean Drive; Wedge Island Dunes; and Lancelin Dune. Each of these dunes has the potential to impact on current or future infrastructure. Therefore stabilisation of the dunes is imperative to prevent the dunes becoming geohazards and impacting on socio-economic and environmental development.
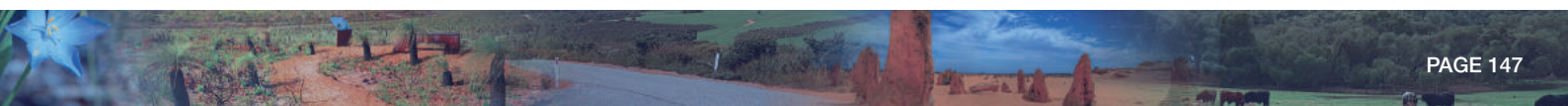
Section 11

Marketing and Branding

Section 11 – Marketing and Branding

Current Analysis

The Shires of Chittering, Dandaragan and Gingin are marketed nationally and globally by a number of agencies.

Tourism Australia markets Australian on an international level. The marketing campaigns released in 2018 include a series of 'Dundee' videos released in the United States of America, the first released during the American Super Bowl with an audience reach of over 100M and the second released in October, and 'Undiscover' which is targeted at the high value travellers from the South East Asian market – Singapore, Malaysia, Indonesia and India.

At a state level, TWA promotes WA to both the domestic and international audience. The 'Experience Extraordinary' campaign has evolved to incorporate the 'Just Another Day in WA' brand. The most recently released tourism campaign to capture and increase market share through TWA is 'Western Australia: The road trip state'. This campaign is targeted to the Asia markets of Singapore, Malaysia, China, Hong King, Japan and Indonesia, as well as Germany, the United Kingdom and New Zealand.

The Alliance Shires are marketed through two of the five RTO's – Experience Perth (Shire of Chittering) and Coral Coast (Shires of Dandaragan and Gingin) who each market their unique destinations to attract and increase visitor numbers and length of stay through print and TV advertising, digital marketing and advertising, packages and offers, creation of a Holiday Planner and many cooperative campaigns.

On a local level, the VC's located in each of the Shires have the fundamental role of acting as the Local Tourism Organisation (LTO) covering promotion and marketing, as well as visitor information and services. They are financially supported by the Shires with complementary revenue received through commissions, merchandise sales and membership fees to market and promote the region. They each have online presence, however at varying degrees of online media strategy.

Branding Impacting on the Alliance

The current brands employed by tourism based organisations in the region are as diverse as the different positions and roles they employ.

When reviewed collectively, a strong cohesive unifying element reflecting the personality of the brands was not evident, with the wider regional and state brands generic in their offering. This assessment was confirmed when the current brands were discussed with stakeholders during the marketing and branding workshop.

The brands reviewed are listed in Table 97 and assessed against the following criteria:

- Focus,

- Offering,

- Position,

- Personality,

- Engagement.

Northern Growth Alliance Destination Branding

Two workshops were conducted on 28 May and 21 June 2018 with key tourism stakeholders from the NGA region providing background on destination branding and examining the process required to create a successful brand. The workshop focused on identifying a clear vision that would identify the Shires of Chittering, Dandaragan and Gingin as a destination and assist in the development of the brand and the tourism marketing strategy.

The workshops were attended by 42 participants. Feedback and responses to three fact-finding activities helped to collectively define the essence of a tourism focused brand. The workshop also successfully produced a brief for the creative engagement of this brand. This work was undertaken by Flametree Creative with the results detailed below.

An outline of the workshop is provided below highlighting the process by which the brand was created and development of conclusions.

Objectives

The objectives of the workshop were to provide participants with insights into the branding process and make decisions necessary to progress the brand development and its alignment with the marketing strategy. Key elements discussed were:

- **Destination branding** - Understand what is destination branding and why do we need it?

- **How we do it** - Explain the process of creating a brand.

- **Budget** - Establishing a budget allows for realistic targeting of a strategy to achieve the brand objectives.

- **Brief -** This is the major component of the workshop which defines the identity for the destination and gives a clear vision in the form of a written brief that focuses creative input to produce the engagement tools necessary to meet the brand objectives.

- **Strategy** - Explore and share any opportunities that have come to light through the review process and examine how these may impact on the branding and influence the engagement process.

- **Measures -** Establish the criteria with which to measure the effectiveness of the brand and in so doing establish benchmarks for performance with set dates for this to occur.

- **Review** - Review the performance and make adjustments to the strategy as circumstances change.

Brand objectives

When creating a new brand the first questions to ask is - ***what are the brands objectives?*** In this case it was important to establish if a new brand was needed and what the perceived benefits could be. When asked if the current tourism brand offerings for the NGA region were sufficient, the majority of stakeholders agreed improvements could be made in the following areas:

- **Consistency** - current offerings are not unified in their approach, diluting their impact,

- **Personality** - giving mixed messages owing to the different purposes of existing brands, and focus on different offerings,

- **Values** - lacking a shared set of values,

- **Targeting** - existing brands often too narrowly focused, and not identifying a unified audience,

- **Inclusive** - were made for specific purposes, therefore not realising the potential opportunities offered by the Alliance of the three shires,

- **Dated**- many of the existing brands have aged and do not speak to a contemporary audience,

- **Quality** – Many of the local brands were under resourced or created in an ad-hoc manner.

The workshop attendees were in agreement that a new tourism branding would serve to deliver the following benefits:

- **Unity** - provide a unified identity for marketing all of the Alliance area's tourism activities,

- **Message** - convey a clear message identifying the unique positioning,

- **Imagery** - display a visual identity representative of the destination,

- **External recognition** - gain greater recognition with increased frequency of use across all tourism offerings,

- **Internal recognition** - build increased awareness among local residents,

- **Consistency** - guided by the style guide, the brand will communicate in a uniform manner each time it is used,

- **Accessibility** - the brand and its assets will be readily accessible and easy to use,

- **Personality** - communicate the destination's personality across all media.

These benefits will allow for a more focused external perception of the Alliance area's tourism. It will also encourage ownership and uptake of the brand by stakeholders which will be necessary to ensure successful engagement.

The majority of stakeholders supported producing a brand that could be used in a broader scope for just the three Alliance Shires and may extend to neighbouring regions that could provide synergistic opportunities.

Destination Branding

Destination branding identifies the unique identity and personality of a destination that makes it different from all competitive destinations. In creating the brand we have provided:

- Defined means for all stakeholders to consistently communicate the values of a destination in a unified manner,

- Tool-set for communicating a destinations' offerings to a target audience,

- Way of differentiating a destination from competing destinations,

- Symbol, name, phrase, colour, type, style and tone that expresses the brand personality.

During the workshop all of the tourism brands assessed in Table 97 were discussed in relation to their delivery of the above and ability to identify the unique identity and personality of a destination that makes it different from other competitive destinations. It was agreed that existing brands did not carry the unique identity and personality that a 'tourism alliance' representing the Chittering, Dandaragan and Gingin Shires would require and that a new brand would be desirable.
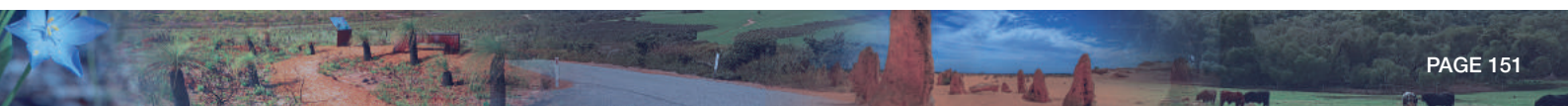
Table 97. Tourism Brand Assessment.

