



# Karratha Destination Management Plan

October 2018

Prepared for the City of Karratha

STAFFORD  
STRATEGY

City of  
Karratha





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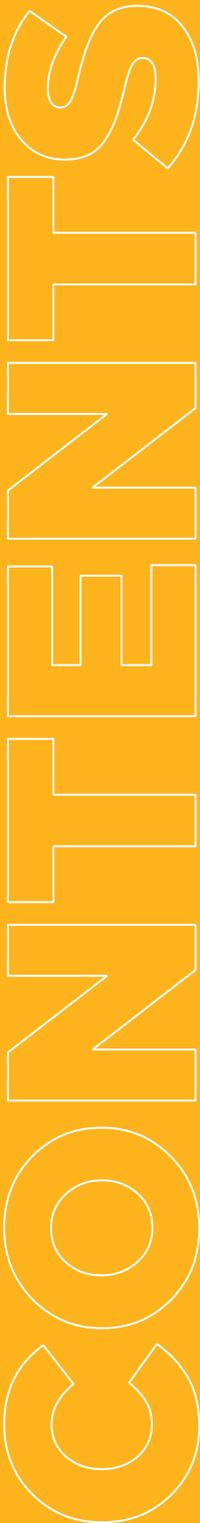
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# 1. Executive Summary

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## 1.1. Introduction

Stafford Strategy (Stafford) was commissioned by the City of Karratha (Council) to develop a destination management plan (DMP) for Karratha. The purpose of the DMP is to identify opportunities and strategies for strengthening the local tourism industry and growing the visitor economy overall.

This is a plan for the whole tourism industry, from solo operators right through to larger businesses, associations and all levels of government. It takes the broadest possible scope, recognising many types of businesses are part of the visitor economy. Additionally, it reflects that Council has previously undertaken various plans and strategies to try and activate the visitor economy.

## 1.2. Why a DMP?

This DMP has been developed to:

- help grow the visitor economy on a sustainable basis, to diversify Karratha's economic base which is very heavily mining/resource based;
- offer solutions to challenges facing Karratha to support sustainable visitor growth from a broader market base;
- identify new development and related solutions to attract investment and grow economic benefits, such as employment;
- support future funding bids for specific projects, including WA State Government funding opportunities;
- support marketing activities to help increase visitor demand for Karratha; and
- help build stronger local community awareness of the importance and value of the visitor economy.

## 1.3. Karratha's visitor economy

Karratha is primarily known throughout Australia as a significant mining town and the capital of the Pilbara Region. The desire to diversify Karratha's economic base is driven by the recognition that the mining industry is highly cyclical and that developing and growing new industries, such as the visitor economy, can provide for greater economic stability and diversification.

Figure 1 provides a summary of Karratha's current visitor economy<sup>1</sup> and demonstrates that:

- visitation to Karratha has grown over the past few years, increasing by 82% (168k);
- just over half of the visitors (51%) are domestic overnight visitors<sup>2</sup>;
- the overnight visitor markets for Karratha (both domestic and international) are far higher yielding than the day trip market: while representing 55% of total visitation to Karratha, the overnight market generates 89% of all spend;
- Karratha currently ranks second in terms of total holiday visitation when compared with eight other LGAs in Australia's North West region; and
- there are currently 802 jobs attributed to the visitor economy in Karratha (5.3% of all employment in the LGA).

---

<sup>1</sup> All data is sourced from the International Visitor Survey and the National Visitor Survey as provided by Tourism Research Australia

<sup>2</sup> An estimated 80% of all jobs in mining and the resource sector throughout the Pilbara are FIFO workers, forecasted to reach 43k by 2020. These worker numbers inflate overnight domestic visitation and account for the higher spend patterns as well. Based on MCA research conducted by PWC in 2012 on Pilbara employment.

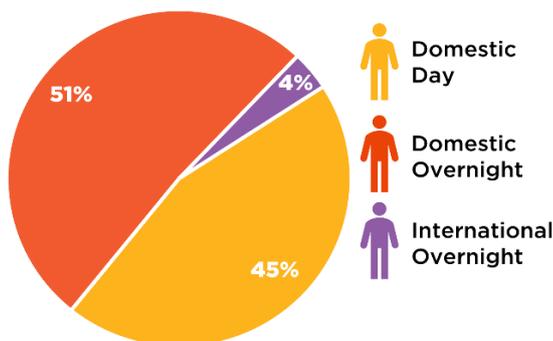
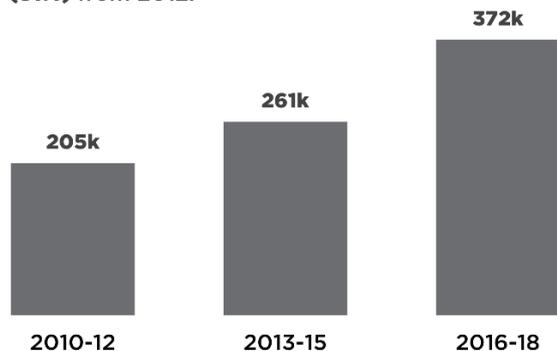
This DMP deliberately focuses on initiatives to increase overnight visitation to Karratha and to grow the average length of stay as these will deliver far higher economic benefits (including local jobs and investment) than focusing on initiatives to drive the day tripper market.

Figure 1: Karratha's visitor economy<sup>3</sup>

# KARRATHA'S VISITOR ECONOMY

## VISITOR NUMBERS & TYPE

In 2018, Karratha received 372k visitors, up **167k (81%)** from 2012.



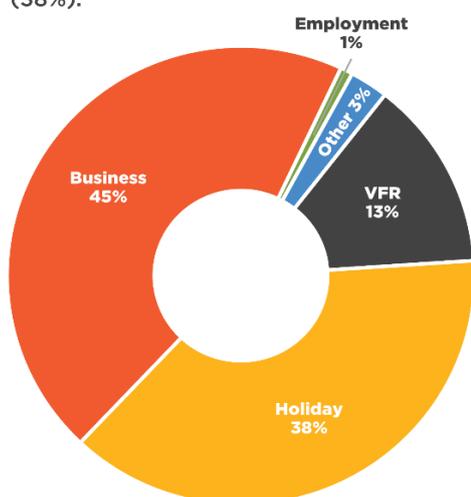
The majority of visitors are **domestic overnight visitors**, representing **51%** of all visitation. (based on three year average from 2016-18)

## VISITOR SPEND



## WHY VISITORS COME & HOW MANY JOBS ARE GENERATED

The majority of visitation to Karratha is business travel comprising **45%** of visitation, followed by holiday visitation (38%).

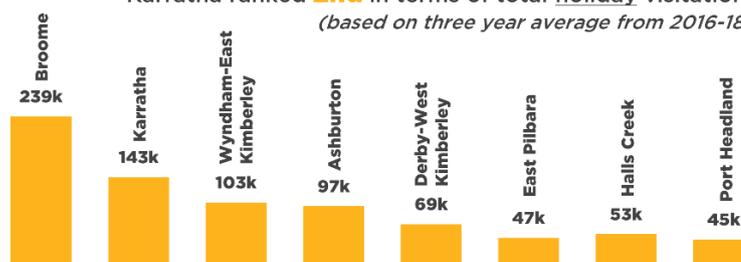


In 2016, the visitor economy generated **802** jobs (83% of which were full time) and produced **\$156m** in economic output.



## COMPARISON WITH OTHER LGAs

Out of the eight LGAs assessed in Australia's North West region, Karratha ranked **2nd** in terms of total holiday visitation. (based on three year average from 2016-18)



<sup>3</sup> Based on three-year averages over the period 2010-2018 (March YE data). International Visitor Survey and National Visitor Survey, Tourism Research Australia. 2015/16 is the most recent data provided through Economy ID - <https://economy.id.com.au/karratha/tourism-value?Tourismtype=3&EndYear=2011> for employment and related economic data.

## 1.4. The destination mission statement

To guide the continued development of Karratha as a destination and to strengthen the visitor economy, it is important that a destination mission statement is created which industry and all stakeholders buy into and support. The destination mission statement proposed is outlined in Figure 2 below, along with four activation areas which support the implementation of the mission. The opportunities outlined in Section 6 are categorised under these four activation areas and reflect the activations required.

From this mission statement and activation areas, Council and stakeholders should work to define an aspirational destination vision to work towards.

Figure 2: The DMP mission and activation themes

### OUR DESTINATION MISSION STATEMENT

By 2030, Karratha will aim to double current visitor spend and aim to be in the top ten places to visit in Western Australia. This will be achieved through growing overnight visitation, introducing a stronger destination event program and actively encouraging tourism investment into new products and experiences.

### ACTIVATION AREAS

#1



#### Working better together

Ensuring there is greater collaboration between Council and industry. This is an important first step to developing a strong and sustainable visitor economy.

#2



#### Growing demand through development & investment

While Karratha's natural beauty and assets are of high quality, to grow Karratha's visitor economy requires introducing new and unique things for visitors to do which leverage off these assets and which generate commissionable product.

#3



#### Diversifying and growing destination events

Although community events are important, to raise the profile of Karratha as a destination there is a need to introduce 1-2 signature Karratha destination events.

#4



#### Promoting Karratha as a vibrant destination

Improving the positioning and awareness of Karratha through improved branding and destination visitor information which is now underway. And ensuring that a united and collective marketing messaging approach is followed.

Whilst there are many areas requiring attention to sustainably grow the visitor economy, the above four activation areas are seen as the key areas to focus on as a priority. They are seen as "catalyst" areas of activation, which will lead to supporting other areas as identified in the implementation plan at the back of this report. They are also focussed on, noting the challenge which Council and industry have had in getting a number of tourism initiatives developed and implemented, despite best efforts.

Activating tourism on a staged basis, is therefore seen as crucial to expanding the visitor economy on a sustainable basis. There is greater risk in trying to take on too much and spreading time and resources too thinly across many areas of the visitor economy.

## 1.5. Barriers to growth

Figure 3 provides a summary of the challenges which were identified through the research and analysis. These will impact Karratha’s ability to sustainably grow its visitor economy if not adequately addressed. The barriers have not been included as a criticism – many other destinations nation-wide have the same challenges – however, to mitigate or resolve these, first requires the acknowledgment of them.

Importantly, to resolve or mitigate these barriers/challenges requires a collaborative approach between Council and industry. Many of the opportunities included in this DMP have been identified as potential solutions to these barriers.

Figure 3: Barriers to growth



## 1.6. Recommended activations

To activate Karratha's destination mission will require support for a number of opportunities. These have been developed through input and ideas received from numerous stakeholders during the consultation for this DMP. Their ideas and suggestions have been evaluated and crystallised in light of the various barriers identified for Karratha. Figure 4 provides a summary of the recommended activations identified.

It is important to note that these are provided as examples of potential opportunities for Karratha to stimulate ideas and discussion. They are not a definitive list of all the opportunities available. By way of example, an outdoor higher quality night time dining experience could be a "Dinner on the Rocks" experience, as but one possible example of new, higher-quality and unique dining experiences which could be considered for Karratha and is provided merely to demonstrate the types of experiences which should be investigated.

Figure 4: Summary of recommended activations

### ACTIVATIONS



#### Working better together

- Ensure tourism industry operators are represented on the TAG
- Industry networking and information sessions
- Industry training and upskilling
- Encouraging greater collaboration by Council with key state government agencies who are major land managers/owners such as the Department of Biodiversity, Conservation and Attractions (DBCA)
- Council working closely with major resource sector companies who are major landowners to encourage greater access to land for tourism development opportunities



#### Growing demand through development & investment

- Branded, higher-quality hotel
- Council incentivisation to encourage private investment
- Dampier Marina as a hub for water-based recreation
- Offering a higher-end outdoor dining option without the need for built infrastructure
- Higher-Quality Destination Holiday Park
- Investment memorandum and facilitation of investment forums to raise awareness
- Island glamping facility, small-scale, low impact
- Karratha Airport as a light aircraft, gliding and paragliding recreation hub
- Murujuga Living Knowledge Centre suggested concept enhancements
- Cossack cultural accommodation facility
- Explorer cruise ship visits at Port of Dampier

#3



### Diversifying and growing destination events

- Events to leverage natural assets such as a Big Red Fishing Competition
- Event toolkit
- Evening Light Show leveraging off and showcasing Karratha's natural environment
- Major Destination Sporting Event
- Red Earth Arts Precinct National Exhibition & Event Program

#4



### Promoting Karratha as a vibrant destination

- Assessment of visitor information services (and relocation of the VC to a town centre location)
- ATDW audit and listing
- Local awareness and tourism ambassador program
- Product packaging
- Karratha gateway highway signage

## 1.7. The first steps

Each of the 24 recommended activations provided in this DMP are important for assisting Karratha to diversify its economic base. However, because Karratha is at a relatively embryonic stage of tourism, there is a need to focus in on a small number of foundational projects to “get the ball rolling” and to ensure that larger projects are being driven from a united sector via a carefully planned approach. Table 1, outlines the recommended projects which should be activated first (i.e. in the short-term), followed by those which may take longer to be activated. The short-term activations are considered “low hanging fruit opportunities” and the “must do” building blocks to help support other projects.

Table 1: Project activation priorities

#### Priority 1

- Ensure tourism industry operators are represented on the TAG
- Industry networking and information sessions
- Industry training and upskilling
- Council incentivisation to encourage private investment
- Investment memorandum and facilitation of investment forums
- Event toolkit
- ATDW audit and listing
- Nature-based camping
- Night time outdoor dining experience
- Assessment of visitor information services
- Product packaging
- Red Earth Arts Precinct national exhibition & event program
- Local awareness and ambassador program
- Events to leverage natural assets such as a Big Red Fishing Competition

#### Priority 2

- Light show leveraging off and showcasing Karratha's natural environment
- Major Destination Sports Event (triathlon or similar)
- Branded, higher-quality hotel property

- Higher-quality destination holiday park
- Island glamping facility
- Murujuga Living Knowledge Centre Enhancements
- Karratha gateway highway signage

### Priority 3

- Dampier Marina as a hub for water-based recreation
- Karratha Airport as a light aircraft recreation hub
- Explorer cruise ship visits at Port of Dampier
- Cossack cultural accommodation facility

## 1.8. Summary

Despite having a unique natural environment and significant Aboriginal cultural history along with early colonial history, Karratha is perceived primarily as a mining destination. Karratha's visitor economy is still at a relatively early stage of development, contributing to just over 5% of jobs and 1.4% of economic output in Karratha.<sup>4</sup>

Although the mining sector (which currently comprises 63% of all output in Karratha<sup>5</sup>) is likely to remain a key industry for Karratha for the foreseeable future, there is a strong desire to position Karratha as “more than just a mining town”. The visitor economy presents a solid opportunity for Karratha to diversify its economic base and, at the same time, make Karratha a more enjoyable place to live and work for its residents. The visitor economy cuts across many industry sectors, and, therefore, growing the visitor economy, has strong flow on effects to various other industries such as manufacturing, transport, retail, food and beverage, education and recreation.

However, to achieve this in an increasingly competitive landscape will require a united effort. A piecemeal approach will not achieve the level of change required to truly elevate the potential of Karratha's visitor economy. New, higher yielding visitor markets need to be encouraged to visit Karratha, and to do this will require significant investment and reinvestment into tourism-related infrastructure and product. Karratha needs to shift from primarily offering free things to do, to a destination with an improved balance of commissionable (paid) tourism product along with quality recreational amenities.

It must be remembered that while Karratha does have a high-quality natural environment, so do many other destinations throughout WA and Australia. The tourism sector is highly competitive, and it is how these destinations have leveraged off these natural assets which help them stand out.

A digital-only solution (i.e. branding and a new website) will fail to have the necessary impact. Rather, the visitor economy needs to be looked at holistically, including new product development, infrastructure, events, governance, marketing and tourism services. This can only work if government and industry agree to partner together to drive the changes required. The tourism sector is highly entrepreneurial, which relies heavily on mostly private sector interests taking commercial risks to activate and maintain products to a highly marketable standard.

Council's role is to strongly support new product development options (as identified within this DMP) by actively facilitating the implementation of new product along with enhanced existing product. Sometimes, Council may even need to be an initial short-term investor, to help activate opportunities and lower project commercial risk.

This DMP has deliberately taken a highly focussed approach when identifying opportunities, rather than creating a wish list of things that would be “nice to have” but which may struggle to get activated. With its high-quality natural

<sup>4</sup> <https://economy.id.com.au/karratha/tourism-value>

<sup>5</sup> <https://economy.id.com.au/karratha/output-by-industry>

environment, significant Aboriginal culture and an active and youthful community, there is a real opportunity, through a coordinated and focused approach, to grow Karratha's visitor economy on a sustainable basis.



## 2. Context & Research

### 2.1. About the DMP

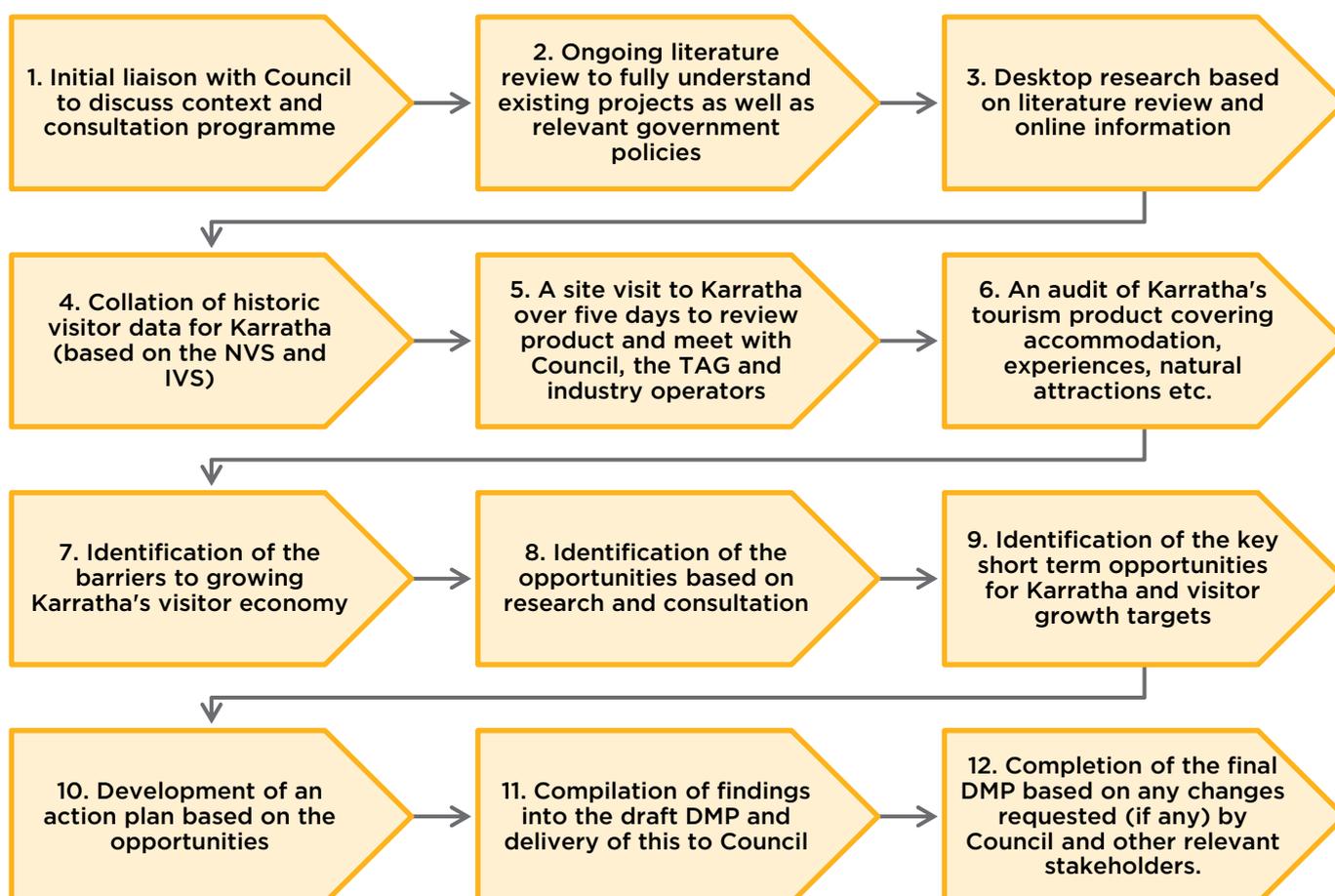
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This is a plan for the whole tourism industry, from solo operators right through to major businesses, associations and all levels of government. It takes the broadest possible scope, recognising many types of businesses are part of the visitor economy.

### 2.2. Our approach for completing this DMP

The methodology for developing the DMP is outlined in Figure 5 below.

Figure 5: DMP methodology



## 2.3. Definitions

For clarity, the following provides an explanation of the terms: visitor, the visitor economy and a DMP.



### WHO IS A VISITOR?

For the purpose of this DMP, a visitor includes all those travelling to Karratha, either for a day trip or staying overnight, for a variety of reasons, including for: leisure/holiday purposes; events (including sports, cultural and arts events and conferences); business-based travel; to visit friends and relatives (VFR); educational purposes; employment purposes; and for medical and health purposes.



### WHAT IS THE VISITOR ECONOMY?

The visitor economy recognises that visitor activity does not happen in isolation, but rather, contributes to investment in jobs across a broad range of industry sectors and to the provision of goods and services across many industries. This includes all industries that directly and indirectly serve visitors, ranging from accommodation, tourism operators and attractions, to broader goods and services such as retail and food and beverage industries.

As tourism is not a defined industry sector on its own, but rather the amalgamation of a variety of industry sectors including accommodation, food and beverage etc., the full extent of what comprises the visitor economy and its reach across many elements of the broader economy is often not fully understood or correctly quantified.



### WHAT IS A DMP?

Destination management is about the careful and sustainable management of the visitor economy. Unlike traditional tourism strategies which tend to be focused on marketing and promotion, a destination management plan is much broader and focuses on product development, planning requirements, industry development, infrastructure, human capacity and marketing.

Destination management is, therefore, far more comprehensive than destination marketing. Because of this, destination management does not happen in isolation; it involves a wide range of sectors, stakeholder groups and delivery partners — such as government agencies (local, state and federal), communities and business groups — working collaboratively.

Successful DMPs are well focussed on initiatives which can be more easily implemented, and which are highly strategic in nature. They avoid the common mistakes of:

- offering up a wish list of ideas rather than being tightly focussed around specific initiatives;
- failing to illustrate what is viable and why;
- offering the need for more strategies and plans rather than tangible projects; and
- failing to acknowledge the need for a well skilled and sufficiently large workforce, to actually deliver the visitor economy outcomes needed.

## 2.4. About Karratha

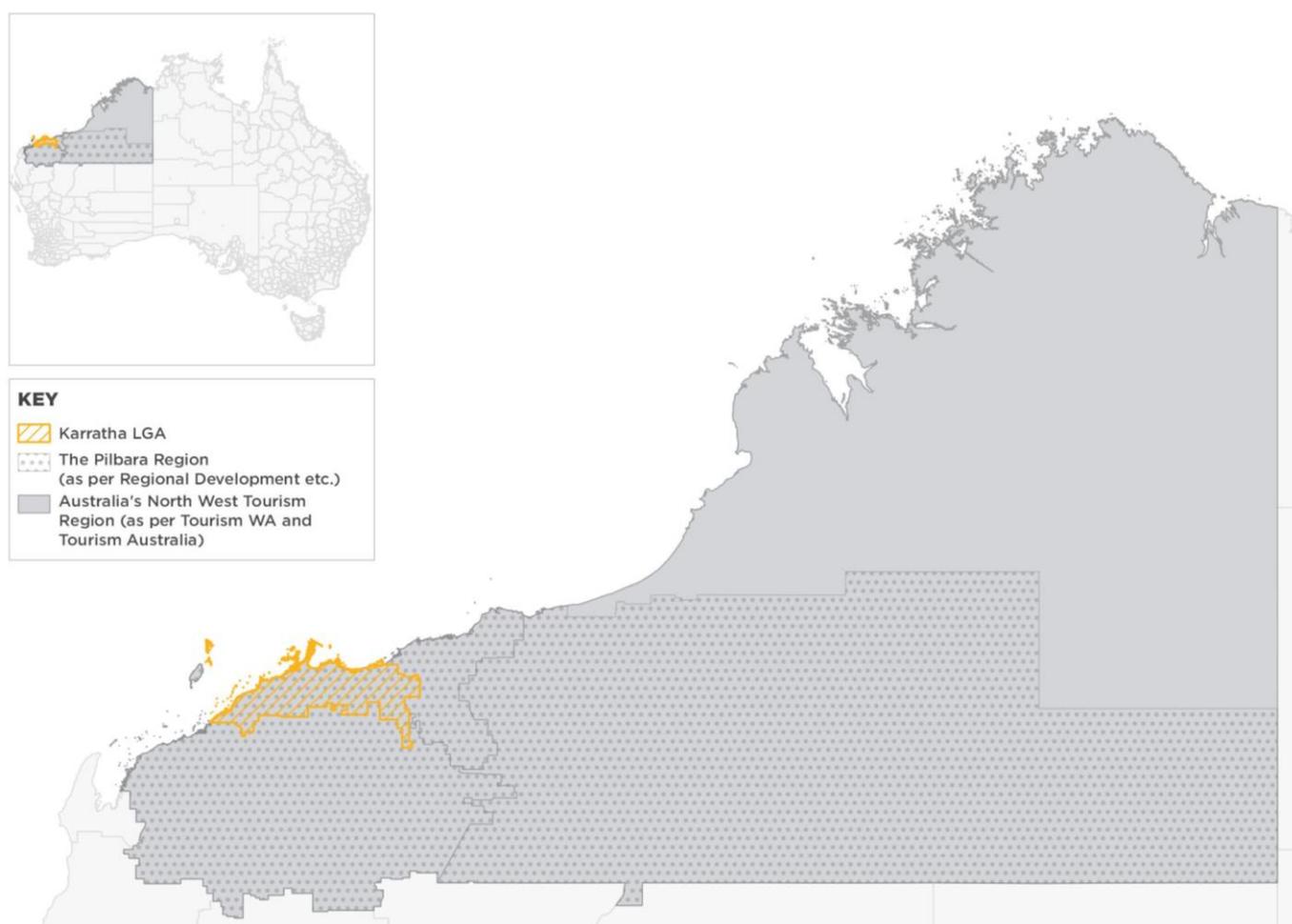
### 2.4.1. Location

The City of Karratha is a Local Government Area (LGA) situated on the north-west coast of Western Australia (WA). The LGA covers 15,800 square kilometres and is bordered by Ashburton LGA in the south, Port Hedland LGA in the east and the Indian Ocean in the west. It is a relatively young city, established in the 1960s as a result of the significant growth of the iron ore industry.

