

An aerial photograph of a rugged landscape featuring prominent, layered rock formations. The rock faces are characterized by distinct horizontal bands of varying colors, including shades of brown, orange, and grey. The formations are arranged in a series of rounded, conical shapes that resemble a series of steps or a staircase. The surrounding terrain is a mix of rocky outcrops and patches of green vegetation, including small shrubs and mosses. The lighting is bright, casting shadows that emphasize the texture and depth of the rock layers.

AUSTRALIA'S NORTH WEST
TOURISM DESTINATION
MANAGEMENT PLAN

♀ PURNULULU NATIONAL PARK, THE KIMBERLEY



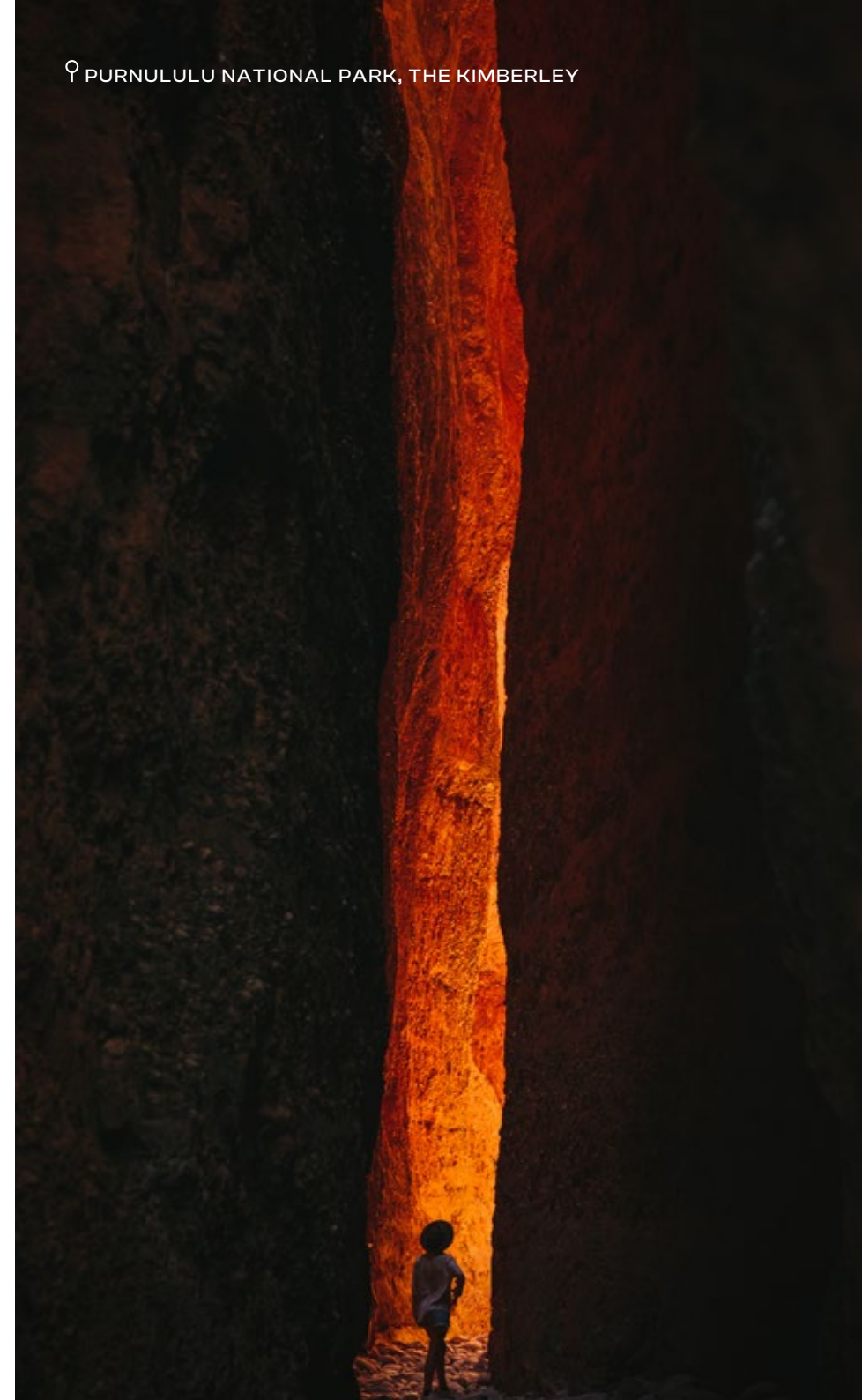


ACKNOWLEDGEMENT OF COUNTRY

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

LIST OF ACRONYMS

ACRONYM	DESCRIPTION
ACs	Aboriginal Corporations
BEP	Business Events Perth
DBCA	Department of Biodiversity, Conservation and Attractions
DTWD	Department of Training and Workforce Development
DoT	Department of Transport
DPC	Department of Premier and Cabinet