NORTHERN GROWTH ALLIANCE **CURRENT TOURIST BRANDS - ASSESMENT**

	ORGANISATION	FOCUS	OFFERING	POSITION	PERSONALITY	ENGAGEMENT
	Tourism Australia	Domestic and international prospective visitors.	Destination Australia.	There's nothing like Australia.	Friendly, genuine, unique, happy.	Professional, effective, targeted and well resourced.
	Tourism WA	Domestic and international prospective visitors to WA.	Destination Western Australia - offering many different experiences.	Experience the extraordinary.	Understated, happy, fun, genuine, easygoing.	Great recent campaign (just another day in WA) logo dated, typography dated, image library terrific, well resourced, wide reach.
	Tourism Council	Domestic tourist industry.	West Australian tourism activities - broad brush.	The voice of tourism Western Australia.	Professional, corporate, efficient, ambitious.	Targeted membership.
	Western Australian Indigenous tourists Operators Council	Indigenous tourist operators.	Promotes authentic cultural experiences at a state, national and international level.	Western Australian Indigenous Tourists Operators Council.	Bright, vibrant, descriptive, informative.	Prescribed, formulaic, dated, predictable, busy.
	Shire of Chittering	Focus is on all the Shires of Chittering's activities.	Promoting the Shire of Chittering as a region in all areas of economic development.	Keeping the balance.	Confident, strong, friendly country, natural, warm.	Consistent, resourceful, organised, engagement. Regionally focused. Works well within many business areas.
	Shire of Gingin	Focus is on all the Shire's of Gingin's activities.	Promoting the Shire of Gingin as a region in all areas of economic development.	History. Beauty. Prosperity.	Colourful, descriptive, dated, official, amateur.	A business-like approach. Somewhat dated, in-house not professional looking and lacing character.
	Shire of Dandaragan	Focus is on all the Shire's of Dandaragan's activities.	Promoting the Shire of Dandaragan as a region in all areas of economic development.	The Pinnacle of the Turquoise Coast.	Busy, informative, rural, traditional, local, diverse.	The brandmark is dated, busy and doesn't read well. Positioning statement laboured. Turquoise Coast tourism not on brand. Generally aged approach.
	Discover Golden Horizons Western Australia	Targeting tourism via Perth to Bindoon, Calingiri, Dalwallinu, Moora, New Norcia, Wongan Hills.	Promoting self drive tours, art and heritage and the region's natural environment.	Discover Golden Horizon.	V Busy, energetic, friendly, happy fun.	Thoughtful and focused engagement. Simple clean website. Efficient - brandmark a bit busy.
	Moore River Region	Holiday makers to the Moore river region from Midland to Jurian Bay.	Information about a diverse range of offerings from a wide variety of destinations.	Whatever you want.	Fun, casual, energetic, busy.	Brand mark scratchy - hard to use effectively. Uses technology and social media well, good image bank.
	Turquoise Coast Visitor Centre	Promoting tourism along the Turquoise Coast (sometimes inland) centred around Jurian Bay.	Information, and promotion of a variety of activities and places to stay	Turquoise Coast Visitor Centre.	Clean, active, nature loving, fresh, exciting.	Govt formula logo, limited resources but utilising great imagery. Organised and efficient.
	Guilderton visitor Centre	Guilderton and lower Moore river.	Tourism, advocacy and promotion of the Guilderton and lower Moore river area.	-	Old fashioned, official, dry, reliable.	Dry, efficient and uninspiring. Appears under resourced.
	Tourism Chittering	Tourists visiting from Perth - in association with surrounding areas.	Natural attractions, foods and beverages, places to stay and general promotion of the Chittering region.	So near Perth, yet so Country!	Confident, strong, friendly country, natural, warm.	Graphically strong, but visually could communicate better. Poor web presence.
	Community resource centres - area specific	A hub of community information, activities and services.	Provides a resource hub for community information, activities and services.	The location - in this case 'Dandaragan'.	Lively, connective, energetic, professional.	Varies widely from region to region, eg Gingin no digital presence but Jurian Bay communicates professionally.

Figure 5. The Brief for the Northern Growth Alliance.

the Brief

Engagement

Inclusive Authentic Ethical
Spirited Innovative Authentic — **Values**

Easy going, Relaxed, Exciting, Adventurous, Curious, Dynamically creative, Different, Individualised, Rugged, Neighbourly, Natural, Spacious, Real — **Personality**

Moore adventure, Moore history, Moore culture - the Yuet way, Moore than a holiday, Moore than meets the eye, Moore for less — **Position**

Day drives from Perth, Coast and beaches, Local food and beverages, Pinnacles, Coastal towns, Stargazing/gravity centre, Fishing, Adventure (a range of activities), History, Flora and fauna, Events — **Offering**

Adventure tourists, Self-drive interstate and intrastate, Family friends visitation, International travel - (Germany, United Kingdom, France, Singapore), Perth locals — **Audience**

The Brief

An objective of the workshop was to define a clear vision for creating a new brand for the 'tourism alliance' which would answer the following questions, allowing us to create a targeted meaningful engagement that would work in with a marketing strategy:

- Who is the audience?

- What is our unique offering/s?

- How do we position ourselves?

- What is our personality?

- What values do we live by?

A series of discussions and three group activities provided the following results.

Audience

This was discussed in the marketing workshop. The group confirmed our audience as:

- Adventure tourists,

- Self-drive interstate and intrastate,

- Family friends visitation,

- International travel - Germany, United Kingdom, France, Singapore,

- Perth locals.

As a group activity the unique offerings were listed by participants at the marketing workshop and a shortlist formed. There were many offerings worthy of featuring but it was not possible to highlight one as a stand-out offering. Both groups agreed on the most important, these being:

- Day drives from Perth,

- Coast and beaches,

- Local food and beverages,

- Pinnacles,

- Coastal towns,

- Stargazing/Gravity Centre,

- Fishing,

- Adventure (a range of activities),

- History,

- Flora and fauna,

- Events.
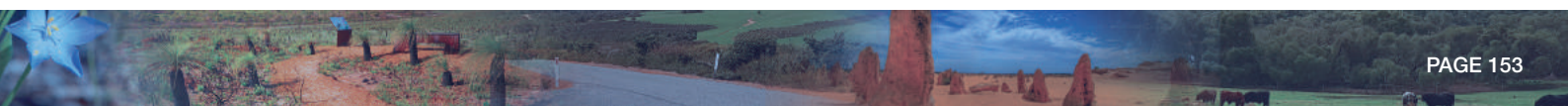
Personality

When asked what personality the tourism organisation should enjoy the following attributes were agreed upon - both groups producing overlapping or similar results:

- Easy going,

- Relaxed,

- Exciting,

- Adventurous,

- Curious,

- Dynamically creative,

- Different,

- Individualised,

- Rugged,

- Neighbourly,

- Natural,

- Spacious,

- Real.

A naming exercise was conducted where attendees were asked to suggest an appropriate name for the new brand resulted in the following shortlist:

- Northern way,

- Dangin link,

- Northern playground - (play north),

- Danginchi,

- Redhills to sandhills,

- Pinnacles trail,

- Coast to country,

- Bush to beach,

- 3 spirits,

- Natural loop,

- Northern Highways,

- Yued Country.

The name that was chosen as best representing the personality of the brand was 'Moore'.

Moore was the clear favourite, with appeal of the double meaning of Moore seen as being positive, versatile and fitting for all areas of the Alliance. It is concise, has meaning, is memorable and would make for great SEO.

Positioning

Positioning is the act of defining an area's offerings to create an image that occupies a distinctive place in the target market's mind. Examples of other tourist brands were considered and discussed.

Many positioning statements were considered, but when 'Moore' was arrived at, it brought its own positioning possibilities, such as:

- Moore than a playground,
- Moore adventure,
- Moore history,
- Moore culture - the Yued way,
- Moore for less,
- Moore than meets the eye, and Moore for the eye to meet,
- Moore than a holiday,
- Moore smiles,
- Moore ways to relax,
- Want Moore?,
- Moore than you can imagine,
- Like some Moore? (food offerings),
- Moore for everyone,
- Moore choices.

Values

The last activity undertaken by the two groups was a shared values exercise. After a process of grouping and elimination it was agreed that the following six values were worthy attributes that the brand should live by. After the exercise was done with the second group the results from the first group was presented and the following six values were agreed upon:

- Inclusive,
- Authentic,
- Ethical,
- Spirited,
- Innovative,
- Authentic.

The value exercise is an ongoing process and should ideally be revisited as part of a brand review at a future point in time.
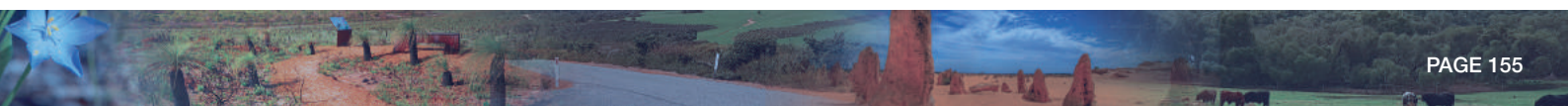
Brand

This feedback established a shared vision and formed the core of a brief that allowed Flametree Creative to take on the 'creative' components of the brand (Images 5-7).

Difficulties of Destination Branding

Defining a well-rounded brief has allowed us to arrive at a sound, targeted engagement. However it should be noted that destination branding has inherent difficulties. The following may negatively affect the implementation of the brand:

- Multi-faceted product or mix of products offered - potential conflicting values (eg. conservation and mining),

- Aligning the interests of many stakeholders,

- Difficulties in shaping the offering to overcome perceived gaps,

- Inability to fund and implement communication of brand strategy.

Three brand concepts are provided:

Image 5. Brand Concept 1.

Image 6. Brand Concept 2.

Image 7. Brand Concept 3.

Further consultation is required to gain consensus on the final brand concept, or to further explore the brief for the Alliance.

Northern Growth Alliance Destination Marketing

Destination Marketing

Destination marketing is the process of communicating with potential visitors to influence their destination preference, intention to travel and ultimately their final destination and product choices. The opportunity to communicate with potential visitors and ultimately capture their attention has a number of opportunities however inconsistent marketing and branding and lack of identity can provide an obstacle in the choice of destination.