Figure 6 provides an overview of the LGA and where it sits within Australia's tourism planning regions (as defined by Tourism WA and Tourism Australia) as well as the Pilbara Region (as per the Department of Primary Industries and Regional Development and Pilbara Regional Council).

Karratha is accessed via air and road. Karratha Airport - which is the second busiest airport in WA<sup>6</sup> - is serviced by Qantas and Virgin who operate multiple flights each day between Perth and Karratha. Via car, Karratha is an 8.5-hour drive ex Broome and a 16-hour drive ex Perth via the North West Coastal Highway.

Figure 6: Map of Karratha



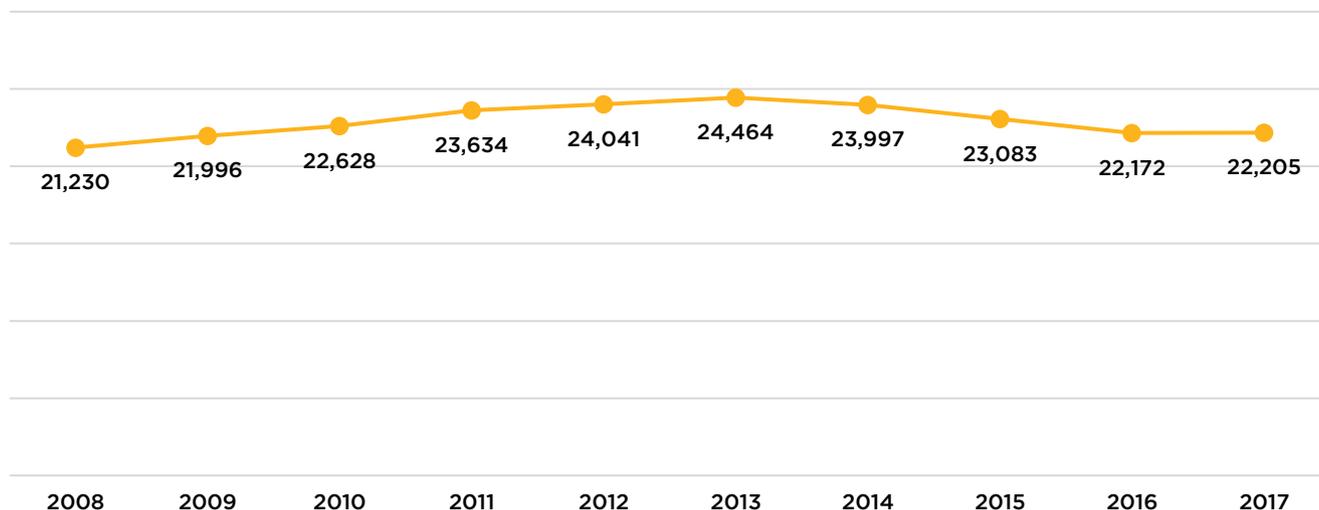
<sup>6</sup> Airport Traffic Data 1985-86 to 2014-15, Bureau of Infrastructure, Transport and Regional Economics (BITRE).

## 2.4.2. Demographics

### 2.4.2.1. Population growth

Over the last 10 years, Karratha’s population has fluctuated from a low of 21,230 residents in 2008 to a peak of 24,464 residents in 2013. The decline in population post the 2013 high was driven by falling resources prices and the end of the construction phase of Australia’s biggest resource project<sup>7</sup> (the \$27b North West Shelf Project<sup>8</sup>).

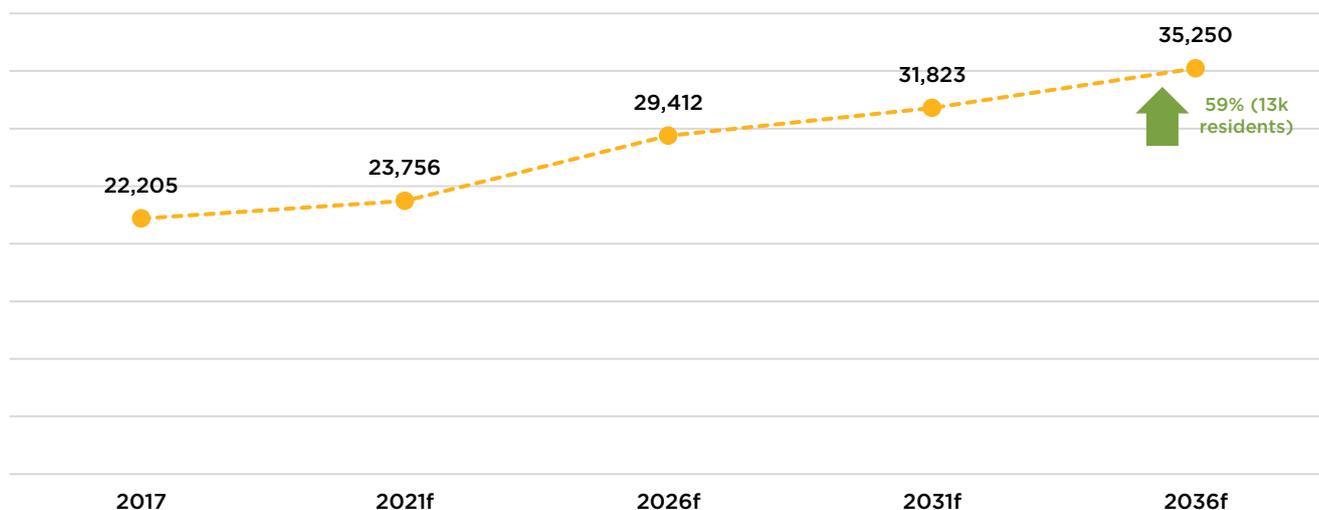
Figure 7: Karratha’s historic population (2008-2017)<sup>9</sup>



### 2.4.2.2. Population forecasts

Over the next 20 years, Karratha’s population is forecast to increase by 59% (13k residents), growing from 22,205 residents to an estimated 35,250 residents. This population growth is an important factor to consider in destination management planning because tourism-related product and infrastructure does not only service visitors but rather caters to a local market, providing residents with things to do in their spare time and creating an environment where skilled and talented workers will want to live and play.

Figure 8: Karratha’s population forecasts (2017 - 2036)<sup>10</sup>



<sup>7</sup> <https://www.theaustralian.com.au/business/mining-energy/pilbara-towns-back-on-track-as-in-days-of-ore/news-story/fe6492960c145cfc1e152fb41e9cb39>

<sup>8</sup> <https://www.theaustralian.com.au/business/in-depth/the-nations-top-shelf/story-fngf4f2d-1226522194731?sv=76c9cb6280653b90c19afdb0a0e142dd>

<sup>9</sup> <https://profile.id.com.au/Karratha/population-estimate>

<sup>10</sup> <https://forecast.id.com.au/Karratha/population-households-dwellings>

### 2.4.2.3. Age of Residents

The age of an area's resident population is an important factor to consider in destination management planning because the local market plays an important role in enjoying and supporting tourism-related product and infrastructure. Karratha has a young population profile, with more than one quarter (28%) of its population being below the age of 17 (and younger than the WA average of 23%). The opportunities identified within this DMP consider this young profile and identifies product which would appeal to this family-oriented market.

**Table 2: Age of Karratha residents (2011 & 2016)<sup>11</sup>**

Service age group (years)	2011			2016			Change 2011 - 2016	
	Karratha	Karratha %	WA %	Number	Karratha %	WA %	#	%
Babies and pre-schoolers (0 to 4)	1,831	8%	7%	2,037	10%	7%	206	11%
Primary schoolers (5 to 11)	2,135	9%	9%	2,537	12%	9%	402	19%
Secondary schoolers (12 to 17)	1,417	6%	8%	1,488	7%	7%	71	5%
Tertiary education and independence (18 to 24)	2,159	9%	10%	1,670	8%	9%	-489	-23%
Young workforce (25 to 34)	4,888	21%	15%	4,590	21%	15%	-298	-6%
Parents and homebuilders (35 to 49)	6,523	29%	22%	5,629	26%	21%	-894	-14%
Older workers and pre-retirees (50 to 59)	2,828	12%	13%	2,366	11%	13%	-462	-16%
Empty nesters and retirees (60 to 69)	924	4%	9%	940	4%	10%	16	2%
Seniors (70 to 84)	178	1%	7%	200	1%	8%	22	12%
Elderly aged (85 and over)	17	0%	2%	22	0%	2%	5	29%

### 2.4.3. Economy

Karratha's economy is largely focused on mining and construction, together comprising 77% of total output in 2016/17 (Table 3). The decline in construction activity over the 10-year period indicated (falling from 35% of total output to 14%) is largely attributed to the shift from the construction phase to operation phase of major mining projects. The use of technology and further ongoing advancements in driverless trains, trucks and other mechanised equipment is likely to continue to reflect modest actual mining job growth, though supporting technical positions are expected to grow as new resource sector projects are activated.

The desire to diversify the area's economy is one which is shared at a local, regional and state level. Tourism is considered a sector with significant opportunity to assist in achieving this diversification because of the opportunity it also can offer to support a higher level of local lifestyle and amenity value.

**Table 3: Karratha, output by industry (2007/18 - 2016/17)<sup>12</sup>**

Industry	2007/08			2016/17			Change	
	Output	%	WA %	Output	%	WA %	#	%
Mining	\$7.17b	49%	15%	\$6.55b	63%	22%	-\$621.1m	-9%
Construction	\$5.10b	35%	19%	\$1.45b	14%	15%	-\$3.64b	-71%
Transport, Postal and Warehousing	\$428.1m	3%	5%	\$397.7m	4%	5%	-\$30.4m	-7%
Manufacturing	\$407.0m	3%	14%	\$502.8m	5%	10%	\$95.8m	24%
Rental, Hiring and Real Estate Services	\$296.7m	2%	8%	\$332.1m	3%	8%	\$35.4m	12%
Electricity, Gas, Water and Waste Services	\$207.2m	1.4%	3%	\$142.6m	1%	2%	-\$64.6m	-31%
Public Administration and Safety	\$153.9m	1.0%	4%	\$182.9m	2%	4%	\$29.0m	19%
Administrative and Support Services	\$137.1m	0.9%	3%	\$137.3m	1.3%	2%	\$200k	0.1%
Professional, Scientific and Technical Services	\$128.2m	0.9%	6%	\$110.2m	1.1%	5%	-\$18.0m	-14%
Accommodation and Food Services	\$116.2m	0.8%	2%	\$100.2m	1.0%	2%	-\$16.0m	-14%
Wholesale Trade	\$99.1m	0.7%	4%	\$120.0m	1.1%	3%	\$20.9m	21%
Education and Training	\$95.3m	0.7%	3%	\$86.0m	0.8%	3%	-\$9.3m	-10%
Retail Trade	\$85.4m	0.6%	3%	\$74.5m	0.7%	3%	-\$10.9m	-13%
Other Services	\$77.2m	0.5%	2%	\$79.6m	0.8%	2%	\$2.4m	3%
Health Care and Social Assistance	\$50.1m	0.3%	3%	\$93.6m	0.9%	4%	\$43.5m	87%
Financial and Insurance Services	\$49.4m	0.3%	3%	\$40.9m	0.4%	4%	-\$8.5m	-17%
Information Media and Telecommunications	\$28.2m	0.2%	1%	\$21.2m	0.2%	1%	-\$7.0m	-25%
Agriculture, Forestry and Fishing	\$17.3m	0.1%	3%	\$20.4m	0.2%	3%	\$3.1m	18%
Arts and Recreation Services	\$12.5m	0.1%	1%	\$14.8m	0.1%	1%	\$2.3m	18%
<b>Total Industries</b>	<b>\$14.7b</b>	<b>100%</b>	<b>100%</b>	<b>\$10.5b</b>	<b>100%</b>	<b>100%</b>	<b>-\$4.20b</b>	<b>-29%</b>

<sup>11</sup> <https://profile.id.com.au/karratha/service-age-groups?BMID=40>

<sup>12</sup> <https://economy.id.com.au/karratha/output-by-industry?sEndYear=2008>

## 2.5. About the Pilbara region

The Pilbara region, as per the Regional Development Commissions Act, is made up of four LGAs, including Ashburton, East Pilbara, Karratha and Port Hedland. Over the last 10-15 years, the region has developed as an economic powerhouse of WA, driven by global demand for iron ore and natural gas. The WA State Government has a desire to continue to leverage this growth and develop the Pilbara into a “vibrant, diverse and resilient communities supporting a resident population of 140,000 by 2035”<sup>13</sup>.

Between 2014 and 2017, Tourism Western Australia (Tourism WA) commissioned a market research project with domestic residents to assist in understanding the appeal of five major destinations in WA.<sup>14</sup> The research found that: *“The Pilbara is seen more as a centre of industry (mining) than as a true tourism destination. While some potential visitors are attracted by the natural beauty and solitude offered by the region, in reality, there is only a select group to whom the current offering appeals. For many, the Pilbara will only ever be visited as part of a larger trip in WA.”*<sup>15</sup>

Other key findings of the research include the following.

- Despite awareness of the Pilbara as a mining region, awareness about the region as a tourism destination is limited. Out of seven destinations,<sup>16</sup> respondents were asked to rank in terms of destination awareness, the Pilbara ranked second to last (with Margaret River, Perth and Albany topping the rankings).
- Key triggers for visiting the Pilbara include visiting for a work trip, as part of a larger trip or to visit friends and relatives.
- Barriers to visitation identified were: time/distance; cost/value; negative associations; and difficulty.
- Strengths of the Pilbara include wildlife, outback towns and aboriginal culture.

## 2.6. Major national tourism trends

### 2.6.1. Domestic Insights

The domestic travel sector in Australia continues to grow. As of March 2018, Australians:

- undertook 97.8m domestic overnight trips (up 7% from 2017) and spent \$65.1b (up 5%) on these trips<sup>17</sup>; and
- undertook 195.4m domestic day trips (up 5% from 2017) and spent \$20.8b (up 6%) on these trips<sup>18</sup>.

Understanding domestic tourism trends is important as it can ensure that Karratha is proactively researching what is driving these increases and what visitors are demanding. Product development and marketing activity need to be aligned with this.

Some major trends identified by TRA and State tourism bodies include the following.<sup>19</sup>

- The need for travel to provide opportunities to relax, reconnect and rejuvenate, and that short breaks, events and festivals are cornerstone components and drivers for travel.
- There is often too much choice and the proliferation of online information makes decisions difficult for consumers. The planning process needs to be made simpler. Package deals have strong appeal (especially to a time-poor consumer) and are motivating as they create a call to action and offer a sense of urgency to book.

<sup>13</sup> Pilbara Regional Blueprint: Stage 1, Government of Western Australia Pilbara Development Commission, page 5.

<sup>14</sup> <https://www.tourism.wa.gov.au/Research-Reports/Specialised-Research-Reports/Pages/Destination-perceptions-research.aspx#/>

<sup>15</sup> <https://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/Destination%20Perceptions%20Research%20Series%20Summary%20-%20PILBARA.pdf>

<sup>16</sup> Including (in order of results): Margaret River, Perth, Albany, Ningaloo, Broome & the Kimberley, Pilbara and Golden Outback.

<sup>17</sup> Travel by Australians, Year Ending March 2018, Tourism Research Australia

<sup>18</sup> Ibid

<sup>19</sup> <https://www.tra.gov.au/Research/Domestic-tourism-by-Australians/National-Visitor-Survey-results>

[https://tourism.act.gov.au/wp-content/uploads/2017/05/Marketing\\_Strategy\\_15-20.pdf](https://tourism.act.gov.au/wp-content/uploads/2017/05/Marketing_Strategy_15-20.pdf)

<https://www.tourism.wa.gov.au/Research-Reports/Facts-Profiles/Pages/Overnight-Daytrip-Profiles.aspx#/>

- Technology is both a friend and an enemy. Australians are prolific users of technology but are also looking to take a step back from technology. There is a strong desire to reconnect through disconnecting; going back to basics and taking a holiday from the online world.
- Australians are increasingly time poor. Holiday time is precious, and reconnection remains central to travel. Taking time out to be with family and friends allows you to connect, recharge, escape and enjoy the small things in life.
- Creating a reason or occasion to travel provides an opportunity for domestic travel to grow, particularly when holidaying overseas is now more affordable.
- Customer service remains a grumbling point and competitive destinations build their offer around this.
- Food and wine experiences, as well as events and festivals, generate a lot of excitement and interest and can provide a reason to travel, however, they need to be authentic experiences.
- Food and wine experiences must showcase local products, promote food and dining as an experience in itself, leverage other key experiences (including events) and offer an element of interactivity.
- Logistics are important for event and festival attendees, including transport, being able to book online, value for money and ticketing options.
- The appeal of events and festivals can be maximised by providing tourist information on the event website, linking to a charitable cause, having an easy online booking process, partnering with media to help raise awareness, and ensuring the event reflects Australia's lifestyle, environment, or a particular community.
- There is an increased expectation with regards to authenticity and engagement. The quest for a deeper connection to a place and its people continues to be a strengthening travel goal. More visitors are looking for ways to have a local, connected experience.
- Although Australians are choosing to travel overseas, Western Australians are also continuing to travel within the state in increasing numbers, which is being driven by the holiday/leisure, visiting friends and relatives and business segments.<sup>20</sup>
- Destinations focusing on tourism development promote themselves through strong visual cues and images that represent and 'sell' authentic experiences. If done well, people start to associate places with how it makes them feel and what they can expect. By way of example, the Gold Coast = sun, surf and party lifestyle; New Zealand = adventure, scenery, food and wine.

## 2.6.2. International insights

According to the World Tourism Organisation (WTO), tourism is one of the fastest growing economic sectors in the world<sup>21</sup>. In 2017, the sector accounted for 6.6% of total global exports and almost 30% of total global service exports. This growth is also reflected in results from Australia's International Visitor Survey (IVS) for the year ending March 2018, with national figures showing an increase of 8% to 8.3m for international visitors for the year and spend increased 6% to \$42.3b.

Western Australia's top five largest international leisure source markets (in order of demand) include the UK, Malaysia, Singapore, the USA and NZ. China, while being the largest international source market to Australia<sup>22</sup>, ranks as WA's sixth largest leisure source market. These international markets are looking for:



Safety & Security



World-class natural beauty & wildlife



Value for money



Family friendly & friendly locals



Clean city



Good food, local cuisine and produce

<sup>20</sup> [https://www.armadale.wa.gov.au/sites/default/files/assets/documents/council/Tourism\\_Destination\\_Strategy\\_2015\\_-\\_2019.pdf](https://www.armadale.wa.gov.au/sites/default/files/assets/documents/council/Tourism_Destination_Strategy_2015_-_2019.pdf)

<sup>21</sup> <https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2017/world2017.pdf>

<sup>22</sup> <https://www.tra.gov.au/Research/International-visitors-to-Australia/International-Visitor-Survey-results/ivs-march-charts>

For Karratha, the international market currently makes up 4% of visitation. The largest leisure-based markets (holiday and VFR visitation as of March 2018) include NZ followed by Germany, the UK, the USA, France and Singapore.<sup>23</sup>

Visitor perceptions are influenced by their knowledge of the destination, the distance they need to travel to the destination, media coverage, advertising, their available holiday time and whether it is a first or repeat visit. For example, in short-haul markets, such as NZ, Australia is a highly achievable destination. These visitors often travel to Australia more than once and purchase shorter, more frequent trips. With familiarity comes the confidence to plan their own trip, travel to destinations beyond the gateways or travel in a less structured, more independent style.

In long-haul travel markets, such as the United States and Europe, Australia is seen as a destination that requires a large commitment of both time and money. There is much greater pressure on first-time visitors to see as much as possible or to see the key 'icons'. In many instances, long-haul travellers believe Australia is the 'trip of a lifetime' and see it as a single visit destination.<sup>24</sup>

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<sup>23</sup> International Visitor Survey, Tourism Research Australia

<sup>24</sup> <https://www.tra.gov.au/Research/Domestic-tourism-by-Australians/National-Visitor-Survey-results>  
[https://tourism.act.gov.au/wp-content/uploads/2017/05/Marketing\\_Strategy\\_15-20.pdf](https://tourism.act.gov.au/wp-content/uploads/2017/05/Marketing_Strategy_15-20.pdf)  
<https://www.tourism.wa.gov.au/Research-Reports/Facts-Profiles/Pages/Overnight-Daytrip-Profiles.aspx#/>



# 3. Karratha's Visitor Economy

## 3.1. Visitation to Karratha

### 3.1.1. Methodology

Visitation data for Karratha has been gathered from the National and International Visitor Surveys (NVS and IVS), published by Tourism Research Australia (TRA). The NVS and IVS provide visitation data based on 'Statistical Area 2' (SA2) boundaries. Every LGA in Australia is made up of one or more SA2 areas. The SA2s included in Karratha are Karratha and Roebourne.

As per the methodology applied by TRA for LGAs<sup>25</sup>, data is averaged over three or four year periods, rather than being provided on an annual basis, as this minimises the impact of variability in estimates from year to year and provides more robust estimates. The periods assessed in this DMP include: March 2010 to March 2012; March 2013 to March 2015; and March 2016 to March 2018. March YE data (unless otherwise specified) is used as this is the most recent iteration of data released by TRA via the NVS and IVS. June YE data has not yet been released for 2018.

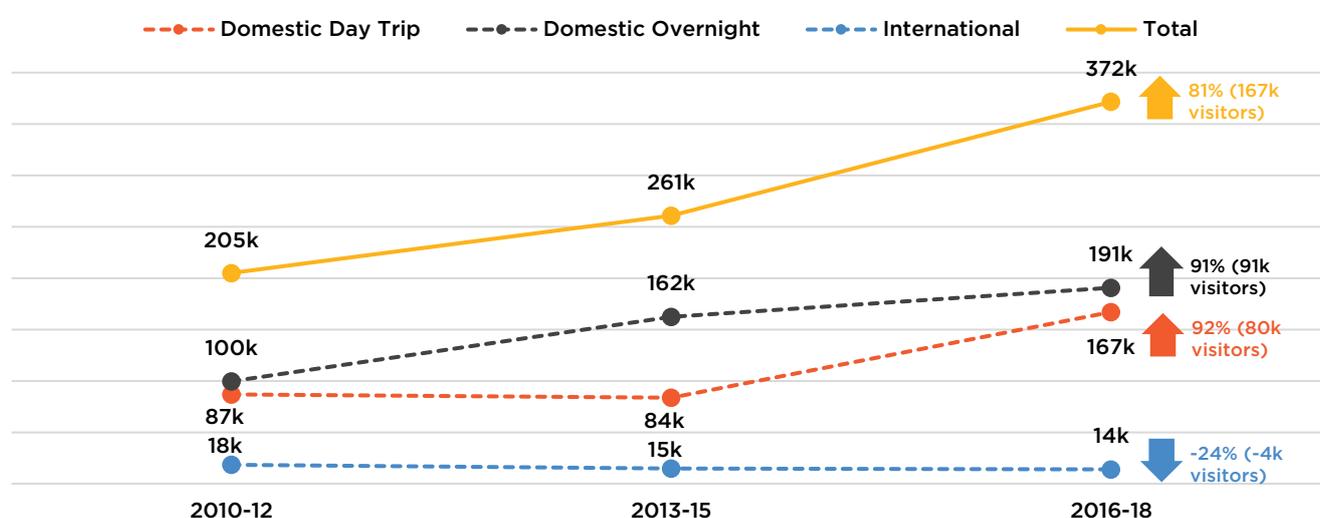
### 3.1.2. Total visitation to Karratha

Figure 9 demonstrates that, over the three-year period to March YE 2018, Karratha received 372k visitors. Just over half these were domestic overnight visitors (51%), followed by domestic day trippers (45%) and international visitors (4%).

Between 2012 and 2018, Karratha experienced strong growth in visitation, increasing by 81%, or, 167k visitors. This growth has been driven by the domestic market, rather than international, with domestic overnight visitation growing by 91k visitors (91%) and domestic day trip visitation increasing by 80k visitors (92%).

Over the same period, visitation by international visitors declined by -24% (-4k visitors). This is primarily attributed to a decline in international workers coming to Karratha for employment purposes (see Section 3.1.5) post-2013 upon completion of the North West Shelf Project).

Figure 9: Total Karratha visitation (2010-12 to 2016-18)<sup>26</sup>



<sup>25</sup> <https://www.tra.gov.au/research/regional-tourism/local-government-area-profiles/local-government-area-profiles>

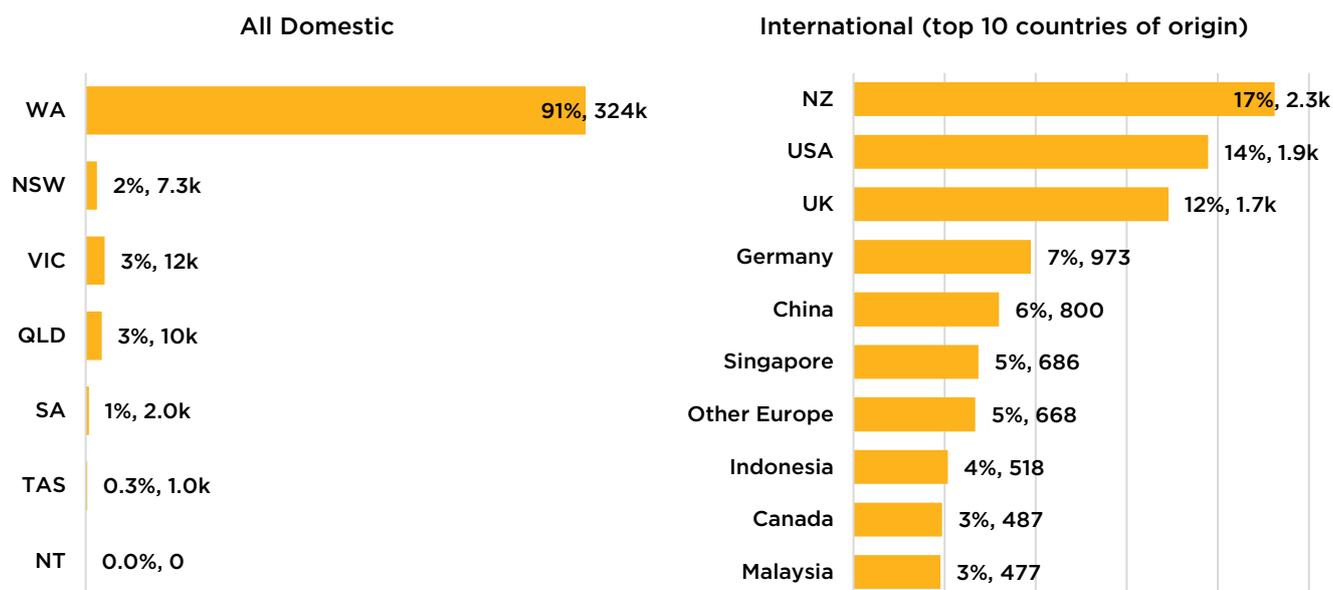
<sup>26</sup> Based on three-year averages over the period 2010-2018 (March YE data). International Visitor Survey and National Visitor Survey, Tourism Research Australia.