There are multiple stages to consider when choosing a destination and the marketing strategy will need to consider all of these (Figure 6).

Figure 6. Multi-staged Approach to Destination Choice.

Goals

Each of the marketing and branding strategy has unique goals which are interrelated to provide a consistent message.

The primary goal of the brand strategy is to establish the unique identity and personality of the NGA that differentiates it from all competitive destinations. The secondary goal is to provide a set of tools that allow brand ambassadors to consistently communicate this across multiple levels of engagement.

The primary goal of the marketing strategy is to raise the profile of the Alliance Shires' resulting in an increase in visitor numbers, length of stay, and economic spend through message consistency.

Review of Key Target Markets

A review of the key agencies' marketing strategies and statistical information was conducted to determine current target markets and status to the visitor market. The identified target markets for the Alliance are outlined in Table 98. The table provides a summary of the target markets, current status and rating of potential of 1 to 5:

1 = new category (new market entry),

2 = underdeveloped (some visitation, lots of potential),

3 = limited (some visitation but room to grow),

4 = established (good visitation but room to grow),

5 = well defined.

Table 98. Key Target Market Status.

Target Market	Current Status	Potential Rating of Shire		
		Chittering	Dandaragan	Gingin
Grey Nomad	Limited	4	4	4
Perth day-tripper	Limited	5	4	5
Perth weekender	Underdeveloped to limited with lots of potential dependent on accommodation investment	3	5	4
Self-drive interstate	Underdeveloped	2	3	3
Self-drive intrastate	Underdeveloped	3	4	4
Business Traveller	Limited market	1	2	2
Visiting Friends and Relatives	Underdeveloped	3	3	3
International (France, Germany & UK)	Limited	3	3	3
International (Singapore)	Limited	3	4	4
Backpackers	Underdeveloped	3	4	4
4WD enthusiasts	Underdeveloped	2	4	4
Event attendees	New category	4	4	4
Adventure tourists	Underdeveloped	2	4	3

Marketing and Branding Outcomes

The marketing and brand strategy will be focused around three main outcomes highlighted in Figure 7 – to increase visitor numbers, extend visitor stay, and improve collaboration and engagement locally. These extend through to the marketing strategy where each outcome will have identified strategies, targets, measures and timeframes outlined in Table 99.

Figure 7. Marketing and Branding Outcomes.

Increase visitor numbers	Extend visitor stay	Collaboration and engagement
Develop marketing techniques to reach target markets	Increase product range	Create tourism alliance
Hero experiences for marketing	Increase destination knowledge	Marketing to locals with destination branding
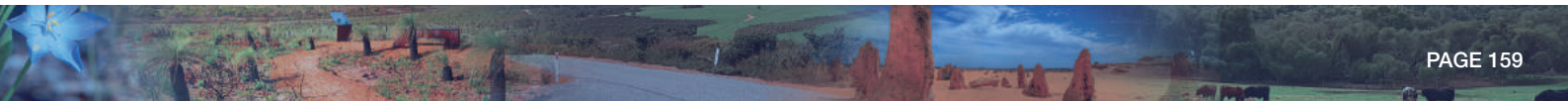
Marketing Strategy

Table 99. Marketing Strategies

Strategies	Measure	Target	Timeframe
Increase Visitor Numbers			
Develop marketing techniques to reach target markets			
Undertake targeted campaigns to support growth in key markets including delivery of direct marketing campaign to tour operators and support gained from regional tourism organisations.	Marketing strategy for the Alliance to be created for new Financial Year.	New tourism strategy to be adopted by the Shires.	To be implemented in 2019/2020.
Itinerary creation - more 3/4 day offerings to be promoted.	Booking numbers – work with attractions to gauge increase.	Increase of 10%.	To be implemented in the next 12 months.
New packages to be developed to include more attractions and experiences.	Booking numbers – work with attractions to gauge increase.	Increase of 10%.	To be implemented in the next 12 months.
Use more Google advertising and remarketing to capture potential visitors.	Google analytics – unique visitors and online bookings.	Increase of 10% in visitors and 5% in bookings.	To be implemented this financial year.
Use social media to collectively provide travellers with something to talk about and to share.	Social statistics, shares, likes and engagement.	Increase of 10%.	To be implemented in the next 12 months.
Bring online influencers and media on familiarisation visits to the Shires to increase PR coverage both on and offline.	Coverage gained.	Minimum one article per influencer.	To be implemented in the next 12 months.
Target niche markets such as adventure tourists and stargazers.	Visitor bookings.	Increase of 10%.	To be implemented in the next 12 months.
Hero experiences for marketing			
Develop a plan of which key experiences will be the brand heroes. Ensure they form the basis of all content creation inside the toolkits.	Form part of the marketing and branding strategy.	Included in the new financial year planning.	To be implemented this financial year.
Work with state tourism organisation to promote these extraordinary experiences.	Social statistics.	Increase in engagement and one post a month by RTO / STO.	To be implemented this financial year.
Create content for each of the hero experiences for use online.	Library of content to be created.	Content calendar to be full and representing the Shires' attractions.	To be implemented this financial year.
Extend Visitor Stay			
Increase product range			
Work with Tourism Alliance to create new product where possible. Use the gap identification to work out where new product is most needed. Work with state organisations to develop this and apply for funding.	Secure funding.	Secure funding to have at least one project implemented.	To be implemented in the next 12 months.
Packaging and Bookability			
Relationships built with Perth tour operators to extend overnight stay.	Booking numbers and new packages deals from Perth on offer.	One new operator on board.	To be implemented in the next 12 months.

Encourage more operators to offer online booking through the VC's.	Number of Visitor Centre members.	Increase of 5% of Visitor Centre members being listed online.	To be implemented this financial year.
Encourage more operators to get set up for international bookings.	Number of operators registered.	Increase of 5% of Visitor Centre members being listed for international bookings.	To be implemented this financial year.
Improve collaboration and engagement locally			
Create Tourism Alliance			
Create an Alliance to champion, manage and oversee tourism between the Shires.	Creation of Tourism Alliance.	First meeting held, chair appointed, constitution created.	To be established this financial year.
Marketing to locals with destination branding			
Increase visitation of visiting friends and relatives market through local education and engagement campaigns.	Campaign conversion results measured on campaign by campaign basis.	Individual results.	To be implemented this financial year.
Hold an 'Explore your own Backyard' event across the Shires where all tourism operators offer entry to locals for free. This helps educate locals about what there is to do and creates community pride.	Press coverage and attendee numbers, social media coverage and engagement.	Minimum of 100 local people attending, social media coverage increasing engagement and reach by 10% month on month.	To be implemented in the next 12 months.
Welcome packs and brochures in all short stay accommodation, AirBNB, caravan parks, at estate agents and through industry companies for new employees.	Packs distributed.	Increase in local footfall / calls to the VC's.	To be implemented this financial year.

Implementation

The draft 'Moore' brand supports the marketing strategy and implementation in providing a consistent message and identity – position, personality, values – which helps extract its unique offerings to be marketed to potential visitors.

The implementation of the marketing and branding strategy has a twofold approach. The first is acceptance by the Alliance of the strategy as part of the broader tourism strategy, or further consultation to fine tune the brand. The second is recommendation that the implementation of the marketing and branding strategy should be overseen by one organisation such as the recommended overarching tourism alliance who would allocate responsibility for key actions or techniques. Both have been developed through a range of community consultation and review of key markets and provide a framework to increase visitation to the Alliance Shires.

Table 100 suggests techniques to be used to implement the marketing strategy.

Table 100. Techniques for Marketing Strategy Implementation

Awareness	Events	Digital	Product	Content/ Distribution	Sales	Partner Marketing	Operations
Messaging	Corporate	Website/blogs	New product	Collateral	Lead nurturing	Tourism and RTO support	Governance
Influencer Relationships	Industry	SEO/SEM	Storytelling of product and experience	Information - maps, guides, itineraries	Customer references	Airlines	Regional development
Branding and advertising	Consumer	Online bookings		Graphic design		Tourism alliance to be formed	Measurement and evaluation
PR	Partner	Consistent imagery			Packaging and bundling		
Internal		Web content creation					
		Social media					
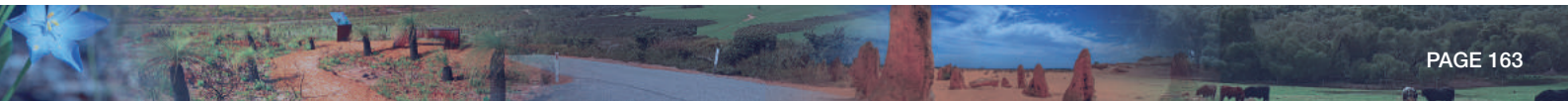
Section 12

Coordination, Governance and Advocacy Mechanisms

Section 12 – Coordination, Governance and Advocacy Mechanisms

Destinations wanting to promote sustainable tourism are more likely to be successful when there is effective governance (Bramwell & Lane, 2012). However, one of the challenges of effective governance of sustainable tourism is that it requires co-ordination and cooperation from a range of key stakeholders across a variety of sectors and policy domains, all with divergent interests and priorities. Tourism co-ordination, governance and advocacy will evolve over time with the changes in community tourism heroes, the changing nature of the political context at the regional, state and federal level, and adaptive policies from government development agencies.

It has been ascertained that there is a number of organisations marketing and promoting both the region and tourism both nationally and internationally as highlighted in Figure 2. Each of these key organisations are governed by a Board and bound by the rules and regulations of State or Federal legislation. The success of collaboration and co-ordination both internally and externally and the ultimate success of the tourism outcome for the Alliance cannot be achieved without specific effort from each of these organisations. However, a review of current strategies of each of these organisations has identified gaps which are detrimental to the growth of tourism – in visitor numbers, length of stay and economic benefit.

Currently there is no one overarching tourism group providing a coordinating or collaborative approach for tourism to the Shires of Chittering, Dandaragan and Gingin. It is therefore recommended that two levels of governance be implemented providing a communication pathway for the local industry (Table 101), and an overarching governance mechanism (Table 102) which represents the tourism industry in general.

The local industry level can provide the basis of cooperation and collaboration between tourism stakeholders, and while informal in nature, has the opportunity to provide feedback as required to the higher level, or overarching governance mechanism. This mechanism would best come under the WDC due to their ongoing support of tourism in the region. The overarching governance structure should be a collaboration of tourism stakeholders from the region providing a compelling and unified voice.

The overarching governance mechanism framework has the opportunity of providing:

- Opportunity to be Shire funded to provide a FTE position and operate as a local tourism organisation,

- Collaborative advertising and marketing for the Alliance Shires,

- Representation at industry events, locally, nationally and internationally,

- Provide support to local tourism businesses and businesses who provide service to tourists,

- Funding support through grant writing and funding opportunities,

- Product development support.

Table 101. Local Industry Level Cooperation Framework

Local Industry Level	
Structure	Informal, proposed under WDC
Communication	Networking or online forum
Purpose	Social exchange - to impart information on future events to avoid the possibility of duplicity or conflict of dates, opportunity for cooperation and collaboration, and discussion of tourism trends impacting the Shires, and discussion on tourism related issues.
Participants	Organisations and businesses from tourism, arts and culture and tourism associated services including but not limited to the Federal and State government and department representatives, Shire Economic Development Officers, VC staff, Chamber members, tourism related businesses,
Convene	Bi-monthly
Resource Implications	Informal notes taken to provide tourism related information to Overarching Governance Mechanism. Suggest online forum resource such as Basecamp providing closed participant accessibility for online discussion between meetings.

Table 102. Overarching Governance Mechanism Framework

Overarching Governance Mechanism	
Structure	Formal, proposed under WDC
Communication	Meetings and/or online forum
Purpose	To promote and advocate tourism for the Alliance shires, represent the Shires on advocacy issues, provide a level of support for the tourism industry in the Region, collaborative advertising and marketing.
Participants	Key tourism stakeholders and industry advocates from the tourism industry including LTO, RTO, VC's, Chambers of Industry, food and beverage and accommodation industries, local Indigenous tourism operators, local government, and special interest groups.
Convene	Bi-monthly following informal local industry level informal meetings
Resource Implications	Review of notes from the local industry level meetings by governance group which could provide the ongoing impetus for developing and advocating tourism to the Shires. Suggest online forum resource such as Basecamp providing closed participant accessibility for online discussion between meetings.

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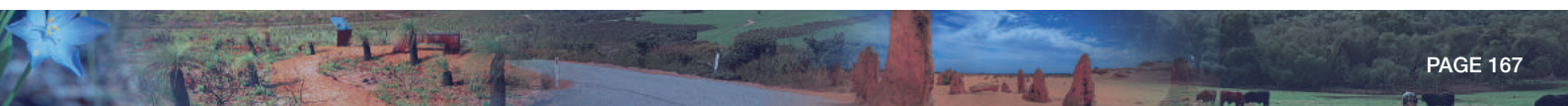
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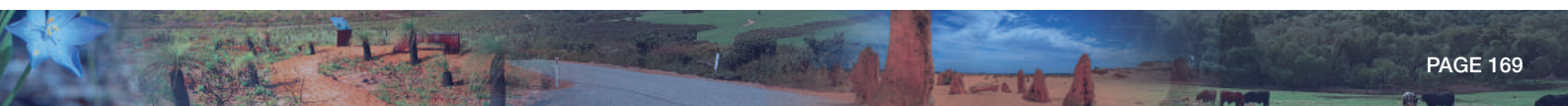
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Image courtesy of the Shire of Dandaragan

Appendix 1: Definitions of industry

ACCOMMODATION AND FOOD SERVICES

The Accommodation and Food Services Division includes units mainly engaged in providing short-term accommodation for visitors. Also included are units mainly engaged in providing food and beverage services, such as the preparation and serving of meals and the serving of alcoholic beverages for consumption by customers, both on and off-site.

AGRICULTURE, FORESTRY AND FISHING

The Agriculture, Forestry and Fishing Division includes units mainly engaged in growing crops, raising animals, growing and harvesting timber, and harvesting fish and other animals from farms or their natural habitats. The division makes a distinction between two basic activities: production and support services to production. Included as production activities are horticulture, livestock production, aquaculture, forestry and logging, and fishing, hunting and trapping.

The term 'agriculture' is used broadly to refer to both the growing and cultivation of horticultural and other crops (excluding forestry), and the controlled breeding, raising or farming of animals (excluding aquaculture).

Aquacultural activities include the controlled breeding, raising or farming of fish, molluscs and crustaceans. Forestry and logging activities include growing, maintaining and harvesting forests, as well as gathering forest products.

Fishing, hunting and trapping includes gathering or catching marine life such as fish or shellfish, or other animals, from their uncontrolled natural environments in water or on land.

Also included in the division are units engaged in providing support services to the units engaged in production activities.

TRANSPORT, POSTAL AND WAREHOUSING

The Transport, Postal and Warehousing Division includes units mainly engaged in providing transportation of passengers and freight by road, rail, water or air. Other transportation activities such as postal services, pipeline transport and scenic and sightseeing transport are included in this division.

Units mainly engaged in providing goods warehousing and storage activities are also included.

The division also includes units mainly engaged in providing support services for the transportation of passengers and freight. These activities include stevedoring services, harbour services, navigation services, airport operations and customs agency services.

RETAIL TRADE

The Retail Trade Division includes units mainly engaged in the purchase and onselling, the commission-based buying, and the commission-based selling of goods, without significant transformation, to the general public. The Retail Trade Division also includes units that purchase and onsell goods to the general public using non-traditional means, including the internet. Units are classified to the Retail Trade Division in the first instance if they buy goods and then onsell them (including on a commission basis) to the general public.

Retail units generally operate from premises located and designed to attract a high volume of walk-in customers, have an extensive display of goods, and/or use mass media advertising designed to attract customers. The display and advertising of goods may be physical or electronic.

Physical display and advertising includes shops, printed catalogues, billboards and print advertisements. Electronic display and advertising includes catalogues, internet websites, television and radio advertisements and infomercials. While non-store retailers, by definition, do not posses the physical characteristics of traditional retail units with a physical shop-front location, these units share the requisite function of the purchasing and onselling of goods to the general public, and are therefore included in this division.

A unit which sells to both businesses and the general public will be classified to the Retail Trade Division if it operates from shop-front premises, arranges and displays stock to attract a high proportion of walk-in customers and utilises mass media advertising to attract customers.

MANUFACTURING

The Manufacturing Division includes units mainly engaged in the physical or chemical transformation of materials, substances or components into new products (except agriculture and construction). The materials, substances or components transformed by units in this division are raw materials that are products of agriculture, forestry, fishing and mining, or products of other manufacturing units.

Units in the Manufacturing Division are often described as plants, factories or mills and characteristically use power-driven machines and other materials-handling equipment. However, units that transform materials, substances or components into new products by hand, or in the unit's home, are also included. Activities undertaken by units incidental to their manufacturing activity, such as selling directly to the consumer products manufactured on the same premises from which they are sold, such as bakeries and custom tailors, are also included in the division. If, in addition to self-produced products, other products that are not manufactured by the same unit are also sold, the rules for the treatment of mixed activities have to be applied and units classified according to their predominant activity.

Assembly of the component parts of manufactured products, either self-produced or purchased from other units, is considered manufacturing. For example, assembly of self-manufactured prefabricated components at a construction site is considered manufacturing, as the assembly is incidental to the manufacturing activity. Conversely, when undertaken as a primary activity, the on-site assembly of components manufactured by others is considered to be construction.