### 3.1.3. Where visitors are coming from

The vast majority of domestic visitors (overnight and day trip) to Karratha, come from Western Australia, making up 91% of visitation over the last three years. The top three countries of origin for international visitors are NZ (17%), USA (14%) and the UK (12%).

The size of the WA domestic market to Karratha is significant and raises the issue of what product and experiences are then needed, to attract stronger interstate visitation. We consider this very strong WA market is also heavily skewed by WA business travellers to Karratha along with those visiting friends and relatives.

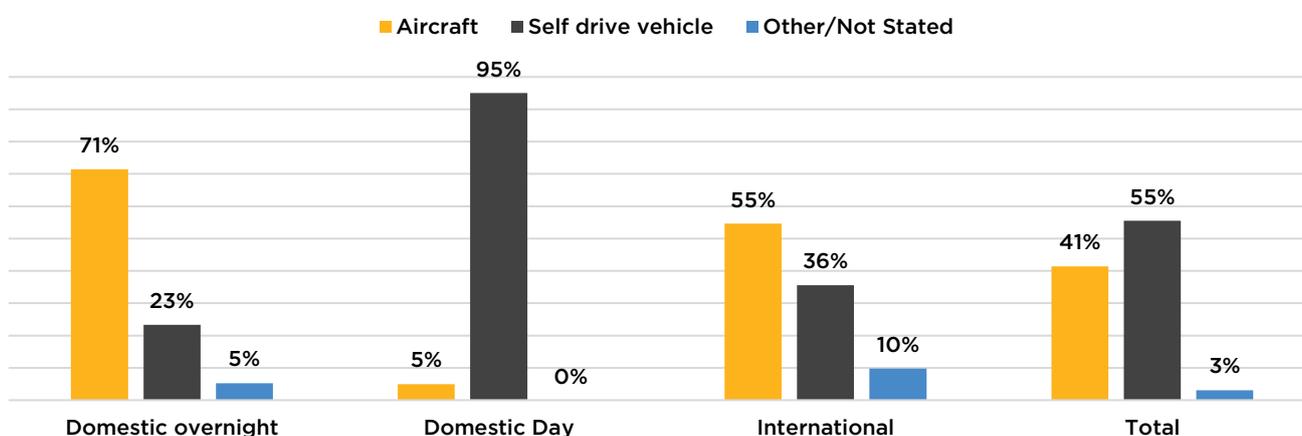
Figure 10: Place of origin (three-year average over period 2016-18)<sup>27</sup>



### 3.1.4. Mode of transport

Figure 11 summarises how visitors have travelled to Karratha, as an average over the last three years. It demonstrates that the majority of visitors travel to Karratha with their own vehicle, representing 55% of all visitors to Karratha. The self-drive market is, however, dominated by domestic day trippers. Domestic overnight and international visitors to Karratha more commonly travel by plane.

Figure 11: Mode of transport (three-year average over period 2016-18)<sup>28</sup>



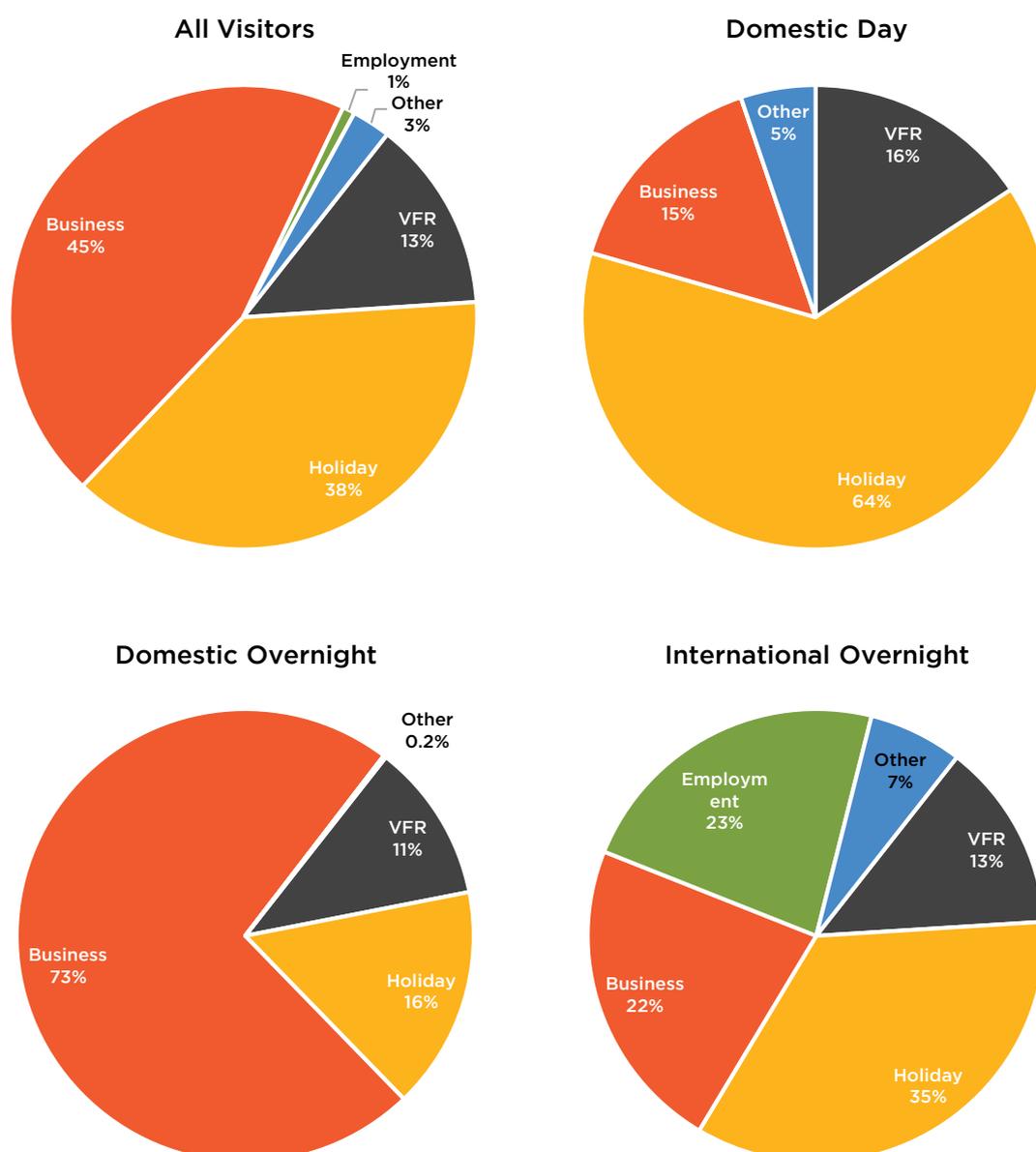
<sup>27</sup> International Visitor Survey and National Visitor Survey, Tourism Research Australia.  
<sup>28</sup> International Visitor Survey and National Visitor Survey, Tourism Research Australia.

### 3.1.5. Motivation for visitation

Figure 12 provides the purpose of visit, by visitor type, to Karratha for the three-year period to March 2018. This indicates that Karratha is currently positioned primarily as a business destination, with 45% of all visitors travelling to Karratha for this reason. This is particularly the case for the domestic overnight market, where business is by far the most dominant purpose of visit comprising 73% of all visitors. This is attributed to the strong mining and resource sector within Karratha and acknowledgement of it as a government hub for the Pilbara region.

While Karratha is fortunate to have the employment opportunities and economic growth which the mining and resource sector provides, this DMP has been commissioned based on the desire to diversify Karratha’s economy. Growing Karratha’s visitor economy presents an opportunity to achieve this, because it will not only increase the profile of Karratha as a holiday and leisure destination but will provide more things for Karratha’s community to enjoy, making Karratha a more desirable place to live, work and play.

Figure 12: Purpose of visit to Karratha (three-year average over period 2016-18)<sup>29,30</sup>



<sup>29</sup> International Visitor Survey and National Visitor Survey, Tourism Research Australia.

<sup>30</sup> The “other” category includes: Transit, Employment, Education, Medical reasons, Personal appointment/business (excl health), Providing transport, Attend Funeral and No other reason.

### 3.2. Comparison of visitation with surrounding LGAs

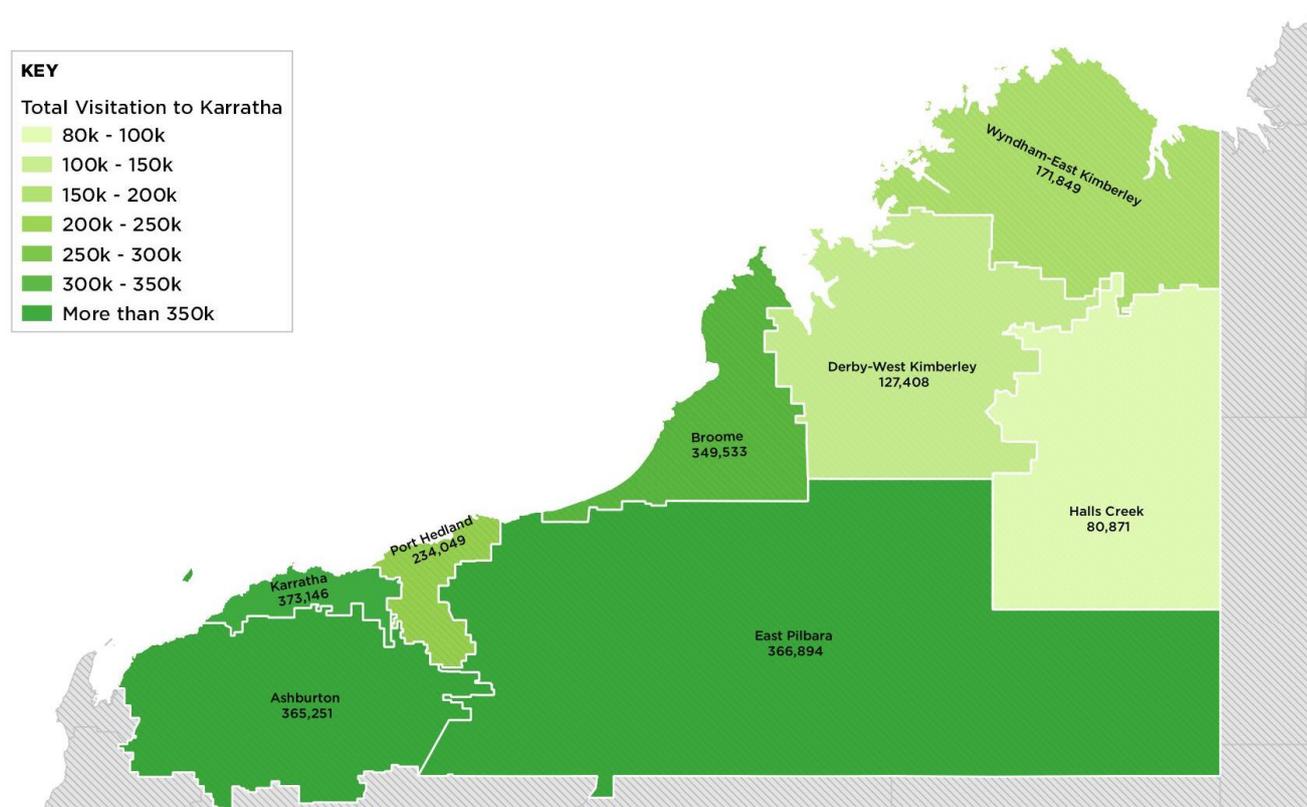
Figure 13 and Figure 14 provide a comparison of visitation to Karratha as well as seven other LGAs within Australia's North West region. The heatmapping demonstrates total visitation and holiday visitation based on a three-year average from 2016 to 2018 (March YE<sup>31</sup>).

The comparison demonstrates the following.

- Karratha ranks first out of the eight LGAs assessed in terms of total visitor numbers. This is followed by East Pilbara, Ashburton and Broome.
- While Broome is the most mature tourism destination out of those assessed, it ranks below Karratha, East Pilbara and Ashburton because of the strong FIFO and business markets which travel to these LGAs.
- When only holiday-based visitation is assessed, Broome ranks, by far, as the strongest destination, with 239k visitors. Karratha is the next strongest destination with just under 143k visitors.
- It is important to note that Karratha receives many visitors coming to work in the Pilbara, often referred to as fly in/fly out mining and resource sector workers, or FIFOs. By 2020 the mining and resource sector in the Pilbara is forecast<sup>32</sup> to reach 51.6k, of which 43k (83%) are forecast to be FIFOs.

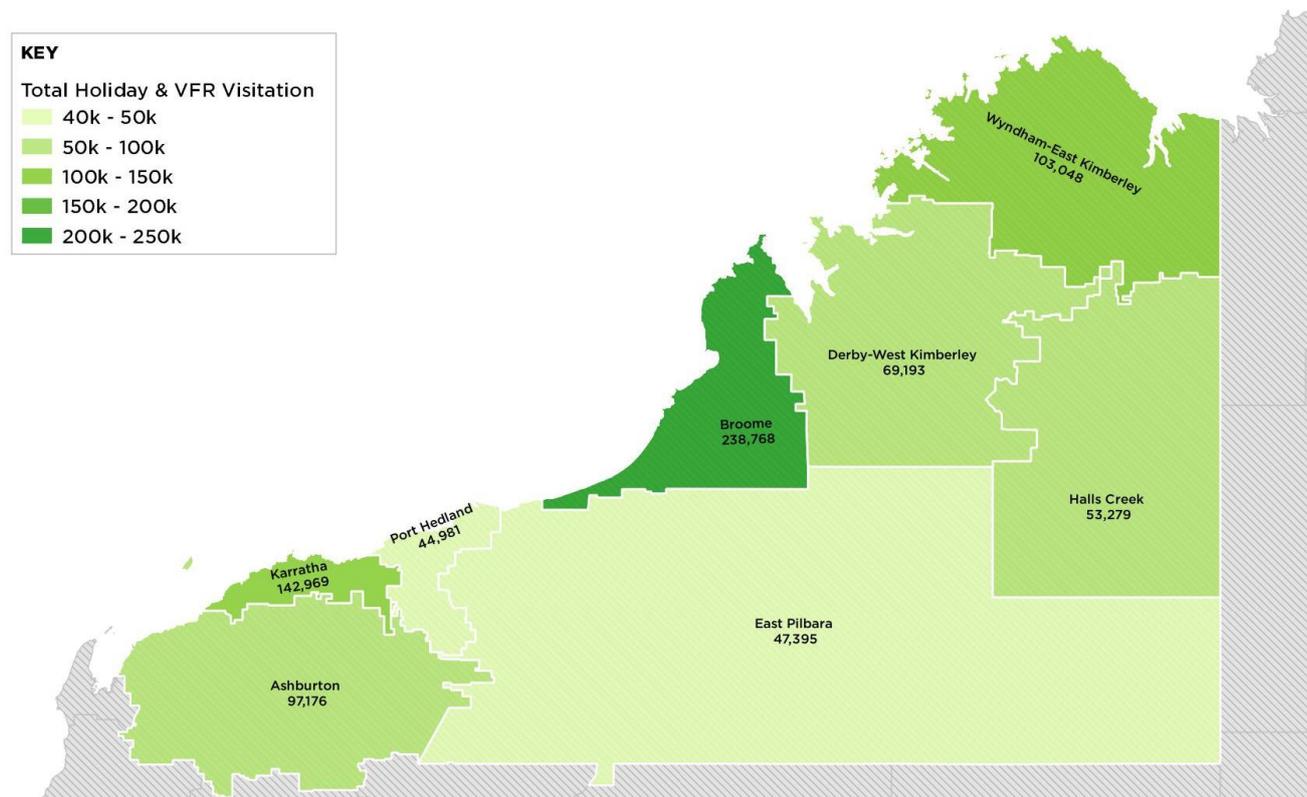
While the potential exists for Karratha to leverage off Broome's strong holiday visitation and well-known positioning as a leisure-based destination, this requires investment in Karratha's tourism product mix. Importantly, Karratha needs to look at capitalising on its unique points of difference (particularly comparing these to Broome) to ensure it is not merely duplicating what is on offer in Broome.

Figure 13: Visitation comparison - total visitation<sup>33</sup>



<sup>31</sup> March YE is used as this is the most current data available from the IVS and NVS.  
<sup>32</sup> Pilbara Population and Employment Study, prepared for CME by PWC, November 2012, page14  
<sup>33</sup> International Visitor Survey and National Visitor Survey, Tourism Research Australia.

Figure 14: Visitation comparison – holiday visitation<sup>34</sup>



### 3.3. Role of tourism in Karratha's economy

#### 3.3.1. Visitor spend

Table 4 demonstrates that visitors spent an estimated \$293m in Karratha. While domestic overnight visitors represent 51% of total visitation to Karratha, they account for a much larger proportion of spend (81%). Similarly, while international overnight visitors represented 4% of visitation, they generated 8% of spend - this demonstrates the higher yielding nature of the overnight (domestic and international) visitor markets.

The recommendations in this DMP deliberately focus on commissionable product (that is, paid tourism product) which will assist in growing average visitor spend in Karratha, rather than focusing purely on growing total visitor numbers; yieldless volume is a scenario to be avoided.

Table 4: Visitor spend in Karratha (based on a three-year average from 2016-18)<sup>35</sup>

	Est. Spend p/visitor (\$)	Visitation (2016-18)	Visitation Split (%)	Total Spend (\$)	Total Spend Split (%)
Domestic Overnight	\$1,247	191k	51%	\$238m	81%
Domestic Day	\$187	167k	45%	\$31m	11%
International Overnight	\$1,727	14k	4%	\$24m	8%
<b>Total</b>	-	<b>372k</b>	<b>100%</b>	<b>\$293m</b>	<b>100%</b>

<sup>34</sup> Ibid

<sup>35</sup> Visitor data is based on the IVS and NVS.

Spend per visitor data for international and domestic overnight visitors is based on 2015 data (most recent data released) from the Karratha LGA Profile distributed by TRA ([https://www.tra.gov.au/tra/2016/Tourism\\_in\\_Local\\_Government\\_Areas\\_2016/reports\\_/Karratha%20\(C\)\\_2015.xlsx](https://www.tra.gov.au/tra/2016/Tourism_in_Local_Government_Areas_2016/reports_/Karratha%20(C)_2015.xlsx)). Spend per visitor data for domestic day trip visitors is based on 2015 data (most recent data released) from the the Australia's North West Tourism Region Profile distributed by TRA ([https://www.tra.gov.au/tra/2016/Tourism\\_Region\\_Profiles/reports/regional\\_profiles\\_2015/Australias\\_North\\_West\\_Demand\\_2015.xlsx](https://www.tra.gov.au/tra/2016/Tourism_Region_Profiles/reports/regional_profiles_2015/Australias_North_West_Demand_2015.xlsx)). Spend data for the domestic day trip market for Karratha LGA is not available hence why Australia's North West data has been used and applied to Karratha visitation.

### 3.3.2. Employment and output

Table 5 provides a summary of employment and output generated through the visitor economy. It demonstrates the following.

- Over 800 people are employed in the tourism sector in Karratha, representing 5.3% of total employment. This is an increase of 120% (438 workers) since 2007.
- As a composition of total employment, the tourism sector grew from comprising 2.9% in 2007 to 5.3% in 2016.
- Of the 800 people employed, 83% are employed in full-time positions.
- The sector generated just under \$156m in output, comprising 1.4% of total output. This is an increase of \$80.1m over the last 10 years.
- As a proportion of total employment and economic output, the visitor economy represents a small share. This is because of the dominance of the mining and resource sector and the fact that there has been little investment and reinvestment into Karratha's tourism product and infrastructure over the last decade or so.

Industry feedback noted that at one stage (8-10 years ago), Karratha actually had more tourism operators (certainly far more water-based operators charter boat operators) than it has today. However, as the mining and resource sector matured, and tourism employment became harder to fill, there was a lack of market demand (primarily as a result of a reduced local population base) to support these tourism operators.

**Table 5: Tourism employment and output in Karratha (2007-2016<sup>36</sup>)**

	2006/07			2015/16			Karratha Change 2006/07 - 2015/16
	Karratha	% of total industry	WA %	Karratha	% of total industry	WA %	
<b>Employment (total)</b>							
Direct	309	2.4%	6.1%	683	4.5%	5.6%	▲ 374 (121%)
Indirect	54	0.4%	2.3%	120	0.8%	2.1%	▲ 66 (122%)
<b>Total</b>	<b>364</b>	<b>2.9%</b>	<b>8.3%</b>	<b>802</b>	<b>5.3%</b>	<b>7.7%</b>	<b>▲ 438 (120%)</b>
<b>Employment (FTE)</b>							
Direct	298	4.7%	11.0%	565	7.4%	9.3%	▲ 267 (90%)
Indirect	55	0.9%	5.4%	104	1.4%	4.5%	▲ 49 (89%)
<b>Total</b>	<b>353</b>	<b>5.6%</b>	<b>16.4%</b>	<b>669</b>	<b>8.7%</b>	<b>13.8%</b>	<b>▲ 316 (90%)</b>
<b>Output/Sales (\$m)</b>							
Direct	\$63.2m	0.5%	2.8%	\$130.1m	1.1%	2.3%	▲ \$66.9m (106%)
Indirect	\$12.4m	0.1%	1.6%	\$25.5m	0.2%	1.3%	▲ \$13.1m (106%)
<b>Total</b>	<b>\$75.5m</b>	<b>0.6%</b>	<b>4.3%</b>	<b>\$155.6m</b>	<b>1.4%</b>	<b>3.6%</b>	<b>▲ \$80.1m (106%)</b>
<b>Value added (\$m)</b>							
Direct	\$24.6m	0.3%	3.2%	\$62.2m	0.8%	2.7%	▲ \$37.6m (153%)
Indirect	\$5.1m	0.1%	1.6%	\$12.8m	0.2%	1.3%	▲ \$7.7m (151%)
<b>Total</b>	<b>\$29.6m</b>	<b>0.3%</b>	<b>4.8%</b>	<b>\$75.0m</b>	<b>0.9%</b>	<b>4.0%</b>	<b>▲ \$45.4m (153%)</b>

<sup>36</sup> 2015/16 is the most recent data provided through Economy ID - <https://economy.id.com.au/karratha/tourism-value?Tourismtype=3&EndYear=2011>

### 3.4. SWOT analysis

The following provides a SWOT analysis for Karratha as a visitor destination.

**Table 6: SWOT analysis of Karratha as a destination**

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> <li>▪ A young and motivated population who enjoy an active lifestyle</li> <li>▪ High-quality health services</li> <li>▪ Weather</li> <li>▪ Small community with big city facilities</li> <li>▪ High-quality natural landscape</li> <li>▪ Significant Aboriginal rock art and culture</li> <li>▪ Major airport (second busiest in WA) with international flight capability</li> <li>▪ Educated and skilled workforce</li> <li>▪ Largescale port facilities</li> <li>▪ High-quality sporting facility infrastructure</li> <li>▪ Proximity to major national park areas</li> <li>▪ Strong and well-attended community events program</li> <li>▪ High-quality trail signage and information bays</li> <li>▪ Being the gateway to the Millstream Chichester National Park</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cost of accommodation</li> <li>▪ Limited diversity of accommodation on offer</li> <li>▪ Limited high-quality accommodation options</li> <li>▪ Access to natural attractions can be challenging without a 4WD or a boat</li> <li>▪ Activating Aboriginal tourism product on a consistent basis</li> <li>▪ High wages in other sectors</li> <li>▪ The high cost of food and beverage</li> <li>▪ Lack of major destination events calendar &amp; signature event</li> <li>▪ Lack of tourism investment/reinvestment</li> <li>▪ Limited commissionable, tourism product</li> <li>▪ Limited evening activities/night time economy</li> <li>▪ Limited higher-quality dining options or unique food experiences</li> <li>▪ Limited visibility of indigenous significance</li> <li>▪ Confusing online presence</li> <li>▪ Digital-savviness of operators</li> <li>▪ Limited host community awareness of the growth potential of the visitor economy</li> <li>▪ Limited product packaging</li> <li>▪ Limited profiling of Karratha as a destination</li> <li>▪ Perception of Karratha as a mining destination</li> <li>▪ Lack of tourism sector coordination, collaboration and structure</li> <li>▪ Lifestyle operators</li> <li>▪ Lack of customer service</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ensure tourism industry operators are represented on the TAG</li> <li>▪ Industry networking and information sessions</li> <li>▪ Industry training and upskilling</li> <li>▪ Branded, higher-quality hotel property</li> <li>▪ Council incentivisation for private investment</li> <li>▪ Dampier Marina as a hub for water-based recreation</li> <li>▪ A quality outdoor evening dining experience</li> <li>▪ Higher-Quality Destination Holiday Park</li> <li>▪ Investment memorandum and facilitation of investment forums</li> <li>▪ Island small scale glamping facility</li> <li>▪ Karratha Airport as a light aircraft, gliding and recreation hub</li> <li>▪ Murujuga Living Knowledge Centre project enhancements</li> <li>▪ Events to leverage natural assets such as a Big Red Fishing Competition</li> <li>▪ Event toolkit</li> <li>▪ Light show leveraging off and showcasing Karratha's natural environment</li> <li>▪ Major destination sports event</li> <li>▪ Red Earth Arts Precinct National Exhibition &amp; Event Program</li> <li>▪ Assessment of visitor information services (and relocation of the VC to a town centre location)</li> <li>▪ ATDW audit and listing</li> <li>▪ Product packaging</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competition from other destinations, particularly those within Australia's North West region</li> <li>▪ Interstate and intrastate competition</li> <li>▪ A downturn in the economy – reducing disposable income used for travelling and day trips</li> <li>▪ Lack of new private sector investment and reinvestment</li> <li>▪ Local residents' attitude ambivalent to tourism</li> <li>▪ Lack of support from the State Government to be recognised as a region or as offering a clear tourism proposition</li> <li>▪ Continuing rise in consumer prices associated with major growth in the mining and resource sectors</li> <li>▪ Lack of commissionable product</li> </ul>

## 3.5. Supply-side assessment of tourism product

A supply-side audit has been undertaken on both accommodation and tourism product within Karratha. It is important to note that while the audit provides a quantitative assessment of the number and type of product, it does not include a qualitative assessment (i.e. a review of the quality of product).