The boundaries between the Manufacturing Division and other divisions in ANZSIC can sometimes be unclear. The units in the Manufacturing Division are engaged in the transformation of materials into new products. Their output is a new product. However, the definition of what constitutes a 'new product' can be somewhat subjective. As clarification, the following activities are examples of manufacturing activities included in the Manufacturing Division in ANZSIC 2006:

- Milk bottling and pasteurising;

- Both processing and canning or bottling;

- Fresh fish packaging (including oyster shucking, fish filleting);

- Printing and related support activities;

- Ready-mixed concrete production;

- Leather tanning and dressing;

- Grinding of lenses to prescription;

- Wood preserving and treatment;

- Electroplating, plating, metal heat treating, and polishing;

- Fabricating signs and advertising displays;

- Tyre retreading;

- Ship, boat, railway rolling stock and aircraft repair and maintenance; and

- Substantial alteration, renovation or reconstruction of goods such as transport equipment.

There are some other activities that are often considered 'manufacturing', but for ANZSIC, these are classified in another division. These activities include:

- Logging and production of crops or livestock (included in the Agriculture, Forestry and Fishing Division);

- Construction of structures and fabricating operations performed at the site of construction by contractors (included in the Construction Division);

- Publishing and the combined activity of publishing and printing (included in the Information Media and Communications Division); and

- Beneficiation (included in the Mining Division).

The subdivisions in the Manufacturing Division generally reflect distinct production processes related to material inputs, production equipment and employee skills.

ARTS AND RECREATION SERVICES

The Arts and Recreation Services Division includes units mainly engaged in the preservation and exhibition of objects and sites of historical, cultural or educational interest; the production of original artistic works and/or participation in live performances, events, or exhibits intended for public viewing; and the operation of facilities or the provision of services that enable patrons to participate in sporting or recreational activities, or to pursue amusement interests.

This division excludes units that are involved in the production, or production and distribution of motion pictures, videos, television programs or television and video commercials. These units are included in the Information Media and Telecommunications Division.

RENTAL, HIRING AND REAL ESTATE SERVICES

The Rental, Hiring and Real Estate Services Division includes units mainly engaged in renting, hiring, or otherwise allowing the use of tangible or intangible assets (except copyrights), and units providing related services.

The assets may be tangible, as in the case of real estate and equipment, or intangible, as in the case with patents and trademarks.

The division also includes units engaged in providing real estate services such as selling, renting and/or buying real estate for others, managing real estate for others and appraising real estate.

WHOLE SALE TRADE

The Wholesale Trade Division includes units mainly engaged in the purchase and onselling, the commission-based buying, and the commission-based selling of goods, without significant transformation, to businesses. Units are classified to the Wholesale Trade Division in the first instance if they buy goods and then onsell them (including on a commission basis) to businesses.

Wholesalers' premises are usually a warehouse or office with little or no display of their goods, large storage facilities, and are not generally located or designed to attract a high proportion of walk-in customers. Wholesaling is often characterised by high value and/or bulk volume transactions, and customers are generally reached through trade-specific contacts.

The Wholesale Trade Division distinguishes two types of wholesalers:

- merchant wholesalers who take title to the goods they sell, including import/export merchants; and

- units whose main activity is the commission-based buying and/or the commission-based selling of goods, acting as wholesale agents or brokers, or business to business electronic markets, both of whom arrange the sale of goods on behalf of others for a commission or fee without taking title to the goods.

A unit which sells to both businesses and the general public will be classified to the Wholesale Trade Division if it operates from premises such as warehouses or offices with little or no display of goods, has large storage facilities, and is not generally located or designed to attract a high proportion of walk-in customers.

For units that have goods manufactured for them on commission and then sell those goods, the following treatment guidelines are to be followed:

- units that own the material inputs and own the final outputs, but have the production done by others will be included in the Manufacturing Division;

- units that do not own the material inputs but own the final outputs and have the production done by others will not be included in the Manufacturing Division (these may be included in Wholesale Trade or other divisions); and

- units that do not own the material inputs, do not own the final outputs but undertake the production for others will be included in the Manufacturing Division.

As a result, units that have goods manufactured for them on commission will be included in the Wholesale Trade Division where they do not own the material inputs to the manufacturing process, but take title to the outputs and sell them in the manner prescribed above for typical wholesaling units.

OTHER SERVICES

The Other Services Division includes a broad range of personal services; religious, civic, professional and other interest group services; selected repair and maintenance activities; and private households employing staff. Units in this division are mainly engaged in providing a range of personal care services, such as hair, beauty and diet and weight management services; providing death care services; promoting or administering religious events or activities; or promoting and defending the interests of their members.

Also included are units mainly engaged in repairing and/or maintaining equipment and machinery (except ships, boats, aircraft, or railway rolling stock) or other items (except buildings); as well as units of private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of households.

The Other Services Division excludes units mainly engaged in providing buildings or dwellings repair and maintenance services (included in the Construction or Administrative and Support Services Divisions as appropriate), and units mainly engaged in providing repair and maintenance services of books, ships, boats, aircraft or railway rolling stock (included in the Manufacturing Division).

EDUCATION AND TRAINING

The Education and Training Division includes units mainly engaged in the provision and support of education and training, except those engaged in the training of animals e.g. dog obedience training, horse training.

Education may be provided in a range of settings, such as educational institutions, the workplace, or the home. Generally, instruction is delivered through face-to-face interaction between teachers/instructors and students, although other means and mediums of delivery, such as by correspondence, radio, television or the internet, may be used.

Education and training is delivered by teachers or instructors who explain, tell or demonstrate a wide variety of subjects. The commonality of processes involved, such as the labour inputs of teachers and instructors, and their subject matter knowledge and teaching expertise, uniquely distinguishes this industry from other industries.

Education support services include a range of support services which assist in the provision of education, such as curriculum setting and examination marking

INFORMATION MEDIA AND TELECOMMUNICATIONS

The Information Media and Telecommunications Division includes units mainly engaged in:

- creating, enhancing and storing information products in media that allows for their dissemination;

- transmitting information products using analogue and digital signals (via electronic, wireless, optical and other means); and

- providing transmission services and/or operating the infrastructure to enable the transmission and storage of information and information products.

Information products are defined as those which are not necessarily tangible, and, unlike traditional goods, are not associated with a particular form. The value of the information products is embedded in their content rather than in the format in which they are distributed. For example, a movie can be screened at a cinema, telecast on television or copied to video for sale or rental. The division includes some activities that primarily create, enhance and disseminate information products, subject to copyright.

It is the intangible nature of the information products which determines their unique dissemination process, which may include via a broadcast, electronic means, or physical form. They do not usually require direct contact between the supplier/producer and the consumer, which distinguishes them from distribution activities included in the Wholesale Trade and Retail Trade Divisions.

Excluded from the division are units mainly engaged in:

- the mass storage or duplication of information products such as printing newspapers, CDs, DVDs, etc. (Manufacturing Division);

- purchasing and on-selling information products in their tangible form (Wholesale Trade and Retail Trade Divisions);

- providing specialised computer services such as programming and systems design services, graphic design services and advertising services, as well as gathering, tabulating and presenting marketing and opinion data (Professional, Scientific and Technical Services Division);

- providing a range of creative artistic activities such as the creation of an artistic original (e.g. a painting), or the provision of a live musical performance by a group or artist (Arts and Recreation Services Division); and

- units undertaking a range of activities such as directing, acting, writing and performing (Arts and Recreation Services Division).

HEALTH CARE AND SOCIAL ASSISTANCE

The Health Care and Social Assistance Division includes units mainly engaged in providing human health care and social assistance. Units engaged in providing these services apply common processes, where the labour inputs of practitioners with the requisite expertise and qualifications are integral to production or service delivery.

CONSTRUCTION

The Construction Division includes units mainly engaged in the construction of buildings and other structures, additions, alterations, reconstruction, installation, and maintenance and repairs of buildings and other structures.

Units engaged in demolition or wrecking of buildings and other structures, and clearing of building sites are included in Division E Construction. It also includes units engaged in blasting, test drilling, landfill, levelling, earthmoving, excavating, land drainage and other land preparation.

MINING

The Mining Division includes units that mainly extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas. The term mining is used in the broad sense to include underground or open cut mining; dredging; quarrying; well operations or evaporation pans; recovery from ore dumps or tailings as well as beneficiation activities (i.e. preparing, including crushing, screening, washing and flotation) and other preparation work customarily performed at the mine site, or as a part of mining activity.

The Mining Division distinguishes two basic activities: mine operation and mining support activities.

Mine operation includes units operating mines, quarries, or oil and gas wells on their own account, or for others on a contract or fee basis, as well as mining sites under development.

Mining support activities include units that perform mining services on a contract or fee basis, and exploration (except geophysical surveying).

Units in the Mining Division are grouped and classified according to the natural resource mined or to be mined. Industries include units that extract natural resources, and/or those that beneficiate the mineral mined. Beneficiation is the process whereby the extracted material is reduced to particles that can be separated into mineral and waste, the former suitable for further processing or direct use. The operations that take place in beneficiation are primarily mechanical, such as grinding, washing, magnetic separation, and centrifugal separation. In contrast, manufacturing operations primarily use chemical and electro-chemical processes, such as electrolysis and distillation.