### 3.5.1. Tourism product/experience audit

#### 3.5.1.1. Audit summary

Table 7 provides a summary of the tourism assets and product which is situated within Karratha LGA.<sup>37</sup> The product categorisation aligns with categories used by Tourism Australia. It demonstrates the following.

- In total, the audit identified 54 tourism-related attractions and experiences.
- The majority of experiences (paid or free) are *Aboriginal, History & Culture* product, representing 33% of product identified. This is followed by *Sport and Adventure* (26%) and *Aquatic & Coastal* (17%).
- The majority of *Sport and Adventure* product appears to primarily serve a local community, rather than being major tourism drawcards. This includes product such as aquatic facilities, skate parks and sporting facilities etc. which also exist in most other council areas and is mainly for recreational use.
- Importantly, the majority of product identified is free (57%). While having free things for visitors to do is an important part of any visitor economy, there is a balance required. To grow visitor yield in Karratha requires introducing more commissionable tourism product which could be in the form of paid tours, admission prices, packaged product etc.
- A key point of difference for Karratha is its proximity and access to mining and resources sector infrastructure. While there are mining and resource sector tours offered by the Karratha VC, as identified in the Karratha Tourism Ventures Feasibility Study, it is not a particularly immersive or high touch experiences. While this is suitable for some of the grey nomad market, encouraging a higher yielding market to undertake these tours in their current form is challenging. Innovative ways of leveraging off this strength for Karratha need to be found.

**Table 7: Attractions and experiences audit for Karratha<sup>38</sup>**

Product Category	Count	%
<b>Free</b>	<b>31</b>	<b>57%</b>
Aboriginal, History & Culture	15	28%
Lookouts	6	11%
Aquatic & Coastal	3	6%
Visitor Information	2	4%
Sport & Adventure	2	4%
Nature & Wildlife	2	4%
Mining & Resource	1	2%
<b>Paid</b>	<b>23</b>	<b>43%</b>
Sport & Adventure	12	22%
Aquatic & Coastal	6	11%
Aboriginal, History & Culture	3	6%
Nature & Wildlife	1	2%
Mining & Resource	1	2%
<b>Total</b>	<b>54</b>	<b>100%</b>

<sup>37</sup> It is important to note this is a top line audit completed via a desktop research exercise. It, therefore, may exclude those attractions which are not currently listed on major destination websites. The audit was also provided to Council for verification.

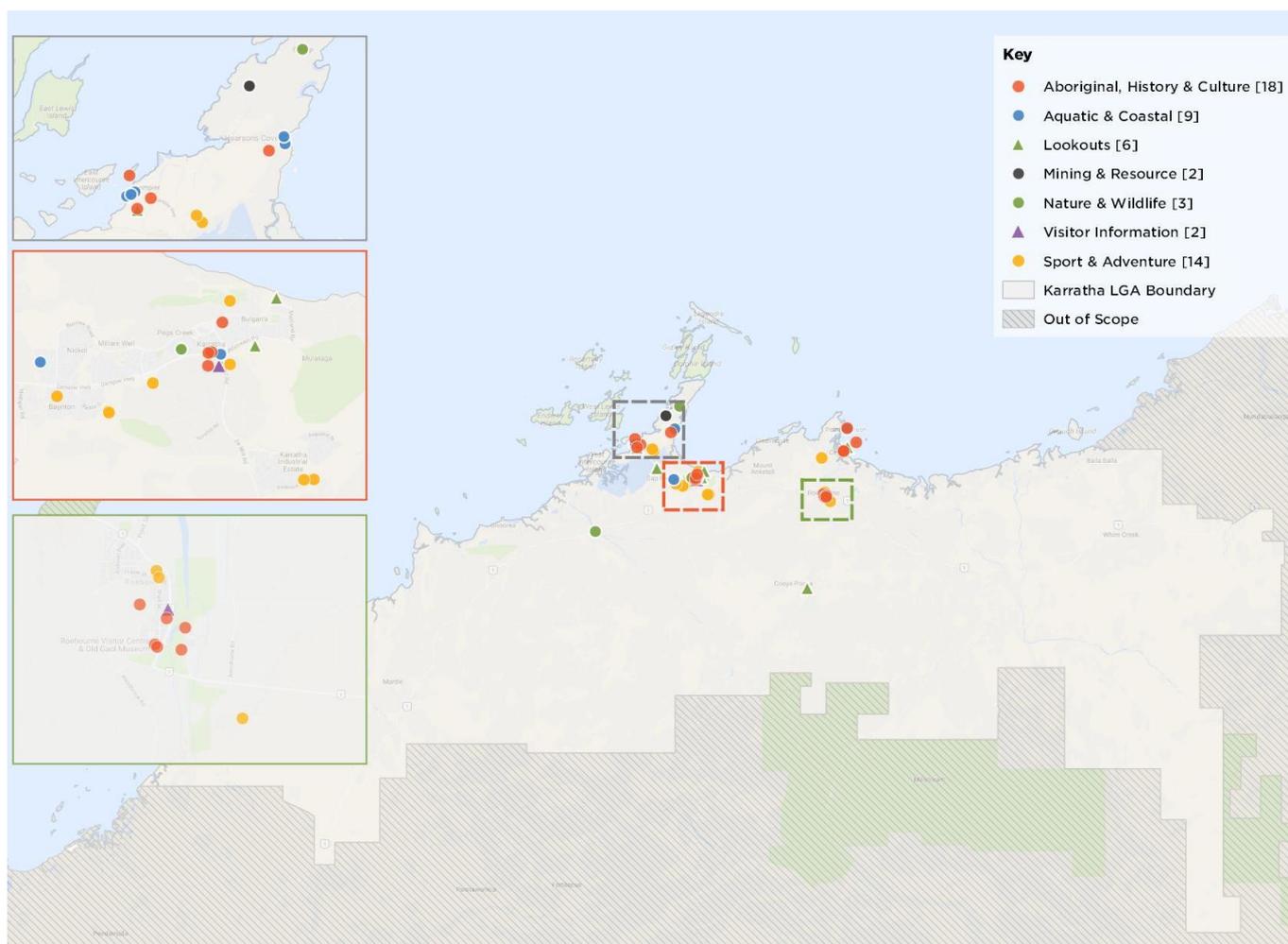
<sup>38</sup> The full findings of the audit are in Supporting Documentation 1.

### 3.5.1.2. Spatial summary

Figure 15 spatially maps the product offering in Karratha. It demonstrates that:

- tourism product is primarily clustered around, or within close proximity to, the major hubs of Karratha including Karratha CBD, Dampier and Roebourne;
- there is little tourism product situated elsewhere in the LGA;
- while Karratha has extensive water-based assets and islands, there is little product that leverages off this currently;
- although Millstream Chichester National Park is primarily accessed through Karratha, the National Park does not actually fall within the LGA’s boundaries; and
- the driving distances from Karratha to Dampier, Cossack and Roebourne are relatively short and easily accessible, whilst Millstream requires a half day of travel to get their and back from Karratha.

Figure 15: Product spatial audit

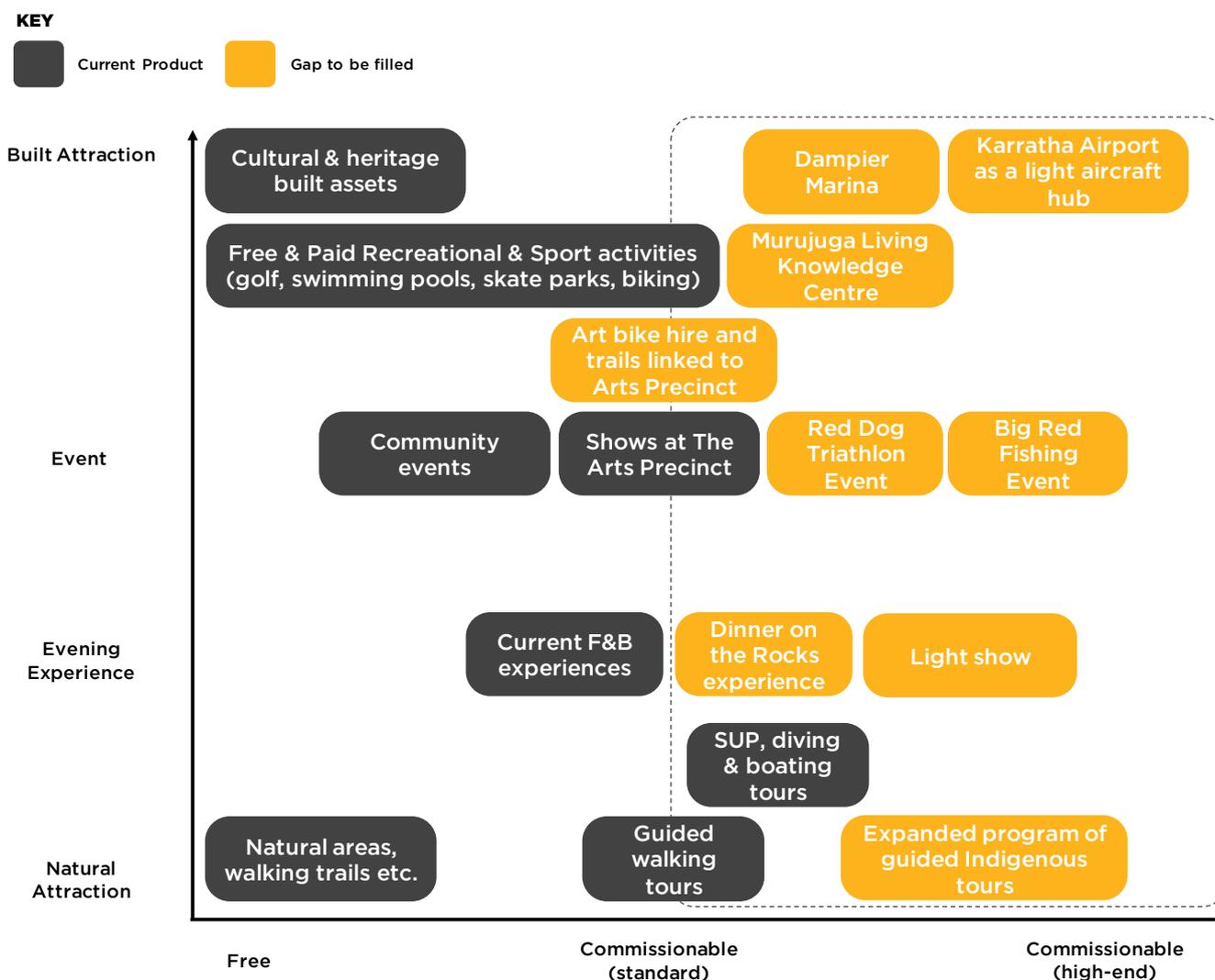


### 3.5.1.3. Gap analysis

Figure 16 provides a gap assessment of the attractions/experiences sector in Karratha. It demonstrates that:

- there is a larger amount of free and self-guided product;
- free and paid recreational activities generally include those which are offered in many other surrounding LGAs – such as swimming pools, skate parks, golf etc. - so do not provide a unique point of difference for Karratha;
- there are limited evening-based experiences to encourage a longer length of visitor stay and to provide experiences which locals can enjoy rather than having to travel out of the LGA to undertake evening-based activities;
- there are no unique food tourism experiences currently offered;
- there is limited product which allows visitors to interact with Karratha’s natural assets; and
- there is limited all-weather product.

Figure 16: Product gap assessment



### 3.5.2. Accommodation audit

#### 3.5.2.1. Audit summary

Table 8 provides a summary of the accommodation audit for Karratha.<sup>39</sup> The audit is focused on accommodation facilities which cater to the tourism market, rather than mining and FIFO accommodation. The top line audit demonstrates the following.

- There are 50 accommodation properties and camping sites in Karratha. *Hotel and motels* (with motels comprising the vast majority) make up the largest share, comprising 22% of properties.
- In total, there are 856 rooms<sup>40</sup> in Karratha. Hotels offer the largest supply of room numbers (558 or 65% of room stock).
- Karratha also has a significant FIFO accommodation product which is not included in this audit. It is estimated that there are 10 of these properties which collectively offer over 1,600 small rooms.

**Table 8: Accommodation audit for Karratha (sorted by number of rooms)<sup>41</sup>**

Category	Properties/ Sites	Properties %	Rooms	Rooms %	Powered/ Unpowered Sites	Sites %
Hotel and motel	11	22%	558	65%	n/a	0%
Holiday Park	3	6%	108	13%	324	68%
Transit Caravan Parks	5	10%	80	9.3%	153	32%
Serviced and Self- Contained Apartment	4	8%	79	9.2%	n/a	0%
Backpackers and Budget Accommodation	2	4%	17	2.0%	n/a	0%
BnB and Airbnb	6	12%	14	1.6%	n/a	0%
Campsites <sup>42</sup>	19	38%	n/a	0%	n/a	0%
<b>Total</b>	<b>50</b>	<b>100%</b>	<b>856</b>	<b>100%</b>	<b>477</b>	<b>100%</b>

<sup>39</sup> It is important to note this is a top line audit completed via a desktop research exercise. It, therefore, may exclude those properties which are not currently listed on major accommodation and destination websites. The audit was also provided to Council for verification.

<sup>40</sup> Note, for backpacker accommodation, the number of beds has been included to account for the fact that groups usually share this style of accommodation.

<sup>41</sup> The full findings of the audit are in Supporting Documentation 2.

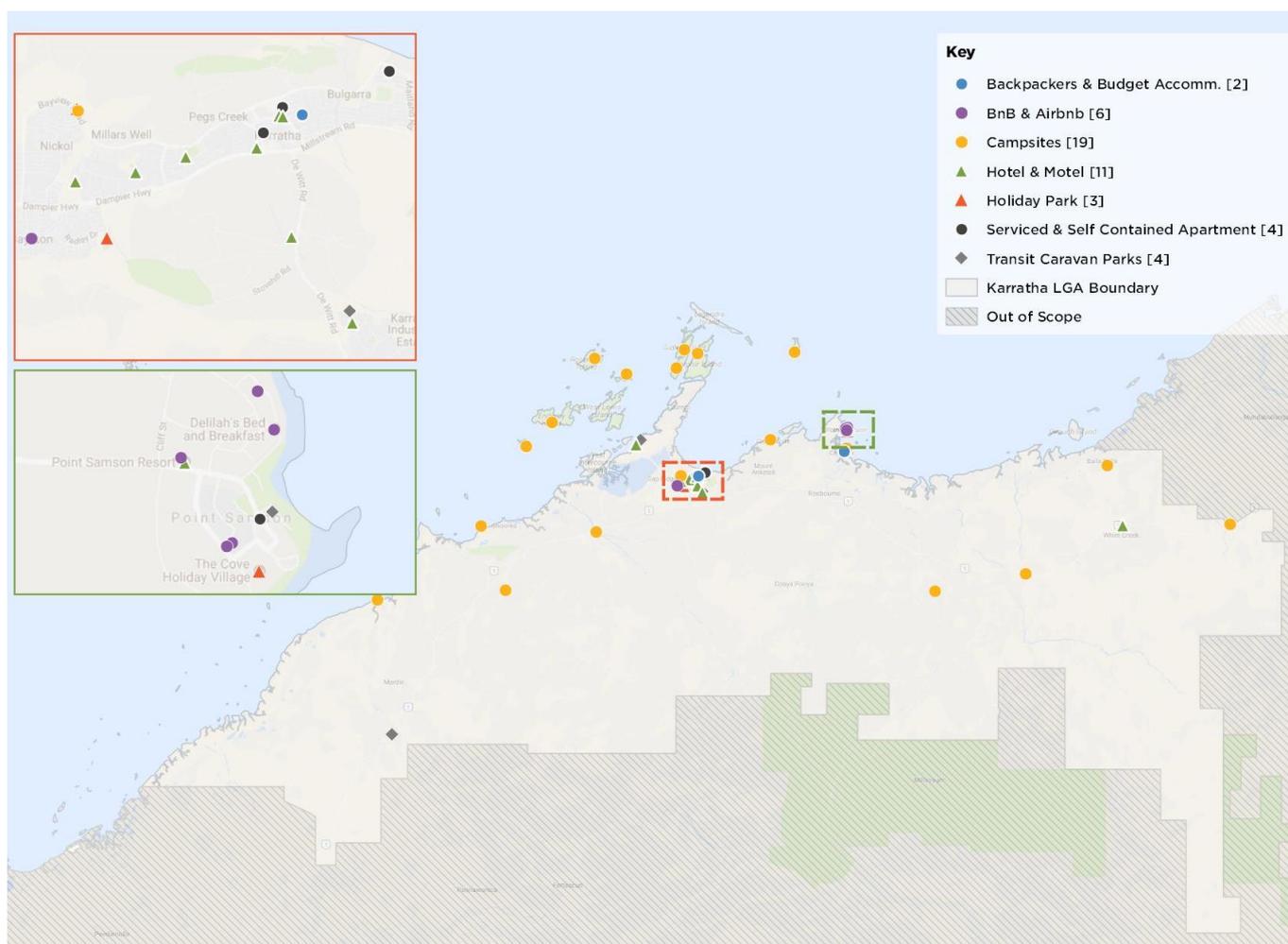
<sup>42</sup> This includes areas where camping is permitted, including on the various islands in the Dampier Archipelago.

### 3.5.2.2. Spatial summary

Figure 17 spatially maps the accommodation offering in Karratha. It demonstrates that:

- the vast majority of hotel/motel stock is clustered around the Karratha CBD;
- there is very little accommodation dispersed in other parts of Karratha, aside from camping grounds; and
- while free camping is not permitted throughout the LGA, there are sites where camping is permitted, including on various islands throughout the Dampier Archipelago;

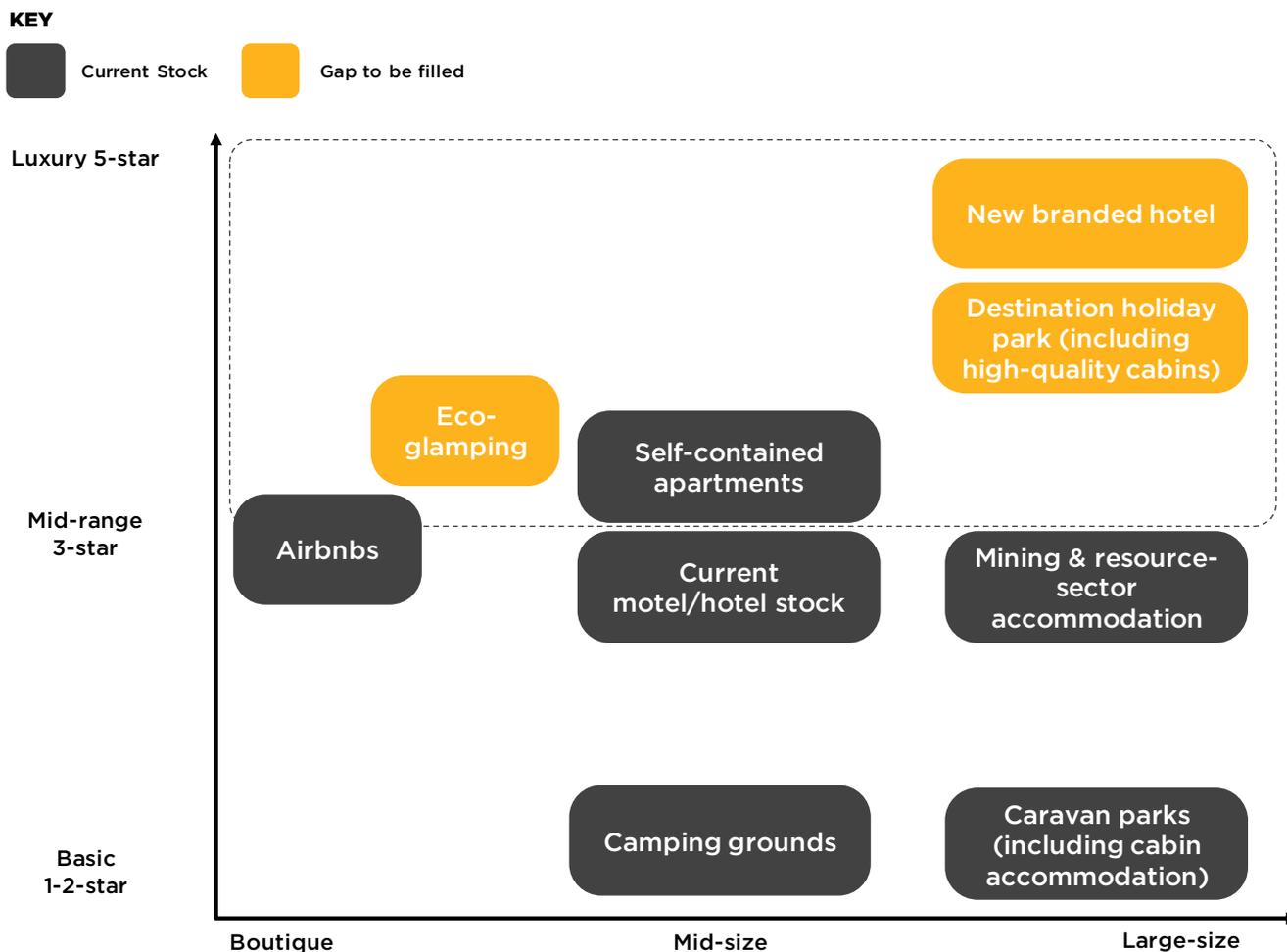
Figure 17: Accommodation spatial audit



### 3.5.2.3. Gap analysis

Figure 18 demonstrates that the majority of Karratha’s current accommodation stock falls within the 2-3-star category. There are gaps in the higher-quality accommodation segment (3.5-star plus). The opportunity exists to consider: introducing a new internationally branded and higher-quality hotel; a higher-quality destination holiday park (which caters to visitors only, rather than permanents or FIFOs) as well as a small-scale boutique eco-glamping property. A higher quality accommodation offer is required if Karratha wants to encourage a higher yielding visitor market to help support more commissionable product and recognising that the bulk of the current grey nomad market has limited disposable spend.

Figure 18: Accommodation gap assessment



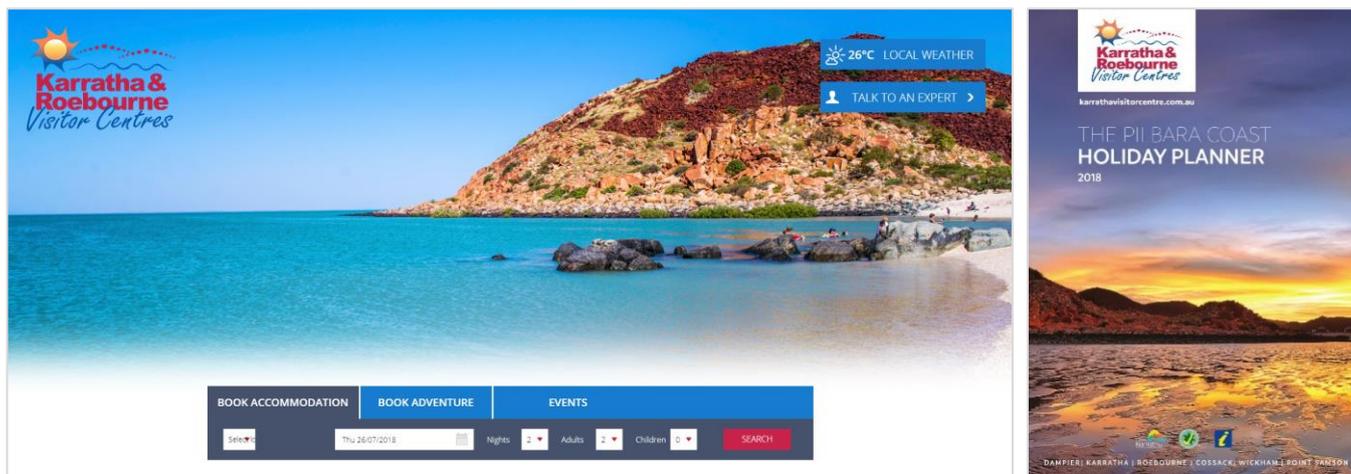
### 3.6. Karratha’s current destination brand

#### 3.6.1. Online presence

The majority of destination marketing material for Karratha is currently distributed through the Karratha VC. The branding is focused on the Visitor Centre, rather than the destination. The destination guide also features the brand “The Pilbara Coast”.

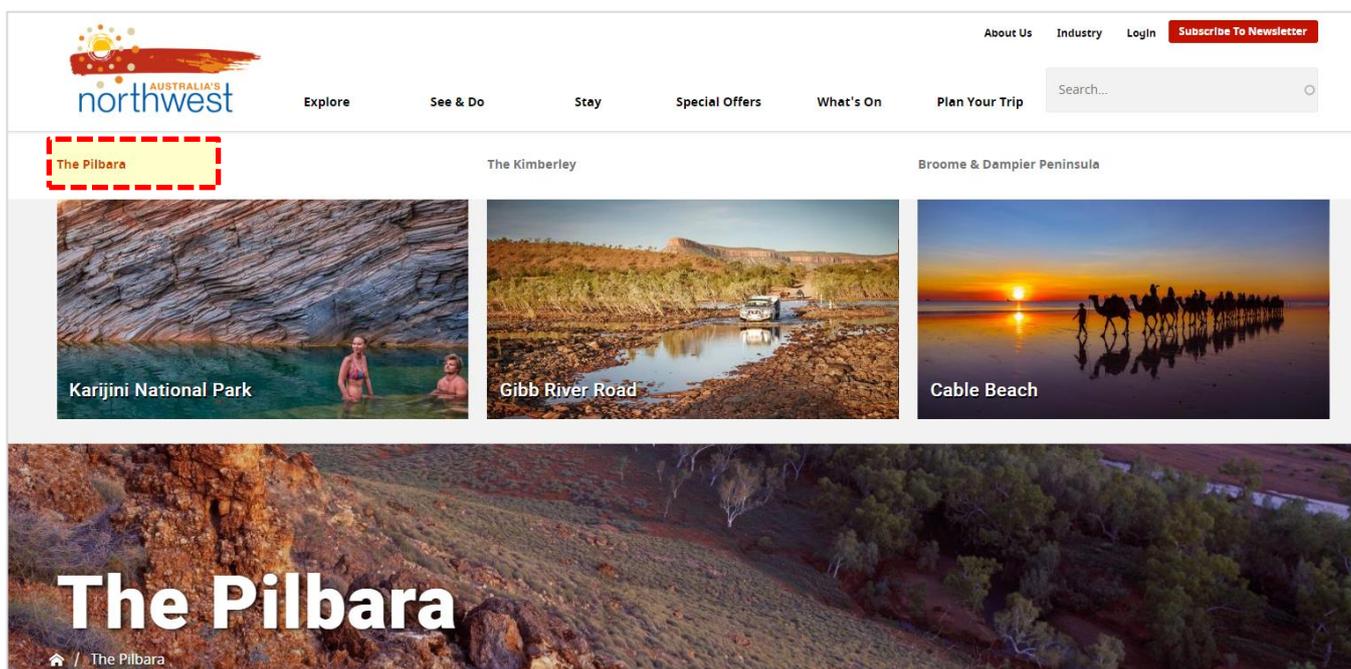
A top line assessment of this material, as well as other online collateral highlights that the focus of the branding is on nature-based, and primarily coastal experiences.

Figure 19: Primary destination website for Karratha & destination guide



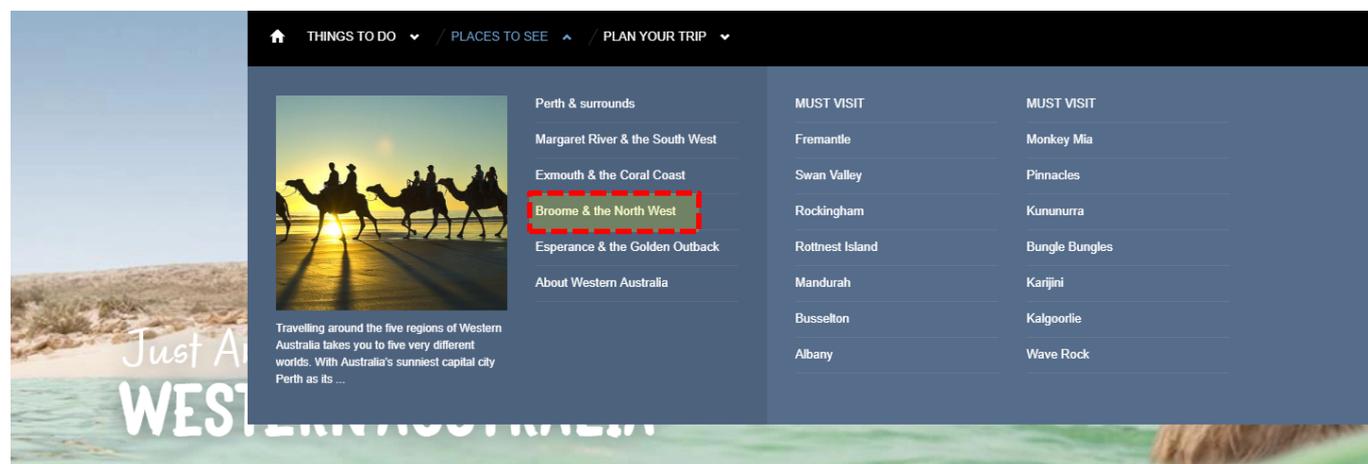
On Australia’s North West website (Figure 20), Karratha’s presence is not top of mind, but rather, is situated within The Pilbara region. The focus of product profile on Australia’s North West website is on natural attractions. There is little focus on commissionable tourism product. This is likely because there is currently limited commissionable product which is available in Karratha on a consistent year-round basis.

Figure 20: Profile on Australia’s North West website



On Tourism WA’s consumer-facing website, Karratha’s brand profile is even further limited, with Karratha situated under the “Broome & the North West” category. While having Karratha listed as a destination in its own right under the places to see would be difficult because this appears to be based on regional tourism boundaries, the opportunity does exist for Karratha to be profiled under the “Must Visit” categories. To do this will require introducing unique, export-ready experiences which are available consistently which Tourism WA can promote, at national and international events and to major touring wholesalers.

Figure 21: Profile on Tourism WA’s consumer-facing website<sup>43</sup>

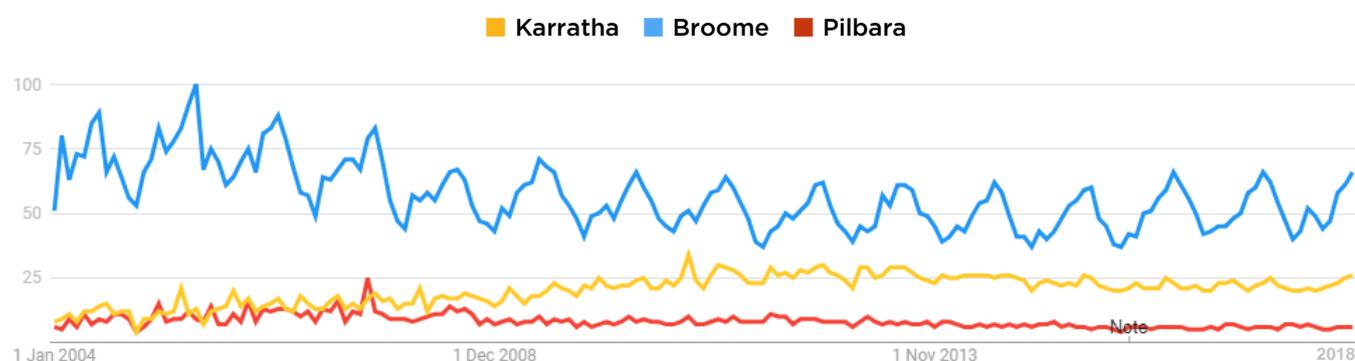


### 3.6.2. Search indexes

Figure 22 provides a summary of the number of times the term “Karratha” is entered into Google. A comparison is provided with Broome and the Pilbara. The numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular. It demonstrates that:

- the brand of Broome has been in decline (this is recognised in Broome’s Tourism Strategy<sup>44</sup>), with peak popularity being recorded from 2005-2007;
- Karratha’s brand awareness has grown, increasing gradually over the period assessed;
- Karratha’s brand awareness appears to be stronger than the Pilbara’s brand;
- key rising search terms related to Karratha in Google include: “Karratha to Perth flights”, “Karratha medical”, “Qantas” but terms such as “things to do in Karratha” and “Karratha tourism” do not rate.

Figure 22: Karratha search indices compared with Broome and the Pilbara<sup>45</sup>



<sup>43</sup> www.westernaustralia.com/

<sup>44</sup> Broome Tourism Strategy Full Report, page 31

<sup>45</sup> https://trends.google.com/trends/explore

### 3.7. Tourism governance

There are a number of organisations which are associated with tourism governance and direction in Karratha. These include national-bodies such as Tourism Australia, through to Karratha’s Tourism Advisory Group, the Karratha Visitor Centre as well as other tourism industry stakeholders within Karratha including those involved more generally with economic development.

Figure 23: Tourism governance structure chart





## 4. Barriers to Growth as a Destination

Table 9 outlines the barriers to growth which were identified during the research and analysis undertaken for this DMP. They have been segmented according to the following categories.

- Accommodation barriers
- Product and supporting infrastructure barriers
- Marketing and destination awareness barriers
- Governance and industry collaboration barriers

**Importantly, while this section outlines the barriers identified, Section 6 of this DMP highlights opportunities on how many of these barriers can be mitigated and positive outcomes achieved.**

Table 9: Barriers to growing Karratha’s visitor economy

Category	Barrier	Description
<b>Accommodation barriers</b>	Limited diversity of accommodation offer	While Karratha is fortunate to have ample motel room stock, there is limited: self-contained room stock; boutique-style accommodation (glamping, eco-chalets etc.); as well as higher quality destination holiday parks.
	Limited high-quality accommodation options	As outlined in section 3.5.2, Karratha’s accommodation product primarily comprises motel stock of variable quality, making up 65% of beds within the LGA. Feedback indicated that much of this room stock is in need of refurbishment.  To attract a higher yielding visitor market, there is a need to rejuvenate this room stock where possible, as well as introducing higher-quality options in Karratha.
	The high cost of accommodation	The cost of accommodation in Karratha is high and the price point of accommodation does not always match the quality on offer. This has been driven by high demand for accommodation by the mining sector, in particular, and a minimal increase in supply, and product reinvestment, over the last 5-10 years.  Furthermore, much of Karratha’s accommodation product tries to cater to both a mining and traditional visitor leisure market. These uses are often not compatible.
<b>Product and supporting infrastructure barriers</b>	Access to natural attractions	One can rent boats and SUPs, however, the opportunities are limited and it is generally difficult to access the water. While we note there are experienced boating, diving and SUP operators in the LGA, the relatively small-scale nature of Karratha’s tourism sector has meant these operators are not able to consistently offer product on a daily basis (rather product generally has to be booked in advance). If Karratha wants to leverage off its natural attractions (the various islands in particular) as part of its branding and unique selling point (USP), there needs to be more options for visitors to access these assets, whether it be through hiring or organised tours.
	Activating Aboriginal tourism product	While Karratha has many significant Aboriginal cultural sites, including a collection of rock art, activating this product on a consistent basis for the tourism market is challenging. The current operator of Aboriginal cultural tours in Karratha is highly regarded, but there would appear to be limited succession planning and in instances where he is away, there is no fall-back position for others who are well trained to come in and run the tours in his absence.  If Karratha has a desire to position itself as a major Aboriginal cultural tourism destination, high-quality Aboriginal cultural tours need to be

Category	Barrier	Description
		“export-ready”; that is, they need to be offered on a regular basis, consistently so that tourism wholesalers and tour operators can be guaranteed that if they book a party or individuals on these tours, the product will be delivered and to a consistently high standard.
	High wage costs	The high wages of those in the mining sector creates challenges in encouraging residents in Karratha to work in sectors outside of the mining industry, including the tourism and hospitality sector.
	Lack of major destination events calendar	<p>While Karratha has a diverse community event portfolio, there is a limited number of events which would be considered true destination events. Karratha’s online event calendar<sup>46</sup> includes all these community events and it is currently unclear, from a visitor’s perspective, which events are major destination events (i.e. those events that draw a market from outside Karratha) and which are those that are primarily local community events.</p> <p>It is noted, however, that a destination events calendar will be integrated into the new destination website being developed by Council as part of the place branding strategy.</p>
	Lack of tourism investment	<p>While Karratha has received significant investment in the mining and resource, health and community recreation infrastructure sectors, in particular, there appears limited investment in Karratha’s tourism sector, particularly into attraction/experience-based product, from commercial developers and operators.</p> <p>Council has commissioned a variety of reports to stimulate investment in Karratha’s tourism sector, but the identified opportunities have not yet been able to be activated.</p> <p>While there are various reasons for this, stakeholder feedback has centred on state government agencies (DBCA) who control land as well as the major mining companies, who own and/or control major land areas, being reticent to allow tourism product to be established.</p> <p>These restrictions, unfortunately, are well known amongst the tourism development community and result in reduced investor/developer/operator interest.</p> <p>As a result, Karratha is seen by some as more difficult to get tourism development activated, so the risk to a potential operator is noted as higher. The likely returns on investment are not seen by some tourism operators and developers as sufficient to justify the risks which are often attributed to land managers and landowners, who restrict access to sites for tourism activities, or who are able to delay decision making so major time delays occur.</p> <p>This is noted as a lost opportunity for those working for mining and resource companies to benefit from a number of tourism product development opportunities for recreational use especially such as island glamping, fishing, new quality lodges and eco facilities etc. for rest and relaxation.</p>
	Limited commissionable, established tourism product	<p>Part of an ongoing challenge for Karratha in positioning itself as a visitor destination is the limited amount of commissionable tourism product available, packaged and actively promoted. Much of Karratha’s tourism promotion focus is centred on: free and natural experiences such as historic and nature-based walking trails and viewing experiences; and product which is located out of the LGA.</p> <p>While having free experiences is an important part of a vibrant visitor economy, a balance with commissionable (paid) experiences is needed to grow the visitor economy and reduce the reliance on Council funding to</p>

<sup>46</sup> <https://www.karratha.wa.gov.au/events>

Category	Barrier	Description
		the sector. It is also needed to ensure higher yielding visitation is being encouraged.
	Limited evening activities/night time economy	Karratha has a lack of evening activities, aside from dining and bar experiences. A vibrant night time economy is important not only from a visitor destination perspective but also for the local community.
	Limited higher-quality dining options	While Karratha does have a variety of cafés and bars to choose from, stakeholder feedback and analysis indicates a need to look at introducing higher quality product and service and a broader range of different dining experiences.
	Limited visibility of indigenous significance of Karratha	There are major sites of indigenous significance, particularly rock art sites, situated throughout Karratha. There is, however, limited visibility of this.
	No signature destination event	The current event program for Karratha, while comprehensive, is focused on community events rather than destination events (destination events are those which draw visitation from areas outside Karratha and its immediate surrounds).
	The high cost of food and beverage	<p>Dining options currently available in Karratha are expensive. These higher than average prices are driven by the remoteness of Karratha as well as the strong mining and resource sector in Karratha, resulting in wages far higher than the state and national average<sup>47</sup>.</p> <p>While overcoming this barrier is challenging, the opportunity exists to encourage future accommodation developments to offer quality in-house dining options where possible, as well as offering packages (accommodation, dining, experiences) which requires collaboration between accommodation, hospitality and experience operators. Attracting a higher spend visitor market will also help address this problem of high food and beverage prices acting as a deterrent to visitation and length of stay in Karratha.</p>

<b>Marketing and destination awareness barriers</b>	Confusing online presence	<p>The primary destination websites for Karratha include the Karratha visitor centre's website (karrathavisitorcentre.com.au) as well as Council's website (karratha.wa.gov.au/attractions). These websites are among the top 3 when the terms "visit Karratha", "Karratha tourism", "tourism in Karratha" and "best things to do in Karratha" are entered in Google.</p> <p>It is understand that Council is currently in the process of developing a new website for Karratha as part of their place branding strategy.</p> <p>While positioning Karratha as a hub to undertake experiences in the broader region from is important, there is also a need to audit product available through the new Karratha destination website to ensure it promotes, first and foremost, product available within the LGA and its immediate surrounding areas (such as major national parks). Currently, the website for the Karratha Visitor Centre (VC) includes a plethora of product which is only available in Broome or Exmouth and this creates confusion for visitors.</p>
	Digital-savviness of operators	<p>Although there are some operators in Karratha who have an up-to-date digital presence, there are some who lack the tools for developing this. There is a need to ensure that all tourism operators in Karratha are listed on the ATDW which is free for WA-based operators<sup>48</sup>.</p> <p>The ATDW is Australia's national tourism database and distribution platform. It currently represents over 40,000 small and medium-sized tourism products and destinations. Its ultimate function is to support the</p>

<sup>47</sup> Over 47% of households in Karratha are ranked in the "highest group quartile" for household income. This compares with the WA average of 25% and a national average of 22% (<https://profile.id.com.au/karratha/household-income-quartiles?BMID=50>)

<sup>48</sup> <https://www.tourism.wa.gov.au/marketing/How-to-get-involved/Digital-Marketing/Pages/Get-listed-online.aspx>

Category	Barrier	Description
		<p>Australian tourism operators with digital marketing to help extend their exposure and attract more business online. Through a single listing, an operator's details will then appear on <i>Australia.com</i> and over 50 other websites such as such as <i>about-australia.com.au</i> and <i>planbooktravel.com.au</i>.</p>
	<p>Limited host community awareness of the growth potential of the visitor economy</p>	<p>While the visitor economy is not Karratha's largest industry, it does play a key role in its economy, employing over 802 people (accounting for 5.3% of jobs in the LGA) and generating over \$155m in economic output (1.4% of total economic output).<sup>49</sup></p> <p>Additionally, what these statistics do not demonstrate is that the visitor economy is not just confined to one traditional economic sector, but rather, comprises many sectors (such as transport, education, accommodation, training, food and beverage etc.). Growing the visitor economy, therefore, can generate broad-ranging benefits across a range of economic sectors.</p> <p>There is a need for Karratha's residents (the host community) to understand that a diverse economy will play a key role in its future success and sustainability. While mining and construction etc. will likely always be important sectors for Karratha, the visitor economy provides many opportunities to diversify Karratha's economic base and many of these opportunities have strong synergy and complementarity with other economic sectors.</p>
	<p>Limited product packaging</p>	<p>There is limited product packaging available on destination-based websites for Karratha and existing operators comment that finding suitable product to package is challenging. As additional new, marketable product is introduced in Karratha, there is a need to develop packages which visitors can book, rather than providing suggested itineraries. Packages could include accommodation, transport, guided walks/cycling, food and beverage etc.</p> <p>There is also a need for industry training and up-skilling to identify opportunities for packaging product of a similar quality.</p>
	<p>Limited profiling by Australia's North West and Tourism WA</p>	<p>Currently, feedback indicated that profiling by Australia's North West and Tourism WA is largely focused on Broome and the Kimberley. While an online audit confirms this, regional and state tourism bodies tend to focus marketing on destinations which have high-quality, export-ready tourism product. Tourism WA's brand platform "experience extraordinary" focuses on the highly unique experiences which can be undertaken throughout WA. While Karratha has a 5-star natural environment and high-quality cultural assets, there is a need to create 5-star built experiences and tourism product to showcase these.</p>
	<p>Perception of Karratha as a mining destination</p>	<p>While the mining and resource sector has generated a wide variety of benefits for Karratha, the dominance of the sector has also meant that awareness of Karratha is primarily focused on this sector. Research commissioned by Tourism Western Australia highlighted that the Pilbara region (which Karratha is part of) is primarily understood as being a centre of industry (mining) rather than a tourist destination (see section 2.5 for more details).<sup>50</sup></p> <p>To overcome this organic positioning, there is a need to develop new tourism product (and enhance existing product) which leverages off Karratha's strengths. Concurrent to this, there is also a need to actively market Karratha as a tourism destination to overcome the perception that Karratha is not a destination in its own right.</p>

<sup>49</sup> <https://economy.id.com.au/karratha/tourism-value>

<sup>50</sup> <https://www.tourism.wa.gov.au/Research-Reports/Specialised-Research-Reports/Pages/Destination-perceptions-research.aspx#/>

Category	Barrier	Description
	The positioning of Karratha as a destination is unclear	The brand positioning of Karratha as a visitor destination is not clear. While the majority of feedback surrounding Karratha’s USP focused on natural areas and Aboriginal culture, there are a variety of destinations state and nation-wide who would also claim this as their USP.
<b>Governance and industry collaboration barriers</b>	Lack of tourism sector coordination, collaboration and structure	<p>Operator feedback has indicated that Karratha’s visitor economy has had limited coordination; lacks a unified approach to delivering marketing outcomes and tourism development; and is fragmented, without a strong unity of purpose.</p> <p>Concerns were also expressed regarding the level of communication between industry groups and Council and that a clear demarcation is required on areas where Council should take the lead role and where industry should take the lead to avoid overlap, duplication and disagreement.</p> <p>Achieving a cooperative model which gets the buy-in of key stakeholders is an important outcome going forward. Council has a key role to play as “the honest broker” and enabler/facilitator for tourism, helping to drive change and bringing parties together to invest.</p> <p>Council also has a key role in seeking funding and related support from State and Federal Government to help activate tourism-related infrastructure opportunities.</p> <p>And from time to time, Council may also need to be an initial tourism project seed funder, to encourage project activation and to show their support for specific projects; this is also seen as important to help reduce investor risk.</p>
	Lifestyle operators	There is a proportion of Karratha’s tourism industry operators who are seen to be more lifestyle rather than full commercial operators. This is a major limitation for Karratha going forward in developing as a true visitor destination though we suspect the reason for this is due to lack of market demand limiting product demand.
	Large number of small operators	Karratha has no larger-scale commercial tourism operators. While the boutique nature of many operators in Karratha may offer a more personalised experience for visitors, there is a balance required as larger-scale operators tend to bring with them larger marketing budgets which not only markets their product but also Karratha.



## 5. Destination Mission & Target Markets

### 5.1. The mission and activation areas

To guide the continued development of Karratha as a destination and to strengthen the visitor economy, it is important that a destination mission is created which industry and all stakeholders buy into and support. The destination mission proposed is outlined in Figure 24 below, along with four activation areas which sit under this mission statement. The opportunities outlined in Section 6 are categorised under these activation areas.

From this mission statement and activation areas, Council and stakeholders should work to define an aspirational destination vision to work towards.

Figure 24: The DMP mission and activation themes

### OUR DESTINATION MISSION

By 2030, Karratha will aim to double current visitor spend and aim to be in the top ten places to visit in Western Australia. This will be achieved through growing overnight visitation, introducing a stronger destination event program and actively encouraging tourism investment into new products and experiences.

### ACTIVATION AREAS

#1



#### Working better together

Ensuring there is greater collaboration between Council and industry. This is an important first step to developing a strong and sustainable visitor economy.

#2



#### Growing demand through development & investment

While Karratha's natural beauty and assets are of high quality, to grow Karratha's visitor economy requires introducing new and unique things for visitors to do which leverage off these assets and which generate commissionable product.

#3



#### Diversifying and growing destination events

Although community events are important, to raise the profile of Karratha as a destination there is a need to introduce 1-2 signature Karratha destination events.

#4



#### Promoting Karratha as a vibrant destination

Improving the positioning and awareness of Karratha through improved branding and destination visitor information. And ensuring that a united and collective marketing messaging approach is followed.

## 5.2. Target markets

Currently, Karratha's primary visitor market is a domestic one. The vast majority of visitors come from WA comprising 91% of all visitation in 2018 (March YE). The largest interstate market for Karratha is Victoria, comprising 37% of all interstate visitation, followed by Queensland (31%) and NSW (22%). The largest proportion of visitors are business travellers. The leisure-based market to Karratha primarily comprises grey nomads (as part of a longer trip around Australia or WA) and those visiting friends and relatives.

Based on the recommendations included in this DMP, Karratha should aim to, over time, reposition itself to attract a more diverse and ideally higher yielding visitor market. Because the visitor economy is at a relatively embryonic stage, we would heed caution on focusing in too closely on one or two target markets. Rather, there are a variety of markets which present opportunities for Karratha. These are outlined below.

- Short break leisure market (3-4 days) coming from major generating markets such as Melbourne, Sydney, Adelaide and Brisbane for fishing, art and other niche activities.
- Those coming from interstate for competitions and events associated with triathlons, fishing competitions, state and national level sporting events, art and cultural events.
- A broader business market coming intrastate and interstate for product launches (whether associated with mining and resource sector equipment), forums, small-scale conferences.
- Special interest intrastate and interstate car clubs, motorbike clubs and light aircraft clubs coming for events and recognising that Karratha has many technicians covering auto electricians, mechanics etc who work in the mining, resource and supporting sectors so there is a large skill base to leverage off.
- Short break 4-5 day special interest fishers and bird watcher's tours coming from south and northeast Asia (Singapore, Hong Kong, Shanghai, South Korea, Taiwan and Japan).
- Special interest art and cultural tours often coordinated by major public art museums in major cities throughout Australia and covering photography events and tours, painting etc.



## 6. Delivering on Karratha's Destination Mission Statement

To deliver on the destination mission statement for Karratha requires the activation of various opportunities. While there have been a number of tourism-related strategies completed for Karratha in the past, the associated private investment required to activate the opportunities identified has not yet materialised. To avoid a scenario where this DMP is merely a 'wish list', this section focuses on a refined list of opportunities, with a strong emphasis on how to activate them.

It is important to note that these are provided as examples only of potential opportunities for Karratha to stimulate ideas and discussion. They are not a definitive list of all the opportunities available.

The opportunities have been listed (alphabetically) under the activation areas outlined in Section 5.



### Working better together

#### Ensure tourism industry operators are represented on the TAG

##### How to activate (actions)

- Develop a revised charter for the TAG to incorporate the need for tourism industry representation and that the TAG is a forward-looking group
- Develop an EOI to ensure the most strategic-minded operators are able to be selected for the TAG
- Distribute charter and EOI and ask selected 6-8 strategic-minded operators to join the TAG
- Introduce a TAG code of conduct to allow for effective dialogue and to avoid conflict of interest scenarios
- Ensure the TAG has the ability to second specialist advice as and when required from outside of the region

##### Measures

- Quarterly network sessions commence and there is attendance by industry operators
- The TAG is restructured and incorporates at least 6 tourism operators (4 being from within Karratha)
- The TAG has a representative on Australia's North West board
- The TAG begins to activate the game changers identified in this DMP

##### Market to focus on

- Tourism industry operators

Currently, there is no formal local tourism organisation (LTO) which operates within Karratha. Rather, there is a Tourism Advisory Group (TAG) which was established in 2014. The current TAG primarily comprises Council personnel, Councillors, the VC as well as other government agencies.

Many of the initiatives in this DMP require industry collaboration and investment to achieve activation. As the TAG will be the primary group charged with pursuing activation of the opportunities identified, there is a need to ensure that there is tourism industry representation on the TAG.

If suitable tourism industry representation for the TAG is not able to be found from within Karratha, the potential exists to invite external representation to be on the TAG. This would be focused on high-quality tourism industry operator(s) from areas outside of Karratha who have extensive experience in the sector, run successful operations and who would provide valuable learning lessons for Karratha. The TAG may need to consider covering the travel costs of possible non-Karratha TAG members.

Council has a clear role to play with the TAG which needs to include:

- Managing the secretariat for the TAG;
- Working with industry representatives to determine the TAG agenda and areas to focus on;
- Using this DMP as the basis for the TAG agenda and the prioritisation of tasks;
- Discussing what tourism projects Council may need to offer seed funding for if priorities as set out in this DMP;
- Identifying which Government agencies Council needs to be actively engaging with at a state and Federal level to garner greater support for specific projects, to identify where funding grants exist and to access these where ever possible and where needed.