FINANCIAL AND INSURANCE SERVICES

The Financial and Insurance Services Division includes units mainly engaged in financial transactions involving the creation, liquidation, or change in ownership of financial assets, and/or in facilitating financial transactions.

The range of activities include raising funds by taking deposits and/or issuing securities and, in the process, incurring liabilities; units investing their own funds in a range of financial assets; pooling risk by underwriting insurance and annuities; separately constituted funds engaged in the provision of retirement incomes; and specialised services facilitating or supporting financial intermediation, insurance and employee benefit programs.

Also included in this division are central banking, monetary control and the regulation of financial activities.

PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES

The Professional, Scientific and Technical Services Division includes units mainly engaged in providing professional, scientific and technical services. Units engaged in providing these services apply common processes where labour inputs are integral to the production or service delivery. Units in this division specialise and sell their expertise. In most cases, equipment and materials are not major inputs. The activities undertaken generally require a high level of expertise and training and formal (usually tertiary level) qualifications.

These services include scientific research, architecture, engineering, computer systems design, law, accountancy, advertising, market research, management and other consultancy, veterinary science and professional photography.

Excluded are units mainly engaged in providing health care and social assistance services, which are included in Division Q Health Care and Social Assistance.

ADMINISTRATIVE AND SUPPORT SERVICES

The Administrative and Support Services Division includes units mainly engaged in performing routine support activities for the day-to-day operations of other businesses or organisations.

Units providing administrative support services are mainly engaged in activities such as office administration; hiring and placing personnel for others; preparing documents; taking orders for clients by telephone; providing credit reporting or collecting services; and arranging travel and travel tours.

Units providing other types of support services are mainly engaged in activities such as building and other cleaning services; pest control services; gardening services; and packaging products for others.

The activities undertaken by units in this division are often integral parts of the activities of units found in all sectors of the economy. Recent trends have moved more towards the outsourcing of such non-core activities. The units classified in this division specialise in one or more of these activities and can, therefore, provide services to a variety of clients.

PUBLIC ADMINISTRATION AND SAFETY

The Public Administration and Safety Division includes units mainly engaged in Central, State or Local Government legislative, executive and judicial activities; in providing physical, social, economic and general public safety and security services; and in enforcing regulations. Also included are units of military defence, government representation and international government organisations.

Central, State or Local Government legislative, executive and judicial activities include the setting of policy; the oversight of government programs; collecting revenue to fund government programs; creating statute laws and by-laws; creating case law through the judicial processes of civil, criminal and other courts; and distributing public funds.

The provision of physical, social, economic and general public safety and security services, and enforcing regulations, includes units that provide police services; investigation and security services; fire protection and other emergency services; correctional and detention services; regulatory services; border control; and other public order and safety services.

Also included are units of military defence, government representation and international government organisations.

Government ownership is not a criterion for classification to this industry division. Government units producing 'private sector like' goods and services are classified to the same industry as private sector units engaged in similar activities. Private sector units engaged in public administration or military defence are classified to the Public Administration and Safety Division. Units that engage in a combination of public administration and service delivery activities are to be classified to this division.

ELECTRICITY, GAS, WATER AND WASTE SERVICES

The Electricity, Gas, Water and Waste Services Division comprises units engaged in the provision of electricity; gas through mains systems; water; drainage; and sewage services. This division also includes units mainly engaged in the collection, treatment and disposal of waste materials; remediation of contaminated materials (including land); and materials recovery activities.

Electricity supply activities include the generation, transmission and distribution of electricity and the on-selling of electricity via power distribution systems operated by others.

Gas supply includes the distribution of gas, such as natural gas or liquefied petroleum gas, through mains systems.

Water supply includes the storage, treatment and distribution of water; drainage services include the operation of drainage systems; and sewage services include the collection, treatment and disposal of waste through sewer systems and sewage treatment facilities.

Appendix 2 – Stakeholder Engagement List

Name	Shire
Alison McVee	Gingin
Amy McAuliffe	Chittering
Anita Jarvis	Gingin
Anne Maree Hagge	Chittering
Bella MacKinnon	Chittering
Bob Sheppard	Dandaragan
Bruce Cussen	Chittering
Carol Redford	Gingin
Carolyn Johnson	Gingin
Carrie Edwards	Gingin
Chris Evans	Chittering
Chris Sialtsis	Gingin
Chris Waldie	Chittering
Colleen Osborn	Chittering
Craig Hyne	Gingin
Craig Spencer	Chittering
Dianne Miller	Gingin
Faye Paull	Gingin
Frank Johnson	Gingin
Frank Peczka	Gingin
Heather Hatch	Gingin
Helen Taylor	Chittering
Jacqui Lobb	Gingin
Jaime Stokke	Gingin
Jan Court	Gingin
Jenny Johnson	Chittering
Jill Charles	Chittering
Karri-Skye Holland	Dandaragan
Louise Szczepanski	Gingin
Maria Jane Holland	Dandaragan
Marnie Giroud	Chittering
Michelle Perkins	Dandaragan
Mike Miller	Gingin
Norm and Marie Crane	Gingin
Quentin Hearn	Chittering
Reg Cocking	Gingin
Rosemaree Cunningham	Chittering
Russell Kernahan	Gingin

Name	Shire
Sam Collard	Gingin
Scott Clayton	Dandaragan
Steve Wells	Dandaragan
Tamieka Preston	Chittering
Tony Sangalli	Gingin
Vivienne du Plessis	Chittering
Zack Sheppard	Dandaragan

Appendix 3 – Heritage Listings

Gingin

Government Buildings | Church/Religion/Cemetery | Transport

Name of Place	Grade	Post Office	Railway	Hotel/ Inn	Church	Indigenous	Farm	Roads/ bridges	Memorial	House	Municipal
Gingin Post Office	A	✓									
Gingin Railway Station & Quarters	A		✓								
St Luke's Anglican Church, Cemetery & Belfry	A				✓						
Mogumber Mission & Cemetery	A				✓	✓					
Old North Road Stock Route	A							✓			
Old Junction Bridge	A							✓			
Gingin War Memorial	B								✓		
Gingin Road Board Office	B										✓
Gingin Hotel	B			✓							
Granville Homestead & Park	B						✓				
Uniting Church	B				✓						
PWD Road	B							✓			
Gingin School Site	C										
Gingin Cemeter	C				✓						
House 7 Brook St	C										
Gingin Argicultural Hall Site	C										
Headmasters House (fmr) CWA	C										
Police station Site	C										✓
The Horseshoe (Police Paddock)	C										✓
Gingin Golf Club	C										
Gingin Oval & Swimming Pool	C										
Three Bridges Site	C							✓			
Linden Park	C										
Good Templars Hall Site	C				✓						
Bambun Lake Site	C										
Beermullah Race Course Site	C										
Beermullah School Site	C										
Harris House	C										
Limestone Caves Site	C										
Old Bridge Site	C							✓			
Fernwood Site	C										
Moore River School	C										
Honeywood	C										
Dacresfield Site	C										
Strathalbyn	C										
Whakea	C										
Mount Ginginup Site	C										
Molecap Hill Quarry Site	C										
Charltons Mill Site	C										
Creaton Site	C										
Eclipse Hill Site	C										
One tree hill Site	C										
Gingin race course aite	C										
Casuarina stone quarry site	C										
Guilderton Caravan Park	C										
Caraban	C										
Boobabbie Crosiing Site	C										
Creek House Site	C										
Lancelin Scout Hall	C										
Lancelin School (fmr) Surf Shack	C										
Our Lady of Fatima Church	C				✓						
Lancelin Jetty	C										
Plaque Frederick Smith	C										
Lancelin Sand dunes Site	C										
Timothy's Clump site, Ocean Farm	C										

Present use	Ownership		IMP / INV/REP			Picture Link	Other Notes
	Private	Government	IMP	INV	REP		
Post Office		✓					
Café, gift shop and interpretive centre							National Trust- leased to Gingin Lions Club
Vacant							
Walking/ ride trail							
Hotel							
CU@Park, Café, public park							
Church							
Road		✓					

Gingin (cont.)