Going forward, the TAG needs to focus on activating the major game changers identified in this DMP. It needs to be a forward-looking group, rather than focusing on historical challenges. For Karratha's visitor economy to grow, all stakeholders involved in the tourism sector need to realise that it is the *sum of Karratha's parts which present the valuable destination proposition, not the individual parts themselves.*

## Industry networking and information sessions

### How to activate (actions)

- Organise quarterly drinks with tourism industry operators, hosted at different tourism businesses throughout Karratha
- Investigate potential to have guest speakers from successful tourism operations and destinations from within and outside of Karratha

### Measures

- Quarterly networking sessions commence
- Industry participation and engagement networking and information sessions
- Sessions are hosted at different locations each quarter

### Market to focus on

- Tourism industry operators

Currently, there is limited coordinated collaboration amongst industry operators within the tourism sector<sup>51</sup>. This is not uncommon, with Australia's tourism industry overall traditionally being highly fragmented. There are many reasons for this, however, the primary reason is that the sector largely comprises small to medium enterprises (SMEs) who are busy working "in the business" and have limited time to proactively engage in collaboration.

For Karratha to achieve its growth potential, however, will require a stronger, more collaborative industry. While collaboration often occurs organically between industry players, the opportunity exists to set up quarterly industry networking events for Karratha. The sessions could potentially allow:

- Council to provide industry with an update on the state of the sector;
- industry to discuss with Council any issues they are facing collectively as an industry (rather than focusing on issues individual operators are experiencing);
- industry to network and get to know other operators in the sector; and
- Council and industry to discuss updates and the progress of implementing the activations identified in this DMP.

<sup>51</sup> We note that some informal collaboration is occurring, however, potential exists to grow this collaboration.

The sessions could potentially be hosted at different businesses throughout Karratha to increase awareness of the product available.

Council has an important role to play in:

- Providing market data and updates to support industry understanding and improve knowledge;
- To make sure that industry plays a more active constructive role; and
- To make sure that timely and accurate market intelligence is gathered and disseminated to all key stakeholders.

## Greater Collaboration with Major Landowners and Managers

### How to activate (actions)

- Organise regular meetings with key state government agencies such as DBCA, to discuss ways to allow sustainable tourism ventures to access sites throughout Karratha
- Investigate potential to facilitate a tourism development forum to encourage greater dialogue between key state government agencies, tourism operators and investors, and other local stakeholders within and outside of Karratha
- Organise regular meetings with major resource sector companies such as Woodside, Rio Tinto etc., to discuss ways to allow sustainable tourism ventures to access sites throughout Karratha

### Measures

- Quarterly sessions commence
- Stakeholder participation and engagement by Council
- An annual tourism development forum is convened

### Market to focus on

- Key major landowners and land managers and industry operators

Industry feedback indicates concern at the inability to gain access to many areas including islands within the Dampier Archipelago, and many coastal locations as well as the fringes of national parks to allow for low impact, small-scale eco-tourism ventures such as glamping tent camps etc.

Greater discussion with key major landowners and land managers will hopefully lead to the identification of sites where carefully planned tourism ventures can operate from. The current perception of a blanket ban on tourism use in many of these areas is thought to have led to limited investor interest in general.

Council has a critical role to play to try and:

- Build a strong relationship with key land owning-managing state and federal government agencies;
- Build a strong relationship with key land owning-managing mining and resource companies;
- Working with landowners/managers to identify sites where tourism ventures could be encouraged and activated;
- Developing potential leasing terms of engagement for operators and investors to ensure that realistic and workable terms are possible including access to sites, how sites are monitored for impacts, types of facilities and sustainability provisions etc. and
- Identify potential tourism operators and investors to link to sites identified to help reduce project risk including excessive time delays in getting approvals.

Councils role may, therefore, need to be brokering relationships between quality professional operators and major landowners/managers as, without Council involvement, the project risk for most tourism operators and investors is likely to be too great.

## Industry training and upskilling

### How to activate (actions)

- Continue to build clarity around stakeholder responsibilities (public and private sector stakeholders)
- Work with the Tourism WA and Australia's North West, and particularly the Tourism Council of WA<sup>52</sup>, to leverage off their industry training programs and resources
- Identify existing training programs for potential customisation
- Rollout training programs to industry
- Develop criteria (agreed by industry) which outlines how operators can be listed on the new Karratha destination website (being developed as part of Karratha's place branding strategy) and ensure training programs offered cater to this criteria
- Work with industry operators who are already organically partnering and foster/grow these relationships

### Measures

- Far greater collaboration is occurring within the sector
- Industry participation and engagement with training events
- 95% or more of Karratha's tourism operators are ATDW listed and listings stay up-to-date
- Bookable product packages are available incorporating elements such as accommodation, F&B, experiences and/or transport
- Karratha has export-ready tourism product available for Tourism WA to market
- Karratha's tourism industry shifts from primarily a lifestyle one to a commercial tourism industry where operators can run the tourism component of their business as a full-time operation

### Market to focus on

- Tourism industry operators

The vast majority of operators in the tourism sector in Karratha generally are smaller operators. There is a need to offer upskilling and business development programs for these micro to small operators.

The types of support required are likely to include (but not be limited to):

- programs focused on social media and how to correctly utilise the various social media tools available (including what tool is best for specific types of marketing);
- assistance in storytelling and experience development;
- help in clustering and bundling experiences to make itineraries interesting and appealing;
- understanding how to value-add to existing product;
- providing the opportunity to network along the value chain to develop relationships with other suppliers.
- training on the ATDW to ensure that Karratha's tourism product is listed on the appropriate state and national tourism websites;
- customer service upskilling; and
- programs on understanding the difference between start-up, market ready, accredited and export-ready tourism product.

The Tourism Council of WA delivers a range of training programs throughout WA which could be leveraged. "These workshops are short, practical and relevant to the tourism industry and are suitable to both frontline staff and managers"<sup>53</sup>.

<sup>52</sup> <http://www.tourismcouncilwa.com.au/training-workshops>

<sup>53</sup> Ibid

## 2

## Growing demand through development & investment

### Branded, higher-quality hotel property

#### How to activate (actions)

- Continue to work with the current developer(s)
- Ensure the planning approval process is streamlined where possible
- Ensure wider tourism industry (major industry associations such as AHA, TAA, TTF etc.) and wholesalers, inbound tour operators and other intermediaries are kept fully aware of its development so market awareness is grown early on

#### Measures

- New accommodation property has a soft opening by 2022/2023
- Visitation to Karratha grows, along with yield generated
- Profile of Karratha grows because of marketing activities of a major internationally branded hotel
- Growth in interstate and international visitation especially

#### Market to focus on

- Supply-side: hotel investors
- Demand-side: family market, higher yielding conference/event market, VFR market, international visitors, special interest groups

Council has already been working with a major developer to introduce a high-quality, branded hotel property in Karratha's CBD. As part of the arrangement currently being discussed, Council has proposed a fit-out contribution of up to \$10m which would be recovered through lease payments over 30 years.<sup>54</sup> Council's contribution is to minimise the project's risk and is in line with other investments Council has made to enable projects to proceed such as the Qantas Club lounge and F&B offering at Karratha Airport<sup>55</sup>.

Government providing investment in tourism projects is not a new concept. There are examples across Australia, and particularly, within the Northern Territory where the NT Government developed five-star hotels in Darwin, Alice Springs as well as at Uluru. This was done because of market failure and the investment would not have occurred if not for the initial Government investment. These hotels were leased out and ultimately sold to investors.

Research completed for this DMP, including site visits to various properties, identified that the lack of a higher quality accommodation product is seen as a barrier to growing new higher yielding markets for Karratha. The vast majority of existing accommodation product is of mid-range variable quality, often does not meet the quality rating being marketed at and has had little reinvestment over some time. Additionally, the product on offer mixes leisure visitors and mining, which struggle to be compatible.

Without an improved and higher-quality accommodation offer, Karratha will continue to struggle to attract a higher yielding market including: domestic interstate holiday market; specialist interest leisure market; or an international visitor market. The development of a higher quality accommodation product will be an important catalyst for attracting these markets.

<sup>54</sup> The Quarter Hotel Business Plan May 2018, Karratha Council

<sup>55</sup> <https://karratha.wa.gov.au/sites/default/files/uploads/The%20Quarter%20Hotel%20Business%20Plan%20-%20FAQ.pdf>

Unless Council is prepared to incentivise the development, the risk is that Karratha receives another lower to mid-range accommodation product (because of the lower capital cost and reduced investor risk). Karratha needs to pro-actively drive new, higher yielding visitor markets to generate a stronger and more sustainable visitor economy.

As part of Council's investment into the accommodation property, a number of conditions should be tagged to the investment including:

- ensuring that the brand the hotel is marketed under is a higher-quality, internationally recognised brand;
- investigating whether unique elements could be offered such as a rooftop bar; and
- ensuring that the property is very well designed and maintained to attract an international and interstate leisure and business market.

## Council incentivisation to encourage private investment

### How to activate (actions)

- Develop criteria (checklist) which assist Council in determining which projects are game changers that will contribute significantly to Karratha's visitor economy and which warrant incentivisation
- Workshop criteria with Council personnel to discuss the checklist and the different forms of incentives which could be potentially offered (but not guaranteed) for game changer initiatives
- From this, develop an investment incentivisation framework which demonstrates to investors that Council is open for business and willing to work alongside on specific types of projects only
- Incorporate the gamechanger checklist and incentivisation framework in the updated investment memorandum (recommended as part of this DMP)

### Measures

- Private sector investment interest in Karratha increases and investment begins to occur
- Over time, Council can reduce the incentives it needs to provide to encourage investment

### Market to focus on

- Investment community in Sydney, Melbourne, Singapore especially

As identified earlier, while Karratha has produced a number of tourism-related strategies, including a Tourism Venture Prospectus, little private investment has occurred to date. Possible reasons for this include: tight restrictions on access to land for tourism development from landowners/managers such as DBCA and mining companies; the higher-risk nature of investing in a more remote location; the historic underinvestment which has occurred in Karratha's tourism sector etc.

To encourage private investment in regional areas elsewhere, government at all levels tends to have to "tilt the playing field". This is done through various mechanisms such as:

- contributing to the capital cost of major accommodation and attraction projects to assist with project risk minimisation (for example, the NT Government have contributed up to 20% of the capital cost of major tourism game changers<sup>56</sup>);
- streamlining and reducing the timeframe for the approval process for major game changer projects to demonstrate that Council is really "open for business"; and
- offering land at a peppercorn rental rate for a set number of years to reduce project risk.

<sup>56</sup> In the NT this has included major hotels and resorts in Uluru, Kakadu and in Darwin where Government has needed to be a significant investor to help reduce project risk

## Dampier Marina as a hub for water-based recreation

### How to activate (actions)

- Consider value adds to ensure the marina development has sufficient commercial tourism elements included
- Continue to apply for grants to help activate the development
- Continue working with the Hampton Harbour Boat and Sailing Club to progress development

### Measures

- Grant applications are successful
- Marina development occurs
- Growth in the number of visitors participating in marine/coastal experiences
- Growth in visiting yachts etc and charters

### Market to focus on

- Supply-side: Sailing club, marine-based operators (tourism and other) in Karratha, mining companies
- Demand-side: Locals, nature-based visitors, anglers, family market, VFR, international visitors

The Dampier Marina concept, which in 2017 was costed at \$15m<sup>57</sup>, involves:

- extending the existing seawall west (approximately 90 m) and slightly south to form a breakwater providing calm waters within the marina;
- the reclamation of approximately 2000m<sup>2</sup> of offshore area will need to allow for suitable carpark and hardstand facilities to support the marina;
- floating platforms supported by pontoons and held in place by pilings embedded in the seafloor;
- a total of 97 berths are proposed, 57 of which will accommodate vessels up to 12 m, 17 berths for vessels up to 15 m, and 14 berths for vessels up to 18 m; and
- a common user launch and recovery jetty is located adjacent to the carpark.

We understand that grant funding applications have been developed but there is no confirmation of full funding for the project yet.

As outlined in Section 4, while Karratha has a stunning aquatic natural environment, there is little opportunity for visitors to interact with the water unless they have their own (or access to a friend's) vessel. The Marina could, therefore, help position Dampier as a hub for marine and aquatic activity not only for the local market but for a visitor market. The marina could be a base for commercial water-based tourism operators including:

- charter/game fishing;
- water-based activity hire such as SUPs, kayaks and small boats;
- provisioning of vessels;
- a base for liveaboard fishing and diving operations; and
- whale watching.

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<sup>57</sup> <https://karratha.wa.gov.au/blog/dampier-marina-project-progresses>

## Visits by Explorer Cruise ships to Port of Dampier

### How to activate (actions)

- Contact with major explorer cruise ship operators to test level of interest
- Ensuring the Dampier cargo wharf has the ability and capacity to support day visits
- Liaising with other major cruise ship ports on the west coast including Freemantle, Exmouth and Broome
- Ensuring Pilbara Ports Authority are keen to champion the opportunity to help progress development
- Ensuring there is differentiated tourism product to avoid duplicating Exmouth visitor experiences

### Measures

- Meetings are held with explorer cruise ship operators (Virtuoso Voyages, Oceania Cruises, Astor etc.)
- Ongoing checking of wharf facilities and capabilities at Dampier for potential cruise ship visits
- Expansion of tourism product to ensure there is sufficient commissionable product to entice cruise operators
- Ongoing growth in visits to the west coast of explorer cruise ships

### Market to focus on

- High net worth international cruise visitors looking for exotic wildlife and cultural experiences
- Those markets specified by cruise ship operators as likely to be interested in a visit to the region,

Information provided by the Pilbara Port Authority indicates that the Dampier cargo wharf:

- Has capability for vessels up to 180 meters
- Maximum displacement of 35,000 tonnes; and
- Static under keel clearance of 1.0 metres.

Whilst there is understood to be capacity at Dampier for explorer sized cruise ships, the current range and number of commissionable products in the region is still relatively small. The ability, therefore, to attract the smaller scale cruise ship market is constrained until such time that sufficient tourism product is available in the region.

Developing new commissionable tourism product is therefore a key requirement if this sector of the visitor market is to be attracted and grown.

As an interim step, however, it may be prudent to investigate the potential for non-mooring cruise ship visits with smaller sized explorer vessels often having the capability to launch zodiacs (inflatables) from explorer vessels to deliver guests and guides to reefs, islands and other interesting locations. This obviates the need to tie up at wharves and offers greater flexibility in accessing coastal locations especially. Rubber zodiacs/inflatables are often able to access more difficult locations to navigate in larger vessels. Potential may exist to visit sites within the Dampier Archipelago if they are deemed to offer unique and highly interesting sites of cultural value, environmental or historic importance.

## Night Time Dining Activation

### How to activate (actions)

- by way of example, investigate a concept such as Dinner on the Rocks, to test viability and to try and activate night time outdoor unique dining options.
- Undertake research on similar experiences in Australia and internationally to determine best practice elements which could be included as part of the dinner experience
- Undertake feasibility study on the concept to determine viability, whether it should operate on a staged basis (pop-up, seasonally or full-time) and the preferred sites for the experience
- If viable, undertake discussions with catering and F&B companies and commercial accommodation operators in Karratha and further afield to gauge interest. This should also include discussions with Karratha's indigenous community.

### Measures

- The feasibility study is completed
- If viable, experience starts operating by 2021
- Participation in the experience increases
- Higher yield is generated from visitors to Karratha
- Experience is featured by Tourism WA as a unique WA experience
- Leading chefs are invited to create signature dishes
- Strong media coverage is generated

### Market to focus on

- Supply-side: Higher-quality food and beverage operators and caterers and Karratha's Aboriginal community
- Demand-side: "foodies", the family market, VFR market, locals, nature-based visitors, food competitions

Karratha's warm climate presents the opportunity to introduce more evening activities in Karratha to attract not only a visitor market but also to introduce more things for locals to experience. A food tourism experience would appear to offer an opportunity for Karratha.

Importantly, this is not suggesting that a permanent structure is established in an outdoor unique environment. It may only require a simple platform to allow for the setting up of tables etc. but which are removed each evening. Council would need to ensure that access to sites were sufficiently well lit and that pathways were safe to use. In addition, if there was a need for a simple wooden platform to be constructed to allow for tables etc. to be placed "on the rocks", Council would need to ensure it complied with appropriate building standards. But ideally, no platform would be required, so what is offered is a more rustic experience without the need for infrastructure.

The food tourism (or gastronomy tourism) sector has experienced major growth and is classified by the World Tourism Organisation as one of the fastest growing tourism sectors globally<sup>58</sup>. The sector has "birthed enormous creativity and opportunity for travel and food businesses across Australia"<sup>59</sup> and Tourism Australia has identified that "participating in memorable food and drink experiences [is] a prime motivator for travel"<sup>60</sup> for visitors. Additionally, food tourism provides a valuable platform for the promotion of cultures through cuisine.

As per the audit completed for this DMP (see section 3.5.1), Karratha does not currently have a unique food/beverage experience<sup>61</sup>. The opportunity exists for Karratha to fill this gap in its product mix and capitalise on the strong growth in the food tourism sector through offering an outdoor dining experience in Karratha which

<sup>58</sup> Second Global Report on Gastronomy, UN World Tourism Organisation, [http://cf.cdn.unwto.org/sites/all/files/pdf/gastronomy\\_report\\_web.pdf](http://cf.cdn.unwto.org/sites/all/files/pdf/gastronomy_report_web.pdf)

<sup>59</sup> <https://karryon.com.au/industry-news/product-and-retail/destination-food/>

<sup>60</sup> Ibid

<sup>61</sup> Note, this category covers unique F&B experiences such as winery trails and tours, microbreweries, cooking schools, dining in unique locations etc. It does not refer to an area's general F&B offer.

leverages off Karratha’s 5-star natural environment. Figure 25 demonstrates some best practice dinner under the star experiences which are offered elsewhere to reflect these are proven as highly marketable.

To test the viability of the experience, it could first be offered on a seasonal basis during periods where Karratha has a greater number of events and an influx of visitors.

The potential also exists to:

- liaise with the Aboriginal community in Karratha to see if there is interest in partnering to deliver a storytelling and/or night sky viewing component to the experience; and
- investigating incorporating a cooking school element as a value-add.

**Figure 25: Outdoor dining experiences**



**Sounds of Silence Outdoor dining experience at Uluru**



**Mwamba Bush Camp, Zambia**



**Savanna Private Game Reserve, South Africa**



**JW Marriott Mussoorie**

## Higher-Quality Destination Holiday Park

### How to activate (actions)

- Undertake strategic land use planning to identify potential sites for the higher-quality destination holiday park
- Incorporate investment opportunity into the Karratha tourism investment memorandum
- Produce a shorter version focused specifically on this opportunity to take to the Caravan Industry Association of WA and the Caravan Industry Association of Australia
- Based on contacts provided by the associations, initiate discussion with major destination holiday park operators to showcase the opportunity and to understand what the market is looking for to encourage investment
- Identify potential investment partners
- Explore potential PPP models and incentives to attract investment

### Measures

- Discussions are held with the two associations as well as major destination holiday park investors and operators
- Major destination holiday park investors and operators attend the investment forums held in Sydney, Melbourne and Perth
- A major branded destination holiday park is developed in Karratha

### Market to focus on

- Supply-side: investment community and holiday park investors specifically
- Demand-side: family market, VFR market, sporting and education groups

Karratha, and the broader Pilbara, currently has an undersupply of true destination holiday parks. This is an issue which is evident nation-wide (based on discussions with major operators and caravan and camping associations) and the primary issue is the lack of available and appropriately zoned land to allow for these to be established. While Karratha does have three holiday parks, Stafford's observations of these properties indicate that they are aligned more closely with traditional caravan parks, rather than true destination holiday parks.

A higher-quality destination holiday park has the potential to drive far stronger visitation to Karratha, noting that users of such facilities include a wide range of visitors such as: traditional holidaymakers; attendees of major events and festivals; visitors wanting to travel with pets; business and conference attendees using cabins and chalets especially; school groups and those on education programs; and those visiting friends and relatives.

Figure 26 shows images of some of the higher-quality/signature destination holiday parks. These parks tend to: be operated by major operators (including Discovery Parks, NRMA, Big 4 and Ingenia, by way of example); offer a mix of facilities to guests such as: high-quality aquatic water-play parks, kids clubs, mini-golf and shops etc. as well as a range of accommodation options from high-quality eco-cabins to RV and camping sites.

Importantly, destination holiday parks are focused on visitor markets only, rather than providing permanent accommodation. The needs of a permanent resident market differ significantly from visitor market's so these uses are not considered complementary.

Council has a role to:

- identify sites for quality destination holiday parks;
- create an investment memorandum which includes details of what can be offered for one or more destination holiday parks;
- facilitate presentations to major destination holiday park companies throughout Australia and based mostly in Sydney and Melbourne; and

- identify planning approval mechanisms to help any appropriately skilled operators and investors avoid lengthy approval delays.

**Figure 26: Destination holiday park examples**



**Deniliquin Holiday Park, NSW**



**Cairns Coconut BIG 4 Holiday Resort, QLD**



**BIG4 Renmark Riverfront Holiday Park, SA**



**Port Fairy Holiday Park, VIC**

The introduction of a higher-quality destination holiday park in Karratha would capitalise on the significant growth in the destination holiday park sector from:

- a demand-side perspective, as more visitors are looking for family-friendly, destination-style accommodation; and
- a supply-side perspective as major branded operators are looking to establish new destination holiday parks for their portfolios.

From discussions with major operators, the following provides a basic list of criteria for destination holiday parks:

- a land area of 8 ha. or greater (able to be leased ideally for a minimum of 50 years + or purchased);
- capacity for 200+ powered sites, and 25-30 cabins/chalets;
- a focus on visitors rather than permanent residents; and
- easy access to major roads and highways.

In addition to developing a destination holiday park, Karratha's strategic location between Broome and Exmouth, its airport and its good quality freeway infrastructure, the potential exists to investigate introducing an RV and caravan service centre and storage facility as part of a cluster. This could include: a mechanical servicing facility for RVs and caravans; a rental centre for those looking to hire an RV or caravan; and a storage facility providing RV and caravan owners with a safe place to store their RVs/caravans and have them serviced as required.

To showcase this destination holiday park and potential associated service centre investment opportunity, it is recommended that (in addition to including it within Karratha's tourism investment memorandum) Council and the TAG facilitate discussions with the Caravan Industry Association of WA and the Caravan Industry Association of Australia who will be able to assist in identifying key contacts in the destination holiday park sector.

## Investment memorandum and facilitation of investment forums

### How to activate (actions)

- Tourism investment memorandum crafted by a specialist who understands what the investment community is after
- Tourism investment forums are organised for Sydney, Melbourne and Perth with major tourism investors and associations invited
- Tourism investment forums are marketed through various national tourism association information platforms such as TTF, TAA, AHA etc.
- Tourism investment memorandum is professionally printed and distributed at tourism investment forums and online as indicated above

### Measures

- Tourism investment memorandum is produced by Council
- A spokesperson/champion for Karratha is commissioned (which could be Council and with industry support)
- Investment forums are held with at least 20% attendance rate of invitees
- Private sector investment interest in Karratha increases and investment begins to occur in Karratha

### Market to focus on

- Investment community and tourism industry operators

As indicated previously, while Karratha has previously developed a Tourism Venture Prospectus, there is a need for a far more comprehensive and proactive approach to be taken. An updated tourism investment memorandum should be developed which:

- focuses on the commercial opportunities identified in this DMP which Council wishes to encourage, but which they are not guaranteeing;
- outlines what incentives Council and potentially State Government (through grant programs) are able to offer;
- defines Council's game changer criteria checklist;
- provides an overview of potential sites which are appropriately zoned for tourism development so delays in activation can be avoided;
- demonstrates the size of Karratha's visitor market (it is the largest in Australia's North West region when all source markets are taken into account and the second largest after Broome for holiday visitation) as well as projections based on the game changers; and
- demonstrates that Karratha has a coordinated, rather than fragmented, approach to tourism and encouraging investment.

Once the investment memorandum is developed, Council and the TAG should coordinate three investment forums to showcase Karratha and the various investment opportunities. It is important that a champion is found to present at the forums - someone from the tourism industry in either Karratha, the Pilbara or broader Australia's North West region, who has extensive experience and can act as a high-energy advocate for Karratha. These forums should be held in major markets including Sydney, Melbourne and Perth with the potential to extend to Singapore.

Council's role is to:

- create the investment memorandum of priority projects;
- determine what form of financial or development incentive (if any) Council may need to offer to help reduce project risk and to support timely investment;
- organise two investment forums (in Sydney and Melbourne) either directly or through an intermediary; and
- encourage major destination holiday park investors and operators to visit Karratha to assess the sites Council has identified.

## Island glamping facility (and nature-based camping)

### How to activate (actions)

- Revise initial feasibility study or create a new one if required, in partnership with Murujuga Aboriginal Corporation
- Distribute feasibility study to existing glamping operators in Australia (as part of the investment forum or separately)
- Work with DBCA (as the land manager) to find ways to mitigate environmental concerns and to agree on a pathway forward

### Measures

- Island glamping investment is secured and development takes place
- Bookings for the glamping facility grow
- Experience is profiled by Australia's North West and/or Tourism WA and potentially Tourism Australia

### Market to focus on

- Supply-side: highly experienced glamping investors and operators
- Demand-side: family market, nature-based visitors, locals, international visitors

The concept of island accommodation has been included in various tourism strategies for Karratha. More recently, the Tourism Ventures Feasibility identified the potential for luxury glamping and eco-camping accommodation, and, the subsequent Tourism Ventures Prospectus focused on the eco-camping concept. To date, no investment has been secured from the private sector for this project.

To stimulate investment, we consider the concept needs to be revised, offering a lower capital cost for the project. As the glamping industry has grown, the supply of glamping tent options has also increased. Pre-packaged glamping tents can now be purchased for approximately \$50k per tent. If a similar item was able to be sourced for Karratha, we would recommend investigating including 10-12 glamping tents, along with a pre-fabricated central service centre (estimated at \$450k). The glamping tents could be introduced on a staged basis (possibly 6 at first), and, as demand warrants it, the number of glamping tents could be grown.

Anecdotal feedback from industry sources and other stakeholders indicates a lack of clarity as to why DBCA has objected to low impact, small scale eco style island development previously. This should be discussed with DBCA by Council to identify the actual technical reasons which DBCA have concerns about.

## Karratha Airport as a light aircraft recreation hub

### How to activate (actions)

- Work with Karratha Airport to ascertain any constraints
- If supported, undertake a feasibility study to determine potential market demand
- Liaise with WA and national aero clubs, gliding clubs, aero acrobatic clubs and, paragliding and other aviation associations

### Measures

- The feasibility study indicates viability
- Light aircraft events and interest is generated
- Potential investment in an aviation business park to support light aircraft and aviation recreational pursuits is developed
- The experiences are profiled by Australia's North West and/or Tourism WA with a mixture of managed events and other aviation recreational pursuits

### Market to focus on

- Supply-side: aviation operators, investors, event coordinators, aviation training companies
- Demand-side: light aircraft owners, adventure visitors, clubs and associations

Potential may exist to consider positioning Karratha Airport as a hub for light aircraft and recreational flying, rather than being focused only on standard commercial aviation activity. There is a growing demand for new light aircraft hubs which can cater to the needs of a fly-in market needing places to land and store aircraft, for maintenance of light aircraft and for long-term hangars etc.

The light aircraft hub could be positioned as WA's hub for gliding, aircraft acrobatics and light aircraft flight training and could also be a base for light aircraft acrobatic competitions.

## Murujuga Living Knowledge Centre Enhancements

### How to activate (actions)

- Investigate enhancements to the Murujuga Living Knowledge Centre (including those noted in this DMP) to strengthen the ongoing sustainability of the Centre and wide market appeal
- Work with the potential tour operator to build up capacity to ensure Aboriginal tours can be offered on a regular and extended basis

### Measures

- Full funding for the Centre is acquired
- The Centre is constructed and profiled by Tourism WA as a key Aboriginal tourism experience in WA
- Tours from the hub are offered on a consistent basis

### Market to focus on

- Demand-side: cultural and heritage visitors, nature-based visitors, family market, VFR, locals, grey nomads

The Murujuga Living Knowledge Centre is a project proposed by Murujuga Aboriginal Corporation to develop a Living Knowledge Centre, camping facilities (and offering a Camping with Custodians program<sup>62</sup>) and associated tourism services in the Murujuga National Park on the Burrup Peninsula. A location for the Centre in Conzinc Bay has already been assessed as suitable for the development and a site plan has been created.

The total cost of the development covering access road and tracks, utilities and facilities development is estimated at \$25 million. Confirmed funding to date is \$12 million under the Burrup and Maitland Industrial Estates Agreement (BMIA) and Woodside's Conservation Agreement with the Australian Government.<sup>63</sup>

While Karratha's Aboriginal history presents an opportunity to be leveraged, there are a number of enhancements to the concept which could also be considered to ensure the longer-term sustainability of the project. There are too many examples nation-wide of cultural centres which, while well-intended, have become "white elephants". We want to avoid this scenario for Karratha.

The following are points to note based on research and experience within the cultural tourism sector in Australia and with Māori groups in New Zealand.

- Indigenous cultural centres Australia-wide are not profit centres, they generally run at a loss requiring significant investment from government at various levels. There is no evidence Australia-wide of a cultural centre which is commercially viable.
- Māori groups in NZ have been successful tourism entrepreneurs. There is recognition, however, that the market has moved from one which enjoyed a cultural dance show and dinner (though there is still a proportion of the tour market who seek this) to one after a more authentic and experiential product. The majority of new Māori cultural tourism product being developed in NZ are focused on experiences such as kayaking tours, cycling tours, walking tours, cooking schools etc. with a quality Māori cultural overlay. The Māori overlay, therefore, comprises a part, but not all, of the experience.
- Whale Watch Kaikoura - one of NZ's most popular tourist attractions - is an example of this. While initially, the concept involved a Māori cultural experience being part of the drawcard, the experience is now focused on the hero experience being the whale watching and a lighter Māori overlay is provided.

<sup>62</sup> Camping with Custodians is the experience of camping on Western Australian Aboriginal lands and having the opportunity for interaction between Aboriginal people and campers, enabling the visitor to learn about lifestyle, history, heritage and culture of West Australian Aboriginal people.

<sup>63</sup> Murujuga LKC Business Case Draft Report July 2017

- The majority of demand for cultural experiences stems from the international market<sup>64</sup>. One cultural experience is usually enough to satisfy a local domestic market. The sustainability of an experience/attraction is therefore reliant on the international visitor market.
- Participation levels of Aboriginal experiences in WA, as advised by Tourism WA, remain low (at 21% in 2016-17), and have declined 5% in five years.<sup>65</sup> However, visitor interest in undertaking an experience is much higher, at 78%. This indicates that either:
  - the current Aboriginal experiences on offer are not what the market is after in terms of an Aboriginal cultural experience;
  - that the product is not available; or
  - that although the market is indicating interest, the likelihood of converting this into actual participation is small.

Based on our research and experience in the sector, and the current concept put forward for the Living Knowledge Centre, we consider there is a need to enhance the concept by:

- co-developing the Centre with a facility which has an eco-activity focus, such as island cultural site viewing, kayaking, whale watching (seasonally), traditional fishing techniques etc;
- offering paid guided tours which are of a constant standard and working with the operator of these to build up capacity for more than one guide (should someone be unavailable); and
- integrate other historic components such as the early pearl diving industry so a strong social history narrative can be weaved in where local Aborigines see this as appropriate.

## Cossack Cultural Accommodation Facility

### How to activate (actions)

- undertake a feasibility study to determine the viability of establishing a rustic authentic camping and cabin experience to compliment the heritage significance of Cossack and its existing restored buildings
- with the guidance of the 2014 Cossack Visioning Report, identify the areas for potential forms of camping or cabin style accommodation noting the heritage significance of the site and limitations
- if shown to be viable, identify parties to develop and operate the site, noting it may need to be only operational for part of the year due to seasonality impacts.
- Distribute feasibility study to existing camping/glamping operators in Australia (as part of the investment forum or separately)
- Work with relevant government agencies to help find ways to mitigate heritage and environmental concerns and to agree on a pathway forward

### Measures

- Camping and cabin investment is secured and development takes place
- Bookings for facility grow
- Experience is profiled by Australia's North West and/or Tourism WA and potentially Tourism Australia
- Other visitor economy activations for Cossack start to be investigated and introduced

### Market to focus on

- Supply-side: highly experienced camping/glamping investors and operators
- Demand-side: family market, cultural based visitors, locals, international visitors

<sup>64</sup> [https://www.tourism.wa.gov.au/About%20Us/Documents/2016%2017%20VEER%20Report\\_FINAL\\_22.02.2018.pdf](https://www.tourism.wa.gov.au/About%20Us/Documents/2016%2017%20VEER%20Report_FINAL_22.02.2018.pdf)

<sup>65</sup> [https://www.tourism.wa.gov.au/About%20Us/Documents/2016%2017%20VEER%20Report\\_FINAL\\_22.02.2018.pdf](https://www.tourism.wa.gov.au/About%20Us/Documents/2016%2017%20VEER%20Report_FINAL_22.02.2018.pdf)

The Cossack site currently offers a beautifully restored cultural heritage site but which remains static with limited potential to derive commercial return or offer commissionable product.

The concept of introducing commercial accommodation is well set out in the Cossack Visioning Report as an opportunity worthy of investigation. It is clear that significant government funding has been applied to restoring the stunning town buildings to a high standard and to offer a permanent reminder of life 150+ years ago in the region with pearling, farming, fishing industries etc.

The challenge for the site is primarily twofold:

- Firstly, it is a highly valued heritage and historic site which needs to be both preserved and conserved and which in turn, limits additional non heritage activity to be “ideally out of site”, as noted in the Visioning Report. The ability to use and activate the heritage buildings to help “bring them alive” is therefore restricted.
- Secondly, visitation to Cossack is constrained by both its more remote location, and by the high seasonal nature of tourism to the location. There is also no medium to large scale urban centre close by to leverage off. So introducing tourism product is financially risky as there is a very limited period to generate revenue from any commercial venture.

To stimulate investment, we consider the concept may need to be revised, offering a low capital cost for the project overall, and the ability to ideally introduce ways to bring some of the key heritage buildings alive through a possible sound and light show using the exterior of some buildings to project famous stories. Similar examples (of heritage story telling) can be found in various locations such as the Warrnambool Maritime Village on the Victorian Coast (Great Ocean Road) and “tales of the shipwreck coast” sound and light show which operates each night.

The introduction of a night time attraction would be needed to act as the anchor product, to stimulate a visitor market to want to stay over and camp or use heritage style cabins near the Cossack heritage buildings. We suspect without an anchor product (to act as the stimulus to attract day and night time visitors), commercial accommodation options would struggle to be commercially viable.

Warrnambool Museum and Sound and Light Show



## 3

## Diversifying and growing destination events

## Events to leverage natural assets such as a Big Red Fishing Competition

**How to activate (actions)**

- Undertake an audit of fishing competitions around WA to identify a unique point of difference and to understand requirements
- Undertake a business case for the event to determine viability, interest and operational models

**Measures**

- Event is developed
- Participation in the event continues to grow each year it is held
- The event is profiled by Tourism WA and/or Australia's North West
- Visitation to Karratha grows, particularly pre and post event and overall visitor yield increases
- The event attracts a visitor market as well as a local market

**Market to focus on**

- Supply-side: event operators
- Demand-side: anglers, locals, nature-based visitors, grey nomads

Much feedback about Karratha's strength as a destination focused on its extensive water assets and the high-quality fishing experiences which can be undertaken both offshore and onshore. Karratha also has one of the highest boat ownership rates per capita in Australia<sup>66</sup>.

The potential exists to leverage off this natural strength and develop a major fishing event. The event could focus on the colour red - which is not only part of the Red Dog brand but also leverages off Karratha's natural environment including red soil and the distinctive red colours in the landscape - and be potentially branded as the Big Red Fishing Competition. The concept could involve the largest off-shore catch of red emperor or similar. There could also be a parallel competition for land-based fishers or visitors.

<sup>66</sup> <https://karratha.wa.gov.au/sites/default/files/uploads/CK10311%20PROSPECTUS%20UPDATE%202015%20v2.pdf>

## Event toolkit

### How to activate (actions)

- Council develops an events toolkit, similar to the Wollongong Councils Events Toolkit (available free online), which actively demonstrates Karratha is “open for events”
- Events Toolkit is distributed to event promoters and other relevant stakeholders
- Events Toolkit is provided in an easy to download digital format

### Measures

- Downloads of the Toolkit increases
- The Toolkit is held out as a best practice initiative by a local council in WA
- Enquires regarding events in Karratha grows
- The number of events, which have a positive economic benefit, held in Karratha grows
- Karratha is positioned as an “event-friendly” Council area

### Market to focus on

- Supply-side: event operators and promoters

To grow the events sector in Karratha requires actively seeking out events and promoting to event organisers that the region is “open” for events. The opportunity exists to create a regional events toolkit which can be provided to event organisers which:

- demonstrates that each Council has a number of pre-approved event locations ready to go so that red tape for event organisers is minimal;
- has an overview of the pre-approved locations including their capacities, types of events they can support, the hours of operation permitted etc.;
- includes a simple summary of the events approval process as well as an overview of insurance required;
- has information on waste management required (based on the size of the event) as well as toilets;
- has a summary of applicable fees and how these are to be paid; and
- includes contact details for event management personnel at each Council.

Figure 27 provides some sample pages from the Wollongong City Council Events Toolkit which is considered a best practice example nation-wide of a proactive events promotion tool.

Figure 27: Wollongong Events Toolkit (sample pages only)<sup>67</sup>



<sup>67</sup> Available at: <http://www.wollongong.nsw.gov.au/city/events/toolkit/Documents/Events%20Toolkit.PDF>

## Light show leveraging off and showcasing Karratha's natural environment

### How to activate (actions)

- Complete benchmarking assessment of similar experiences elsewhere to ascertain best practice requirements and unique points of difference
- Complete business case which assesses the viability of the light show, including operational models and an economic impact assessment
- Align business case model with State and/or Federal grant funding programs

### Measures

- The business case is completed
- Grant funding for the light show is awarded and investment in infrastructure required occurs
- The light show commences operation, potentially on a staged basis from an event to a seasonal or more permanent experience
- Visitation to the event and to Karratha grows
- The event attracts a visitor market as well as a local market

### Market to focus on

- Demand-side: family market, VFR, locals, nature-based visitors, grey nomads

The success of major light shows around Australia (including Vivid which is held in Sydney and is internationally-renowned), demonstrates the pent-up demand for family-friendly experiences which can be undertaken in the evening and which are not centred around F&B or traditional cultural experiences.

The opportunity exists to develop a light show in Karratha to showcase the history of the area and its stunning natural environment. The light show could potentially be operated at first on a pop-up or seasonal as an event, and, as viability is proven, it could extend to a permanent experience.

The opportunity exists to investigate introducing a pop-up F&B (including food vans) at the same time as the light show which would assist in generating a longer length of stay.

## Major Destination Sports Event

### How to activate (actions)

- Investigate potential for major triathlon as a potential major sports event to encourage regional and national sports tourism interest, such as a Red Dog Triathlon Event.
- Undertake discussions with Triathlon Western Australia and/or Triathlon Australia to discuss requirements for such an event to qualify within their programs
- Undertake discussions with major mining companies and other corporates to ascertain interest
- Undertake business case for the event to determine viability, interest and operational models

### Measures

- Event is developed
- Participation in the event continues to grow each year it is held
- The event is profiled by Tourism WA and/or Australia's North West
- Visitation to Karratha grows, particularly pre and post event and overall visitor yield increases
- The event attracts a visitor market as well as a local market

### Market to focus on

- Supply-side: Event operators and promoters
- Demand-side: sport visitors, adventure visitors, nature-based visitors, corporate groups, locals

While Karratha has several community events, it does not yet have a major destination event which generates significant visitation from outside Karratha or which has been profiled by Tourism WA or Tourism Australia.

Given Karratha's unique natural landscape and its active community who enjoy recreational activities, the opportunity exists to introduce a major regional triathlon event. To position the triathlon as a unique event and to provide a "Karratha spin" to the event, it could be marketed as the Red Dog Triathlon, leveraging off the nationally-recognised Red Dog brand cachet. The triathlon could include a kayaking (or SUP'ing) element, a running leg and a mountain biking leg which could be through a disused mining area.

To grow participation and profile of the event, the opportunity may exist to:

- market the event as a corporate triathlon and encourage participation from major mining companies and corporate entities in Karratha and the broader Pilbara region; and
- include the introduction of different age range events so shorter distances for primary and high school kids etc.

Feedback from Council indicated that there has previously been some interest in developing a Karratha triathlon, though the concept was contingent on having international flights into Karratha. We consider this thinking is the wrong way around. The development of a major triathlon event will stimulate interest and greater demand which may, in conjunction with several other initiatives outlined in this DMP, support Karratha receiving international flights. Additionally, we consider the primary market for this event would likely be the domestic market, rather than the international market. The Gold Coast Marathon is a good example of an event that successfully attracted significant international competitors without having international flights into the Gold Coast during its developmental years.

## Red Earth Arts Precinct National Exhibition & Event Program

### How to activate (actions)

- A strategy is developed to continue to grow the Precinct's national touring programme
- Assessment is undertaken on additional initiatives which can be introduced to integrate the Precinct with the rest of the CBD
- Focus major events in off-peak months where possible
- Continue to encourage further collaboration and alignment across the public and private sector to deliver and promote major events at the Precinct

### Measures

- The Precinct continues to attract a growing program of national events and exhibitions
- Visitation to the Precinct continues to grow - including locals and visitors
- The Precinct becomes the "go to" event venue for surrounding areas including Exmouth, Port Headland, Broome etc.
- The Precinct is promoted widely throughout Australia's North West region

### Market to focus on

- Demand-side: arts and cultural visitors, locals, family market, VFR, grey nomads

The Red Earth Arts Precinct has provided Karratha with a high-quality, innovative, contemporary arts and community facility. The performing arts facility market is a competitive one. Regional facilities around Australia are competing in an environment typified by declining public funding. There is a need to have a strategy in place which actively positions the Red Earth Arts Precinct as a major regional and state facility and which actively encourages a national touring program.

There is also a need to introduce initiatives to continue to integrate the Arts Precinct with the rest of the CBD. This could be achieved by introducing the following.

- Introducing public art or sculpture trails around Karratha CBD so that creative activity is brought "out onto the streets" rather than being confined within the Red Earth Arts Precinct.
- Introducing art bike trails which could include a circuit itinerary, starting and ending up at the Red Earth Arts Precinct and travelling to sites of cultural significance or to the public art sites recommended above.
- Leveraging off Karratha's creative community by having public performance outside the Red Earth Arts Precinct as well as along main streets in Karratha and other key areas.
- Offering a range of nighttime activations of the surrounding precinct which encourage a broader family market to spend time in and around the Red Earth Arts Precinct and which may include artisan markets, smaller scale events and festivals. We note some of this activity is already organically occurring.
- Hosting photography tours which could focus on flora, fauna and the stunning natural landscapes which Karratha offers.

## 4

## Promoting Karratha as a vibrant destination

## Assessment of visitor information services

## How to activate (actions)

- Investigate relocating the existing VC to a site (potentially co-located) within the town centre to increase exposure of the VC
- Research on major visitor information trends nationally and internationally.
- Review (or complete in-house) visitor information services, looking at how visitor information services are currently provided in Karratha and potential models to: improve visitor reach; improve Council's (and the rate payer's) ROI; and align more closely with visitor information servicing trends.
- Invest in digitally focused visitor information services and social media channels to create reasons to do more in Karratha

## Measures

- Visitation to the VC increases
- Improved provision of visitor information services

## Markets to focus on

- All visitor markets

The nature of visitor information services is changing, driven by the strong growth of digital technology and media. The internet is the number one tool for accessing visitor information for all age groups now. The “internet age” is now being surpassed by the “mobile age”, and with it, visitors’ desire to access, download and upload information while on their trip is increasing.

Key findings from specific research<sup>68</sup> into visitor information services, and visitor information centres (VCs) specifically, highlights that:

- most VCs will continue to experience a decline in walk-in visitors as digital information improves and is used more widely across demographic groups;
- the cost to councils of delivering visitor information services through VCs is increasing, while VCs, at the same time, are experiencing a decrease in utilisation by visitors;
- most VCs struggle to have consolidated and up-to-date tourism product databases of all product available in their respective regions; and
- many VCs, especially in more rural/regional locations appear to service the local community rather than the visitor through offering community and council info, acting as a drop-in centre and a location for holding meetings.

National-based research recently released by Tourism and Events Queensland (Queensland’s state tourism body) demonstrates that nationally, only 4.4% of visitors in Australia actually use a VC on their trip.<sup>69</sup> Top line information demonstrates that while Karratha’s VC currently captures above the national average (9.2% of all visitors to the

<sup>68</sup> Conducted by Stafford over the last 20 years

<sup>69</sup> Queensland Visitor Information Centres, Snapshot of the year ending September 2017, Tourism and Events Queensland

LGA visit the VC)<sup>70</sup>, there is still a large proportion who do not. *The vexed question, therefore, is how is Karratha servicing the other 90.8% of visitors who are visiting each year?*

Given that visitors do not recognise local government boundaries, a regional review of visitor information services and the VC should be considered which takes into account current research and analyses future trends to ensure Karratha is achieving the best ROI for visitor information services. There are many new models being implemented in Australia and further afield which move away from the traditional “bricks and mortar” visitor information services to providing:

- mobile visitor information services throughout mobile kiosks (vans and trailers etc.) which can be relocated to where the visitors primarily are (such as for events or market days);
- roving ambassador programs which position well-experienced locals throughout a CBD or at major events to provide information as well as a personal and face-to-face interaction;
- automated information containers which open up during set hours and provide large multi-user touch screens;
- high-quality digital information platforms which provide cohesive and up-to-date information about a destination, including booking and packaging capabilities; and
- co-locating visitor information services with other facilities such as art galleries, museums and libraries.

## ATDW audit and listing

### How to activate (actions)

- Build on product and accommodation audit included in this DMP and complement with an on-the-ground audit (to ensure operators without a digital presence are identified)
- Crosscheck operators to check they are listed on the ATDW (<https://atdw.com.au/our-listings>)
- Hold workshops to explain the ATDW listing process to those operators who are not currently listed or whose listings are out of date

### Measures

- ATDW listed operators in Karratha grows
- Profile/exposure of Karratha on Australia’s North West and Tourism WA increases because the number of ATDW listed operators

### Market to focus on

- Tourism operators in Karratha

WA tourism operators receive a free listing on the ATDW, however, not all operators in Karratha appear to be listed on the database. There is a need to educate operators on the significant value and reach which is generated through having an ATDW listing, including that through a single listing, an operator’s details will then appear on Australia.com and over 50 other websites such as such as [about-australia.com.au](http://about-australia.com.au) and [planbooktravel.com.au](http://planbooktravel.com.au).

<sup>70</sup> Total estimated VC visitors in 2017 was 34,395. Total estimated visitation to Karratha in 2018 (3-year average to March 2018) was 373k. This equates to an approximate penetration of 9.2%.

## Local awareness and ambassador program

### How to activate (actions)

- Complete detailed economic impact assessment on the value of the visitor economy and publish this in infographic/an easy to read format
- Identify industry champions who can be featured as advocates for the tourism sector
- Distribute infographic to the local community via social media etc.
- Identify Karratha champions who can be leveraged for the Karratha proud campaign
- Develop the Karratha proud campaign to encourage Karratha's residents to be proud of where they live

### Measures

- Local awareness on the value of the visitor economy and its potential increases
- Local support for tourism grows

### Market to focus on

- Locals

There is a need to introduce a community pride campaign which encourages the host community (local residents) to be advocates for Karratha and which helps reverse the negative stereotypes about Karratha which is portrayed by the media, at times.

There also appears to be insufficient understanding of the important role the visitor economy plays in Karratha and why it needs strong support. There is a lack of awareness of how the tourism dollar spreads throughout the economy.

A local visitor economy awareness campaign should be developed to demonstrate:

- how the visitor dollar disperses through the local economy (the direct and indirect impact of visitor spend);
- what businesses benefit from tourism including cafés, retailers, service stations, bars and transport providers etc;
- how extended trading hours (even seasonally) can benefit the community;
- what the estimated value of tourism is via direct, indirect and induced spending impacts (this could be demonstrated in terms such as how many loaves of bread, cups of coffee and litres of fuel etc. are purchased by visitors on any given day); and
- why Council/ratepayer funding is required to maximise returns to Karratha's community via economic, social and infrastructure benefits.

## Product packaging

### How to activate (actions)

- Develop a series of suggested itineraries which can be profiled on the new destination website (being developed as part of Karratha's place branding strategy) and which include a mix of paid and free product
- Feature suggested itineraries on the destination website
- Once the TAG is restructured and networking sessions are occurring, run a product packaging "speed dating" forum to identify those who would be interested in having their product included in a bookable package which could be marketed as the "Best of Karratha" or similar
- Launch bookable packages and incorporate on the new destination website
- As new product is introduced, develop additional packages where possible

### Measures

- Industry collaboration is occurring
- Booking on the packages grows
- Stronger visitation and yield
- Stronger profiling by Australia's North West and Tourism WA

### Market to focus on

- Supply-side: industry
- Demand-side: short break market, family market, grey nomads

Operators within the tourism sector should be encouraged to package product available within and outside Karratha. The visitor market is competitive and sophisticated. Visitors will want to be able to undertake a range of experiences easily when travelling. Navigating the destination should be easy and rewarding. Potential product packages could include the following (by way of example).

- Accommodation + dining + unique experience, such as a guided Aboriginal tour, SUP experience or boating tour.
- Accommodation + dining + shopping + event participation, such as a show at the Arts Precinct.
- Accommodation + dining + light show experience.

Importantly, product packaging needs to actively encourage night time events and experiences, to generate more overnight stays in Karratha and higher visitor spend.

## Karratha Gateway Entrance Signage

### How to activate (actions)

- Identify locations for signage to be erected
- Determine the style of signage to best reflect the recent city brand development which Karratha has undertaken in 2018
- Test with the community to ensure whatever is designed evokes a positive response and strong community pride
- Test with roading departments and other relevant state government agencies to ensure compliance
- Ensure signage design options consider key factors such as durability, profile from the road, cost of replacement in case of vandalism etc; cost of construction, etc.

### Measures

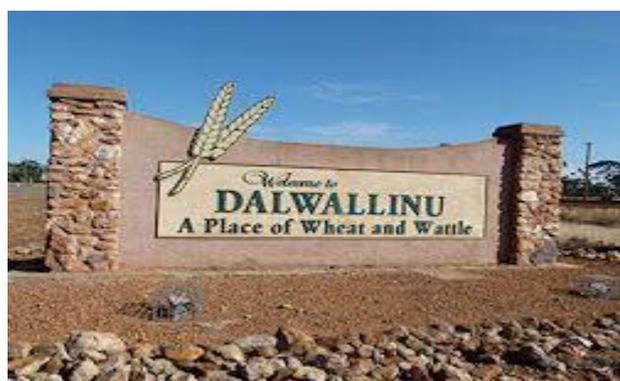
- Survey visitors to gauge awareness of gateway signs
- Check for longevity and wear and tear
- Link with other visitor way finding product to ensure a consistent suite of signs and brand work is provided within the region
- Gauge ongoing support with the local community through community survey
- Gauge value of new Karratha city brand as illustrated through the gateway signage and other mechanisms adopted

### Market to focus on

- All visitor markets
- Locals

It is noted that the TAG are keen to encourage more travellers to venture off the highway and visit Karratha. The Red Dog entry signage and sculpture at the entry to Dampier is a well known sign and a good example of a way to continue to raise destination profile. The films centred on the Red Dog are well recognised nationally and reinforcing with appropriate signage is an effective way to leverage the Dampier profile created from the movie. There is also a need to introduce a community pride element for Karratha to encourage the host community (local residents) to be stronger advocates for Karratha.

Examples of town gateway signage is provided below, as indicative examples only. Consideration may want to be given to developing gateway signage through a state or national design competition, with the only constraint being the need to integrate the new Karratha city branding imagery.







## 7. Action Plan

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Table 11 - Table 14 provides the implementation plan to assist Council and industry in delivering the various initiatives identified in this DMP. Importantly, it highlights specific actions, the various tasks required, the primary organisation responsible (which may include a group of agencies), a priority, an estimate only of the budget required (where possible) and a series of key performance indicators.