Government Buildings   Church/Religion/Cemetery   Transport

Name of Place	Grade	Post Office	Railway	Hotel/ Inn	Church	Indigenous	Farm	Roads/ bridges	Memorial	House	Municipal
Ashby	C										
Cockram's Hhotel site	C			✓							
Mooliabeenie townsite site	C										■
Bulgurra site	C										
Chitna	C										
Junction Hall site	C										■
woodloses site	C										
Nolans Bridge site	C							■			
Greenwood	C										
Millbank site	C										
Horseworks flour Mill	C						✓				
Cowalla Homestead Group	A						✓				
Cheriton	B									✓	
Philbey's Cottage	C									✓	
Mrs Jones Cottage	C									✓	
Tipperton Site	C									✓	
House 6 Church St	C									✓	
Ashworth Cottage	C									✓	
House 15 Constable St	C									✓	
House 4 Daw St	C									✓	
House 17 Fraser St	C									✓	
House 21 Fraser St	C									✓	
House 2 Lefroy St	C									✓	
House 10 Lefroy St	C									✓	
House 38 Lefroy St	C									✓	
Bandy's Cottage & Swamp Garden Site	C									✓	
Ralph Dewar's Home Site	C									✓	
WS Dewar's Home Site	C									✓	
Tuppin House	C									✓	
Army Camp sites	C										
Railway Hotel	A		✓	✓							
St Lukes Rectory	A				✓						
Old Junction Hotel	A			✓			✓				
Moondah Homestead	A						✓				
St Catherines Roman Catholic Church	B				✓						
Orange Springs	B									✓	
Cleveland	B									✓	
Beedamanup Homestead	B			✓							
Downa (house & graveyard)	B									✓	

Present use	Ownership		IMP / INV/REP			Picture Link	Other Notes
	Private	Government	IMP	INV	REP		
Residence and working farm							
Private Residence	✓						
Private Residence	✓						
Private Residence	✓						
?	✓						
Church	✓						Franciascan fathers of Midland
Residence	✓						
Residence	✓						
Vacant	✓						
Willowbrrok Farm, Caravan Park	✓						

Appendix 3 – Heritage Listings

Chittering

Legend: School Themed, Church Themed, Transport Themed, Farm/Home, Gov/Hall

Name of Place	Grade	TownSite	School	Hall	Mining	Post Office	Hotel/ Inn	Railway	Church/ Cemetery	Indigenous	Farm/ Homestead	Roads/ bridges	Memorial	House/ Cottage	Store	Sports	Transport
Old Muchea Well	2																✓
Water supply- bores & tanks	4										✓						
Former School house	4		■														
Muchea Hall & Site	4			✓													
Wannamal Community Hall	4			✓													
Sandlewood Pool	5															✓	
Mooliabeenie railway precinct	5							✓									✓
Mooliabeenie shop & well	5														✓		
Mooliabeenie churchyard- graves	5								✓								
Cullulla siding (robbery)	5							✓									✓
Mooliabeenie school & house site	5		✓														
Tennis courts (99-MB-16)	5															✓	
Muchea Railway Precinct	5							✓									
Anglican Church	5								✓								
Chittering & Muchea Race club	5															✓	
Sandown Park	5															✓	
Air Raid Shelters (dog walk area)	5																
Wannamal Hall 1	5			✓													
Wannamal Post Office 1	5					✓											
Wannamel School 1	5		✓														
Wannamel School 2	5		✓														
Railway trolley tragedy	5							✓									
Original plains road	5											✓					✓
Chittering Roads Board Office (fmr)	1																
Endersley	1																
holy Trinity Anglican Church & Cemetery	2								✓								
Lakeside'	3																
Goyamin'	3																
Clarina'	3																
Hillview' Lefroy homestead & graves	4										✓						
Green Acres' (PO & Sth Bin Ph exch)	4					✓											
Cottage Farm'	4										✓						
inaminika (Haslem)	4																
twin Pines'	4																
Lower Chittering PO &PH exch 'Belle Vista'	4					✓											
Lower Chittering Sports Ground & Community Centre	4															✓	
Ferguson's cottage	5										■						
Burroloo wells & sawmill	5										■						
Chittering staging post/tearooms	5					■											
Chittering State School & qtrs (orig Upper)	5		■														
Old Acres' homestead & tennis courts	5										■						
Chittering tennis courts	5																
Graves (Hart, Hopper, King, Summers)	5								■								
Upper Chittering PO & PH Exch	5					■											
Hoopers gold mine	5																
Egerton' formerly 'Sunset'	5																
Lower Chittering School & Hall	5		■														
Bindoon Hall	2			✓													
Greenside' Fewster's	4										✓			✓			
Shire administration Office & site of tennis courts	4																
Bindoon School	4		✓														
Community Housing	4													✓			
Former site of Ferfusons house, well, mill, tennis and netball courts	5													✓		✓	
Rechichi Rd	5											✓					✓
Catholic Agricultural College (Keaney College)	1		✓														
Claremont Cottage/ b's smith/ well	2													✓			

| Category | | | | | Ownership | | | IMP / INV/REP | | | | |
Communication	Ruins	Military	Municipal	Present use	Private	Public Access	Government	IMP	INV	REP	Picture Link	Other Notes
						R	✓					Owned by Main Road Dept
							✓					Owned by Water Corp
			✓	Community Hall		R	✓					Ownered by Shire
				Community Hall		R	✓					Ownered by Shire
						R						Vacant land
						R	✓					Owned by Westrail
						R						
						R	✓					Owned by Westrail
				Site		R	✓					
						R	✓					Owned by Shire
				Railway Line		R	✓					Owned by Westrail
				Vacant Site		R	✓					Owned by Shire
						R						
						R	✓					Vested in Shire
		✓					✓					Owned by Shire
				Tennis court and cricket pitch		R	✓					Vested by Shire
				Site		R	✓					Vested by Shire
				Vacant Site		R	✓					Owned by Shire
				Traveller Facilities		R	✓					Owned by Shire
			✓									
				Community Hall/ Meeting Place		R	✓					Restricted Access
					?	R	?					
			✓	Shire Admin, Library, Council chambers		R	✓					Resticted Access
				School		R	✓					Resticted Access
				Residental		R	✓					Owned by Shire
				chinkabee Sporting Complex		R	✓					Restricted Access
						R	✓					Owned by Main Road Dept
				Agricultural College	✓	R						Owned by Christian Bros trustees
				Tearoom/ Art gallery	✓	R						Restricted to business hours

Appendix 3 – Heritage Listings

Chittering (cont.)

School Themed | Church Themed | Transport Themed | Farm/Home | Gov/Hall

Name of Place	Grade	TownSite	School	Hall	Mining	Post Office	Hotel/ Inn	Railway	Church/ Cemetery	Indigenous	Farm/ Homestead	Roads/ bridges	Memorial	House/ Cottage	Store	Sports	Transport
Oringal ' bindoon house' & flour mill ruins	2										✓						
Karim- Catholic Chapel & Cemetery	3								✓								
Prospect Farm'	3										✓						
Castle Hill'	3													✓			
Bindoon General Store	4														✓		
Bindoon Agencies	4														✓		
Bindoon Post Office/ ph exch	4					✓											
Former Edmond's house	4													✓			
Gray's old house	4													✓			
Fromson house, Moreton Bay Fig	4													✓			
former Chittering Country Club	4															✓	
Lakeside' house & abattoir	4													✓			
Kay's place (Baker's Acres)	4													✓			
Kay's orange trees/ house	4													✓			
Granny Kay's Cottage	4													✓			
Bindoon Country Inn	4						✓										
A deMarkie's	4													✓			
Doubleview'	4													✓			
Greg Stephen's	4													✓			
Brooklands' Eric Stephens	4													✓			
Mooramurra' (springmount)	4										✓			✓			
Mapleton Valley Homestead'	4										✓						
Glen Gully	4													✓			
Spring Valley'	4										✓			✓			
Richard Glover's barn	4										✓						
Cyril Glovers	4													✓			
Paddy Thompson;s house	4													✓			
Hillview'	4										✓			✓			
Dan Read's	4													✓			
Munchea Store & old house	4										✓			✓	✓		
Timber Mill & House	4													✓			
Stonyburn Lodge	4													✓			
House (56-M13) Archibald st	4													✓			
House (57-M14) Carl St	4													✓			
Muchea Roadhouse	4						✓								✓		
Wannamal Community paper box	4																
West point" 1 & (2-ruin)	4										✓			✓			
Sylvania' Cocking's ruins	4													✓			
Wannamal Well (Shannon's)	4																
Daleview	4										✓			✓			
Tirano Villa' (Udumung)	4													✓			
Old Cyril Page's house	4													✓			
Greenwood' 'Rosedale' ruins	4													✓			
Olive Hill	4													✓			
Chinkabee tearooms	5						✓										
Blacksmith	5																✓
South Bindoon School/ rec reserve	5		✓														
Bindoon Saw Mill (swan timber Co)	5										✓						
Soldier Settlement blocks	5													✓			
Godfrey's and pepper trees	5										✓			✓			
Brockhill'	5										✓			✓			
Mooliabeenie air strip	5																✓
Mooliabeenie rifle range	5																
Orig Chittering Roads Board offcie	5																
Wards Saw Mill	5										✓						
Mooliabeenie tennis court	5															✓	