It is important to note that the budget estimates are purely indicative to assist Council in allocating a level of resource to deliver the specific action identified and, where required, to determine if funding support from the WA State Government is required.

### 7.1. Project Evaluation Framework for Assessing Activation Areas

As noted in section 6 above, there are numerous opportunities to pursue and activate. Determining the prioritisation of areas to activate is often challenging due to:

- Competing industry and community interests with different projects;
- The quantum of investment required and which often necessitates the active involvement of Council; and
- The desired outcomes and their subsequent support from State and Federal Government agencies due to policy direction and priorities.

The following offers a framework to assist Council and industry in prioritising tourism projects for activation. It reflects the key criteria to apply for tourism based projects. What it doesn't show is any criteria weighting which might be applied to individual projects and the criterion value. That is, Council may determine that for example, a project should be awarded greater prioritisation value if it can generate stronger growth in new markets, or higher yield, or its ability to address seasonality, etc. These are factors which Council needs to consider as not all elements may warrant equal value. And it is beyond this DMP to offer a weighting to each criteria.

As illustrated in the framework below, the economic benefits and impacts are likely to cover more criteria for tourism projects than the other variables of social, cultural or environmental benefits. Whilst there is often a correlation to social, cultural or environmental impacts from many tourism projects to be activated, it is the impact on the local visitor economy which would generally be more prominent, as seen through growth in local employment, new investment, higher visitor expenditure patterns and the growth in Karratha's economic diversity etc.

Whilst the framework offered does have multiple criteria to consider for each project and may appear somewhat complex, it offers a robust appraisal system for evaluating why projects should be given higher prioritisation than others. Importantly, it offers the key criteria for helping to assess project risk and return. This is essential for helping to determine how hard or easy it may be to actually encourage private sector investment to support a projects activation. And to determine where Council should be applying its resources to achieve desired outcomes as recommended in this DMP.

Table 10 Project Assessment Framework

DMP Project Prioritisation Project Assessment Criteria	Project Benefits and Impacts			
	economic	social	cultural	environmental
tourism catalyst project	x	x	x	x
increase visitation	x			
increase yield	x			
raise destination profile	x	x	x	x
level of investment	x			
community support	x	x	x	x
industry support	x			
funding availability	x			
project risk	x	x	x	x
human resource capacity	x	x		
seasonality impact addressed	x			
commercial viability	x			
social improvement		x		
social inclusion		x	x	
competition	x			
market demand	x			
growing new markets	x	x	x	x
State Govt support	x	x	x	x
Federal Govt support	x	x	x	x
time frame for implementation	x			
land ownership	x	x	x	x
local employment generator	x	x	x	
site improvement/enhancement	x			x
link to Council existing plans/strategies	x	x	x	x
ease of implementation	x	x	x	x

**Table 11: Activation Area - Working better together**

Action	Tasks	Responsibility	Priority	Budget Estimate	KPIs
Ensure tourism industry operators are represented on the TAG	<ul style="list-style-type: none"> <li>▪ Broaden the base of attendees to allow for wider input.</li> <li>▪ Consider industry reps from outside of the region to offer a broader perspective</li> </ul>	Council	1	n/a	<ul style="list-style-type: none"> <li>▪ Identify 3-4 industry players to be seconded to the TAG by March 2019</li> <li>▪ If required, identify 1-2 industry players outside of the region who may offer a broader tourism industry perspective and engage them by June 2019</li> </ul>
Industry networking and information sessions	<ul style="list-style-type: none"> <li>▪ Offer to facilitate 2-3 networking sessions per annum to create stronger coordination between players</li> </ul>	Council in the absence of a tourism industry organisation	1	n/a	<ul style="list-style-type: none"> <li>▪ Council facilities initially 2 sessions per calendar year, with one facilitated prior to 30 Dec 2018</li> <li>▪ Positive industry feedback and good numbers of attendees noted</li> </ul>
Industry training and upskilling	<ul style="list-style-type: none"> <li>▪ To work with the RTO and Tourism WA to encourage industry to upskill through available training programs offered</li> </ul>	Council, Australia's North West RTO	1	n/a	<ul style="list-style-type: none"> <li>▪ A series of training programs is advised to industry for 2019, by Dec 2018</li> <li>▪ No less than 20% of industry operators take advantage of upskilling options per annum</li> </ul>

**Table 12: Activation Area - Growing demand through development & investment**

Action	Tasks	Responsibility	Priority	Budget Estimate	KPIs
Branded, higher-quality hotel property	<ul style="list-style-type: none"> <li>▪ To ensure the introduction of a quality 3.5-4 star property is operational by 2021</li> </ul>	Council, Pilbara Development Commission and investors/operator	2	n/a	<ul style="list-style-type: none"> <li>▪ Council to ensure new hotel is operational by late 2021</li> <li>▪ Need to start to market the new hotel to higher spend visitor markets 6 months prior to opening</li> </ul>
Council incentivisation for private investment	<ul style="list-style-type: none"> <li>▪ Council policy guidelines clear on projects where council funding support is required</li> </ul>	Council	1	TBC	<ul style="list-style-type: none"> <li>▪ Council to note the need for new visitor attractions and experiences as a priority where funding assistance may need to be considered, ongoing</li> <li>▪ Council to identify Council land where new tourism product could be established, by June 2019</li> <li>▪ To aim for one new visitor attraction or experience to be introduced every 18-24 months, commencing from 2020</li> </ul>
Dampier Marina as a hub for water-based recreation	<ul style="list-style-type: none"> <li>▪ To encourage the development of a marina, noting its strategic location</li> </ul>	Hampton Harbour Boat and Sailing Club, Council (with involvement of industry)	3	TBC	<ul style="list-style-type: none"> <li>▪ To support a robust business case for how the development will be funded and developed, by Dec 2019</li> <li>▪ Assuming its proven feasible, to work with parties to secure funding for the marina</li> </ul>
Night Time Outdoor Dining Activation	<ul style="list-style-type: none"> <li>▪ To encourage hotels, catering companies and others to offer outdoor wilderness dining</li> <li>▪ Assess concepts such as Dinner on the Rocks or other examples to stimulate overnight visitation and higher spend patterns</li> </ul>	Council (with involvement of industry)	1	n/a	<ul style="list-style-type: none"> <li>▪ To work with industry to identify sites easily accessible and close to Karratha, by June 2019</li> <li>▪ To agree up to 6 sites which are sufficiently far apart they can offer a degree of exclusivity and to determine a booking system, managed by Council (assuming on Council owned or managed land), by July 2019</li> <li>▪ To facilitate at least two operators to be offering dining under the stars "on the rocks" by March 2020</li> </ul>

Action	Tasks	Responsibility	Priority	Budget Estimate	KPIs
Higher-Quality Destination Holiday Park	<ul style="list-style-type: none"> <li>To facilitate the introduction of a higher quality destination holiday park in the region</li> <li>To work with major destination holiday park branded operators to encourage investment</li> </ul>	Council (with involvement of industry)	2	\$25k feasibility study	<ul style="list-style-type: none"> <li>To identify sites of no less than 8 ha. for destination holiday park(s) by June 2019</li> <li>Assuming a site is located, to develop a feasibility study to be used as an investment prospectus, by Dec 2019</li> <li>To encourage support from major operators and investors by June 2020 through a marketing campaign</li> <li>To engage an investor by June 2021</li> </ul>
Investment memorandum and facilitation of investment forums	<ul style="list-style-type: none"> <li>To raise the profile of investment opportunities</li> <li>To encourage a broad range of investors to consider Karratha for tourism development</li> </ul>	Council (with involvement of industry) and Pilbara Development Commission	1	\$25k for investment memorandum	<ul style="list-style-type: none"> <li>To agree projects to be promoted by June 2019</li> <li>To develop memorandum as a sell doc by Dec 2019</li> <li>To set up and hold at least 3 investment forums to present opportunities at in Melbourne, Sydney and Singapore, by October 2020</li> <li>To secure funding for at least 2 projects by Dec 2021</li> <li>To develop projects by June 2023</li> </ul>
Island glamping facility	<ul style="list-style-type: none"> <li>To encourage small scale glamping in the Dampier Archipelago rather than permanent structures</li> </ul>	Council (with involvement of industry) and relevant State Govt agencies such as DBCA	2	n/a	<ul style="list-style-type: none"> <li>To meet with DBCA to discuss areas for potential and site sustainability issues, by June 2019</li> <li>To identify and secure one site at least for up to 12 glamping tents and a centralised service facility by Dec 2020</li> <li>To identify a highly skilled and acceptable operator to DBCA to operate the glamping operation on a commercial basis, by June 2021</li> <li>If viable, to encourage commencement of a glamping operation by June 2022</li> </ul>
Karratha Airport as a light aircraft recreation hub	<ul style="list-style-type: none"> <li>To expand tourism and recreation aviation activity</li> </ul>	Council (with involvement of industry) and Airport Company	3	n/a	<ul style="list-style-type: none"> <li>To engage with Karratha Airport to discuss development and expansion of aviation tourism activity, by 30 June 2020</li> <li>To identify activity which is compatible to operate close to regular passenger services by Dec 2020</li> <li>To encourage tourism aviation operators, if proven viable, to use Karratha as a potential hub for scenic flights, for gliding and other recreation pursuits, and as a possible venue for a tourism aviation event, by Dec 2021</li> <li>To encourage at least one new operator in tourism aviation by Dec 2022</li> </ul>
Murujuga Living Knowledge Centre Enhancements	<ul style="list-style-type: none"> <li>To assist the viability of the proposed Murujuga Living Knowledge Centre by adding value adds</li> </ul>	Council (with involvement of industry) and local Indigenous groups	2	n/a	<ul style="list-style-type: none"> <li>To identify mechanisms and product to support the viability of the proposed Murujuga Living Knowledge Centre, by Dec 2019</li> <li>To ensure the Murujuga Living Knowledge Centre is operational by Dec 2022</li> <li>To ensure that the Murujuga Living Knowledge Centre has sufficient complimentary tourism product (historic, nature based etc.) to be able to operate on a cost neutral basis or better, by Dec 2023</li> </ul>
Cossack heritage style camping and cabins	<ul style="list-style-type: none"> <li>To encourage greater visitation to Cossack and visitor spend</li> </ul>	Council (with involvement of industry) and	3	\$20k for feasibility study for heritage style	<ul style="list-style-type: none"> <li>To assess potential sites for commercial camping and heritage style cabins by Dec 2020</li> </ul>

Action	Tasks	Responsibility	Priority	Budget Estimate	KPIs
	<ul style="list-style-type: none"> <li>To support other forms of visitor attractions which can complement the high quality historic buildings and uniqueness of the site</li> </ul>	relevant State Govt agencies		accommodation (camping and cabins)	<ul style="list-style-type: none"> <li>To undertake a feasibility study to verify the scale of development and to test viability, by June 2021</li> <li>If proven viable, to determine night time attractions and visitor experiences to act as an anchor to encourage more visitors to stay overnight at Cossack, by Dec 2021</li> <li>To investigate state and federal funding options for both the camping and cabin development option and the separate night time visitor attraction, and secure by Dec 2022</li> </ul>
Explorer Cruise Ship visitation	<ul style="list-style-type: none"> <li>To support growth in the cruise ship niche market to the region</li> <li>To support the introduction of new tourism product development</li> </ul>	Pilbara Port Authority, Council and industry	3	tbc	<ul style="list-style-type: none"> <li>To liaise with the various explorer cruise ship operators to test market demand, by Dec 2020</li> <li>If demand is proven, to identify upgrades and introduction of new infrastructure to support visits by smaller explorer cruise vessels to the Port of Dampier by June 2021</li> <li>To ensure sufficient commissionable tourism product is operational for cruise ship visitors, by Dec 2021</li> </ul>

**Table 13: Activation Area - Diversifying and growing destination events**

Action	Tasks	Responsibility	Priority	Budget Estimate	KPIs
Events to leverage natural assets such as a Big Red Fishing Competition	<ul style="list-style-type: none"> <li>Create an on-water event to get more sea based activity and encourage more boats to come to Karratha for fishing charters and one of annual events</li> </ul>	Council (with involvement of industry)	1	\$30k to organise plus sponsorship	<ul style="list-style-type: none"> <li>Work with industry operators (local and interstate) to create the elements for an annual fishing competition, by Dec 2019</li> <li>Identify sponsors and promoters by July 2020</li> <li>Secure major sponsors by Dec 2020</li> <li>Look to hold first fishing competition by July 2021</li> <li>Assess fishing comp annually</li> </ul>
Event toolkit	<ul style="list-style-type: none"> <li>To support a more professional event sector and encourage all parties interested in event development to adopt agreed criteria</li> </ul>	Council (with involvement of industry)	1	n/a	<ul style="list-style-type: none"> <li>Look to offer a free tool kit on line via the Council website, by Dec 2019</li> <li>Assess take up of event tool kit annually</li> <li>Revise as required</li> </ul>
Light show leveraging off and showcasing Karratha's natural environment	<ul style="list-style-type: none"> <li>Create evening entertainment activity as a value add to stimulate greater overnight visitation</li> </ul>	Council	2	\$20k feasibility study	<ul style="list-style-type: none"> <li>Conduct a feasibility study into the viability of a light show by June 2020</li> <li>If viable, identify funding sources by Dec 2020</li> <li>Develop implementation program during 2021</li> <li>If supported, look to establish by June 2022</li> <li>Assess ongoing support annually</li> </ul>
Major Sports Destination Event	<ul style="list-style-type: none"> <li>Establish a sports-based event to drive greater awareness of the region and create as the signature Pilbara event</li> <li>Look at a major triathlon event, as an example</li> </ul>	Council (with involvement of industry)	2	\$30k to organise plus sponsorship	<ul style="list-style-type: none"> <li>Assess local support and identify sponsors by Dec 2019</li> <li>Develop implementation program by Dec 2020</li> <li>Look to hold the first triathlon by Oct 2021</li> </ul>

Red Earth Arts Precinct National Exhibition & Event Program	<ul style="list-style-type: none"> <li>Encourage wider regionally significant exhibition program so the arts precinct becomes the major visual and performing arts venue in northern western WA</li> </ul>	Council	1	\$40k pa for marketing	<ul style="list-style-type: none"> <li>Identify state level support for visual and performing arts exhibition and related program by Dec 2019</li> <li>If supported, put in place program to stimulate visitation by June 2020</li> <li>Ensure state and national level exhibition and performance options are offered from 2021 onwards</li> </ul>
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**Table 14: Activation Area - Promoting Karratha as a vibrant destination**

Action	Tasks	Responsibility	Priority	Budget Estimate	KPIs
Assessment of visitor information services (and relocation of the VC to a town centre location)	<ul style="list-style-type: none"> <li>Assess needs for visitor services including move to digital information</li> </ul>	Council	1	\$25k for review	<ul style="list-style-type: none"> <li>Commission a review of the supply of visitor information services (not just visitor info centres) by Dec 2019</li> <li>Assess options and implement review findings commencing Oct 2020</li> <li>Survey visitors annually from March 2021</li> </ul>
ATDW audit and listing	<ul style="list-style-type: none"> <li>Identify all tourism product and encourage product to be listed on the Australian Tourism Data Warehouse</li> </ul>	Council (with involvement of industry)	1	\$15k for audit	<ul style="list-style-type: none"> <li>Commission an audit of all tourism and related product in the region, by June 2020</li> <li>Assess both quality and quantity</li> <li>Look to have 70% of quality product registered on the ATDW by June 2021</li> </ul>
Local awareness and ambassador program	<ul style="list-style-type: none"> <li>Raise profile of visitor economy</li> <li>Encourage stronger community pride in tourism</li> <li>Encourage volunteer program to support visitor info</li> </ul>	Council (with involvement of industry)	1	\$20k for tourism impact assessment	<ul style="list-style-type: none"> <li>Commission a tourism impact assessment to provide quality base data to show the tourism dollar is spent on products and services within the region, by Dec 2020</li> <li>Create an infographic to be published online to illustrate the impact of the visitor economy in the region on any given day to illustrate visitor spend on groceries, eating out, petrol etc, by June 2021</li> <li>Update the impact assessment and infographic annually to monitor progress in visitor economy growth, from June 2022</li> </ul>
Product packaging	<ul style="list-style-type: none"> <li>To encourage greater packaging of product to combine accommodation options, attractions, tours and food and beverage</li> </ul>	Council (with involvement of industry)	1	n/a	<ul style="list-style-type: none"> <li>Work with operators to encourage packaging of product to make it far easier for visitors to both fly in and drive in to Karratha for short break experiences, commencing in 2020</li> <li>Ensure product packaging options are outlined and bookable on the new destination website by March 2021</li> </ul>
Gateway Signage to Karratha	<ul style="list-style-type: none"> <li>To encourage more travellers to enter Karratha</li> <li>To encourage visitors to stop and spend</li> </ul>	Council (with involvement of industry)	2	\$500k for estimated gateway signage design and implementation	<ul style="list-style-type: none"> <li>To assess preferred locations for signage by Dec 2020</li> <li>To undertake, through a design competition, a process to introduce the new Karratha city brand into new gateway signage and to complete all design work by Dec 2021</li> <li>To construct all Karratha city gateway highway signage and complete by June 2022</li> </ul>



## 8. Supporting Documentation

### Supporting Documentation 1: Product Audit Findings

Table 15: Full product audit findings

Category	Name	In LGA or Out?	Primarily Free or Paid?
Aquatic & Coastal	Staircase to the Moon	In LGA	Free
Aquatic & Coastal	Pilbara Dive and Tours	In LGA	Paid
Aquatic & Coastal	Discovery Cruising	In LGA	Paid
Aquatic & Coastal	Cracker Jack Paddle	In LGA	Paid
Aquatic & Coastal	Karratha Kite School	In LGA	Paid
Aquatic & Coastal	Pelican Charters	In LGA	Paid
Aquatic & Coastal	Sacred Earth Safaris	In LGA	Paid
Aquatic & Coastal	Hearsons Cove	In LGA	Free
Aquatic & Coastal	Point Samson Beach	In LGA	Free
Sport & Adventure	HeliSpirit	In LGA	Paid
Sport & Adventure	Karratha Leisureplex	In LGA	Paid
Sport & Adventure	Roebourne Aquatic Centre	In LGA	Paid
Sport & Adventure	Roebourne Skatescape	In LGA	Free
Sport & Adventure	Karratha Bmx Club	In LGA	Paid
Sport & Adventure	Burrup Mountain Bike Track	In LGA	Paid
Sport & Adventure	Karratha Enduro and Motocross Club	In LGA	Paid
Sport & Adventure	Nickol Bay Speedway	In LGA	Paid
Sport & Adventure	Karratha Shooting Club	In LGA	Paid
Sport & Adventure	Karratha Country Golf Club	In LGA	Paid
Sport & Adventure	WRAPS Motocross Club	In LGA	Paid
Sport & Adventure	Roebourne Racecourse	In LGA	Paid
Sport & Adventure	Karratha Kart Club Inc	In LGA	Paid
Sport & Adventure	Mara Guthurra Adventure Playground, Karratha WA	In LGA	Free
Aboriginal, History & Culture	Point Samson Heritage Trail	In LGA	Free
Aboriginal, History & Culture	Moonrise Cinema	In LGA	Paid
Aboriginal, History & Culture	Deep Gorge - Rock Art site	In LGA	Free
Aboriginal, History & Culture	Yaburara Heritage Trail	In LGA	Free
Aboriginal, History & Culture	Ngurrangga Tours	In LGA	Paid
Aboriginal, History & Culture	Red Earth Arts Precinct	In LGA	Free
Aboriginal, History & Culture	Cossack Historic Town	In LGA	Free
Aboriginal, History & Culture	Roebourne Visitor Centre & Old Gaol Museum	In LGA	Free
Aboriginal, History & Culture	Mt Welcome	In LGA	Free
Aboriginal, History & Culture	Pilbara Tour Co.	In LGA	Paid
Aboriginal, History & Culture	Jarman Island Lighthouse	In LGA	Free
Aboriginal, History & Culture	Red Dog Memorial Statue	In LGA	Free
Aboriginal, History & Culture	Ngurin Bush Tucker Trail	In LGA	Free
Aboriginal, History & Culture	Sam's Island	In LGA	Free
Aboriginal, History & Culture	Karratha Arts and Learning Centre	In LGA	Free
Aboriginal, History & Culture	Cossack Heritage Trail	In LGA	Free
Aboriginal, History & Culture	Roeburn Heritage Trail	In LGA	Free
Aboriginal, History & Culture	Red Dog Trail	In LGA	Free

Category	Name	In LGA or Out?	Primarily Free or Paid?
Nature & Wildlife	Miaree Pool	In LGA	Free
Nature & Wildlife	Murujuga National Park	In LGA	Free
Nature & Wildlife	Frosty's Aussie Adventures	In LGA	Paid
Mining & Resource	North West Shelf Project Visitor Centre	In LGA	Free
Mining & Resource	Mine tours	In LGA	Paid
Visitor Information	Karratha Visitor Centre	In LGA	Free
Visitor Information	Roebourne Visitor Centre	In LGA	Free
Lookouts	Searipple Lookout	In LGA	Free
Lookouts	Reader Head Lookout	In LGA	Free
Lookouts	Dampier Lookout	In LGA	Free
Lookouts	Dampier Salt Lookout	In LGA	Free
Lookouts	Harding Dam Lookout	In LGA	Free
Lookouts	Karratha Lookout	In LGA	Free
Nature & Wildlife	Karijini National Park	Out of LGA	Free
Nature & Wildlife	Python Pool	Out of LGA	Free

## Supporting Documentation 2: Accommodation Audit Findings

Table 16: Full accommodation audit findings

Category	Name	Tourism Accommodation?	Room Units	Number of Sites
Serviced/Self-Contained Apartment	Latitude20 The Dunes Apartments	Yes	44	-
Serviced/Self-Contained Apartment	Latitude20 Searipple Rd Apartments	Yes	10	-
Serviced/Self-Contained Apartment	Morse Court Apartments	Yes	9	-
Serviced/Self-Contained Apartment	Samson Beach Chalets	Yes	16	-
Hotel and motel	Econo Lodge Karratha	Yes	41	-
Hotel and motel	Best Western Karratha Central Apartments	Yes	84	-
Hotel and motel	Karratha International Hotel	Yes	80	-
Hotel and motel	Cattrall Park Motel Karratha	Yes	29	-
Hotel and motel	ibis Styles Karratha	Yes	47	-
Hotel and motel	Best Western Plus The Ranges Karratha	Yes	73	-
Hotel and motel	Point Samson Resort	Yes	14	-
Hotel and motel	Dampier Mermaid Hotel	Yes	68	-
Hotel and motel	Comfort Inn and Suites Karratha	Yes	23	-
Hotel and motel	Velocity Motel and Restaurant	Yes	47	-
Hotel and motel	Whim Creek Hotel	Yes	52	-
Holiday Park	Discovery Parks Pilbara Karratha	Yes	91	76
Holiday Park	Discovery Parks Balmoral Karratha	Yes	-	155
Holiday Park	The Cove Holiday Village	Yes	17	93
Transit Caravan Parks	Karratha Caravan Park	Yes	80	104
Transit Caravan Parks	Samson Beach Caravan Park	Yes	-	19
Transit Caravan Parks	Dampier Transit Caravan Park	Yes	-	30
Transit Caravan Parks	Fortescue River Roadhouse and Caravan Park	Yes	-	?
Campsites	Cleaverville Beach Camping - legal	Yes	-	-
Campsites	40 Mile Campsite - legal	Yes	-	-
Campsites	Peawah River 24hr Rest Area Campsite - legal	Yes	-	-
Campsites	Council Seasonal RV Stop - Bayview Road	Yes	-	-
Campsites	Enderby Island Camping - Free & Legal	Yes	-	-
Campsites	Angel Island Camping - Free & Legal	Yes	-	-
Campsites	Gidley Island Camping - Free & Legal	Yes	-	-
Campsites	Dolphin Island Camping - Free & Legal	Yes	-	-
Campsites	Delambre Camping - Free & Legal	Yes	-	-
Campsites	Rosemary Island Camping - Free & Legal	Yes	-	-
Campsites	Eaglehawk Island Camping - Free & Legal	Yes	-	-
Campsites	Malus Islands Camping - Free & Legal	Yes	-	-
Campsites	Miaree Pool Rest Area - Free & Legal	Yes	-	-
Campsites	Settlers Beach Campsite - WikiCamp	Yes	-	-
Campsites	Fortescue River Mouth Campsite - WikiCamp	Yes	-	-
Campsites	Sherlock River Campsite - WikiCamp	Yes	-	-
Campsites	Devil Creek Campsite - WikiCamp	Yes	-	-
Campsites	Kialrah Pool Campsite - WikiCamp	Yes	-	-
Campsites	Balla Ball Pool Campsite - WikiCamp	Yes	-	-
Backpackers and Budget Accommodation	Karratha Backpackers	Yes	11	-

Category	Name	Tourism Accommodation?	Room Units	Number of Sites
Backpackers and Budget Accommodation	Cossack Budget Accommodation	Yes	6	-
Mining and Longer Term Accommodation	Latitude20 Roebourne Village	No - primarily mining or resource sector	26	-
Mining and Longer Term Accommodation	Rio Tinto Lodge Wickham	No - primarily mining or resource sector	198	-
Mining and Longer Term Accommodation	Cherratta Lodge	No - primarily mining or resource sector	336	-
Mining and Longer Term Accommodation	Karratha Village	No - primarily mining or resource sector	121	-
Mining and Longer Term Accommodation	Searipple Village Karratha	No - primarily mining or resource sector	130	-
Mining and Longer Term Accommodation	Aspen Karratha Village	No - primarily mining or resource sector	181	-
Mining and Longer Term Accommodation	Stayover Kingfisher Village	No - primarily mining or resource sector	249	-
Mining and Longer Term Accommodation	Civeo Karratha Village	No - primarily mining or resource sector	208	-
Mining and Longer Term Accommodation	Karratha Lodge	No - primarily mining or resource sector	30	-
Mining and Longer Term Accommodation	Rio Tinto Cajuput Villas	No - primarily mining or resource sector	132	-
BnB and Airbnb	Amani Cottage	Yes	1	-
BnB and Airbnb	Delilah's Bed and Breakfast	Yes	3	-
BnB and Airbnb	Baynton Retreat	Yes	4	-
BnB and Airbnb	Samson Hideaway	Yes	1	-
BnB and Airbnb	Helen's Studio Unit	Yes	1	-
BnB and Airbnb	The Tides Holiday House	Yes	4	-