Category Category				Present use	Ownership			IMP / INV/REP			Picture Link	Other Notes
Communication	Ruins	Military	Municipal		Private	Public Acces	Government	IMP	INV	REP		
				Ruin	✓	R						
				Cemetery	✓	R						Owned by Roman Cathoilc Church
				Shed	✓	R						
					✓	R						
				General store/ liquor store	✓	R						Resticted to opening hours
				Garage/ agency	✓	R						Resticted Access
				Dwelling	✓	R						Resticted Access
				Dwelling	✓	R						Resticted Access
				Dwelling	✓	R						
				Dwelling	✓	R						
				Private function facility	✓	R						
				Vacant	✓	R						
				Dwelling	✓	R						
				Dwelling	✓	R						
				Dwelling- Vacant	✓							
				Hotel/ Motel	✓	R						
				dwelling	✓	R						
				Dwelling	✓	R						
				Dwelling	✓	R						
				Dwelling	✓	R						
					✓	R						
				Dwelling	✓	R						
				Occasional Dwelling	✓	R						
				Dwelling	✓	R						
				Barn	✓	R						
				Vacant	✓	R						
				Vacant	✓	R						
				Vacant	✓	R						
				Vacant	✓	R						
				Shop	✓	R						
				Site/ Houses	✓	R						
				Dwelling	✓	R						
				Dwelling	✓	R						
				Dwelling	✓	R						
				Dwelling/ Roadhouse	✓	R						
✓					✓	R						Owned by CALM
	✓			Ruin	✓	R						
	✓			Ruin	✓	R						
					✓	R						Owned by CALM
				Occasional Dwelling	✓	R						
				Dwelling	✓	R						
				Vacant	✓	R						
✓					✓	R						
				Vacant	✓	R						
				St John Ambulance Sub Centre	✓	R						Restricted Acess- Owned by SJA
					✓	R						
				Site	✓	R						
					✓	R						
					✓	R						
				Site	✓	R						
					✓	R						
		✓		Disused Airstrip		R	✓					Owned by Commonwealth Gov
		✓		Rifle range		R	✓					Owned by Commonwealth Gov
			✓	Site	✓	R						
					✓	R						
				Site	✓	R						

Chittering (cont.)

School Themed | Church Themed | Transport Themed | Farm/Home | Gov/Hall

Name of Place	Grade	TownSite	School	Hall	Mining	Post Office	Hotel/ Inn	Railway	Church/ Cemetery	Indigenous	Farm/ Homestead	Roads/ bridges	Memorial	House/ Cottage	Store	Sports	Transport
Greenhills' - 'Ranger valley'	5													✓			
Bindoon Race Club- racecourse	5															✓	
Bindoon Rock	5												✓				
Van Ooran's house	5										✓			✓			
Old Muchea Bakery'	5														✓		
Orig Muchea Store- Philmorres	5														✓		
Muchea School	5		✓														
Muchea School 1905-1952	5		✓														
Muchea tracking station	5																
Muchea Cemetery	5								✓								
War tme air strip	5																
Muchela'- Moore	5													✓			
Grass tree industry	5										✓						
Muchela'- Moore	5													✓			
Grass tree industry	5										✓						
Irrigation channel sites	5																
Wandena Quarries	5				✓												
Tiwest	5				✓												
Wannamal Townsite	5	✓															
Wannamal store	5														✓		
Eatha Springs- 'Romany'	5													✓			
West Vale	5										✓						
Marvel Hill'	5													✓			
Bushgrove	5										✓			✓			
Haresfield (Leesons)	5													✓			
Nirranda 1	5													✓			
Cowara Hills' 1 & 2	5										✓			✓			
Udumung Spring	5										✓						
Snake Springs	5													✓			
Ellisford'	5					✓								✓			

Communication	Ruins	Military	Municipal	Present use	Private	Public Access	Government	IMP	INV	REP	Picture Link	Other Notes
				Site	✓	R						
					✓	R						
					✓	R						
					✓	R						
				Demolished	✓	R						Demolished
					✓	R						
				Vacant Site	✓	R						Owned by Uniting Church
				Dwelling	✓	R						
✓				Rilfe Range	✓	R	✓					Owned by RAAF
				Private residence & Protea Plantation	✓	R						
		✓			✓	R						
					✓	R						
		✓			✓	R	✓					Owned by RAAF
					✓	R						
		✓			✓	R	✓					Owned by RAAF
					✓	R						
				Clay pits	✓	R						Varous Onwers (Midland Brick)
					✓	R						
					✓	R						
				Ruin	✓	R						
	✓			Ruins	✓	R						
	✓			Vacant Ruins	✓	R						
	✓			Vacant Ruins	✓	R						
	✓			Ruins	✓	R						
	✓			Vacant Ruins	✓	R						
					✓	R						
				Vacant	✓	R						
					✓	R						
					✓	R						
				Dwelling	✓	R						

Appendix 3 – Heritage Listings

Dandaragan

Legend: Town | Nature | Agriculture | Church/Religion/Cemetry

Name of Place	Grade	Stock Route	Post Office	School	lookout	Church/ Cemetery	Indigenous	Farm/ Homestead	Jetty	Townsite	House/ Cottage	Police Station	Fishing	Lighthouse	Army	Memorial	Municipal
St Anne's Church	1					✓											
Wolba Cottage	1							✓			✓						
Bartle Memorial	2															✓	
Dandaragan Shire Office	3																✓
Lang Lookout	3				✓												
Ross's Jetty	3								✓								
Co-op Jetty	3								✓								
Aboriginal Houses	4						✓										
Dandaragan Cemetery	4					✓											
Dandaragan Catholic Cemetery	4					✓											
Regans Ford- River Crossing & Tennis Court Site	4																
Old Badgingarra Townsite	4									✓							
Cattle Yards (near Hill River)	4							✓									
Tuart stand	4				✓	✓											
Eatha Springs	4	✓															
Diamond of the Desert	4	✓															
Tennis Courts Site	4																
Army Sites	4																
Old Jetty Site	4								✓								
Escape Island Lighthouse	1													✓			
First Jetty (Cervantes)	3								✓								
Original Jurien School Site	4			✓													
Site of All Saviours Church	4					✓											
Cacker Ally	4												✓				
Middle Head Fresh Water Sub-Marine Spring	4																
Coastal Stock Route Rd N 301	4	✓															
Dandaragan Primary School- First school rooms	3			✓													
Badgingarra Research Station	3							✓									
Original Jurien Hall	3																✓
Road Board Hall Site	4																✓
Processing Factory Site	4												✓				
Drovers' Cave	4	✓															
Yathroo Homestead and Outbuildings	1							✓			✓						
Radar Installation Site	1														✓		
Glen Lark	2							✓									
Former Post & Telegraph Office and Quarters	2		✓														
Dalguring	2							✓									
Noondel	2							✓									
Manomet's Cottage	2										✓						
Wandilla	3							✓									
Blue Gum Cottage	3										✓						
Badgingarra Homestead & Pool	3							✓									
Lang House	3										✓						
Axedale	3							✓			✓						
First Police Station	3											✓					

Present use	Ownership			IMP / INV/REP			Picture Link	Other Notes
	Private	Public Access	Government	IMP	INV	REP		
church/ Playgroup/ Local newspaper office		✓						
Community Crafts		✓						
		✓						
Shire Office		✓						
		✓						
Jetty/ Recreational fishing		✓						
Jetty/ Recreational fishing		✓						
Residence		✓						
Cemetery		✓						
Cemetery		✓						
		✓						
		✓						
Not n use		✓						
		✓						
		✓						
		✓						
								Nothing Remains
			✓					Nothing Remains
ruins		✓						
Lighthouse		?						
		?						Access unknown
		?						Access unknown
Site only		?						Access unknown
		?						access unknown
		?						
		?						access unknown
School		R						R: Restricted Access
Research Station		R						R:Restricted Access
		R						Restricted Access
		P						Occupided
		R						restricted access
		R						restricted access
Homestead and outbuildings	✓							
	✓							
Residence	✓							
Residence	✓							
Residence	✓							
	✓							
Not in use	✓							
Residence	✓							
Not in use	✓							
Shearers Accommodation	✓							
Residence	✓							
Residence	✓							
	✓							

Appendix 3 – Heritage Listings

Dandaragan (cont.)

◼ Town   ◼ Nature   ◼ Agriculture   ◼ Church/Religion/Cemetry

Name of Place	Grade	Stock Route	Post Office	School	lookout	Church/ Cemetery	Indigenous	Farm/ Homestead	Jetty	Townsite	House/ Cottage	Police Station	Fishing	Lighthouse	Army	Memorial	Municipal
Mrs Lindsay's last house	3										✓						
Yere Yere (Yearia)	4							✓									
Chelsea Homestead	4							✓									
Kolburn	4							✓									
Vine Cottage Site	4							✓									
Farmhouse Site (Regans Ford)	4							✓									
Caro Grave Site	4					✓											
Site of Mrs Lindsay's Cottage and Shed	4										✓						

Present use	Ownership			IMP / INV/REP			Picture Link	Other Notes
	Private	Public Access	Government	IMP	INV	REP		
Residence	✓							
Homestead and outbuildings	✓							
Not in use	✓							
	✓							
	✓							
	✓							
	✓							
Site only	✓							