DPLH	Department of Planning, Land and Heritage
DevWA	Development WA
Industry	Tourism Industry
KDC	Kimberley Development Commission
KMSB	Kimberley Marine Support Base
KMTA	Kimberley Marine Tourism Association
KPA	Kimberley Ports Authority
LGA	Local Government Authority
MRD Hwy	Manuwarra Red Dog Highway
MRWA	Main Roads Western Australia
NBY	Nyamba Buru Yawuru
PDC	Pilbara Development Commission
RPT	Regular Passenger Transport
RTDS	Regional Tourism Development Strategy
RTO	Regional Tourism Organisation
SoB	Shire of Broome
TDMP	Tourism Destination Management Plan
TOs	Traditional Owners
TWA	Tourism Western Australia
VC	Visitor Centre
WAITOC	Western Australian Indigenous Tourism Operators Council
WALGA	Western Australian Local Government Association

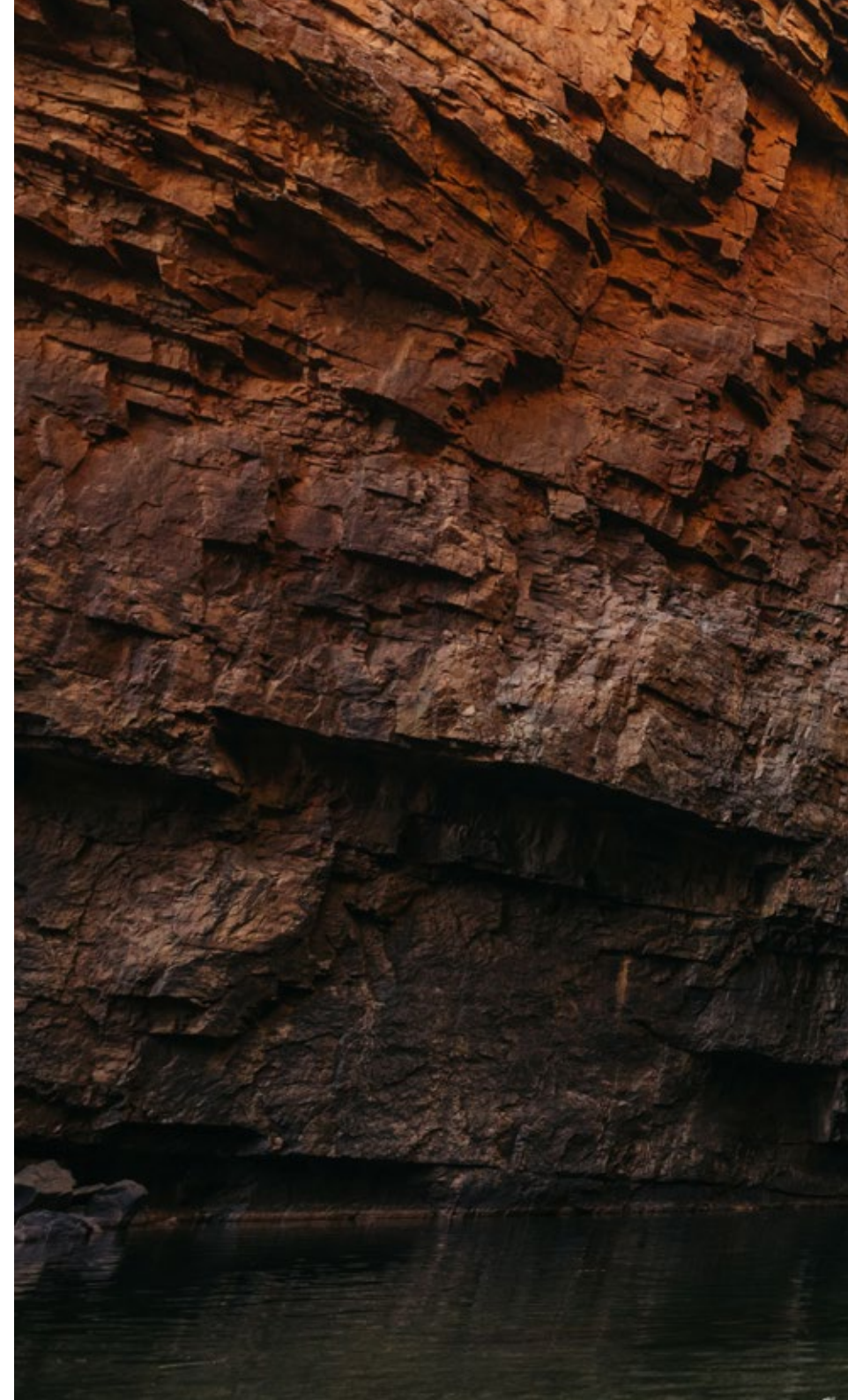


KEY AGENCIES & THEIR ROLES

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

CONTENTS

List of Acronyms	4
Key Agencies & their Roles	5
Introduction	8
Plan on a Page	9
Part 1: TDMP Vision, Goals & Priorities	10
10-Year Vision	12
10-Year Tourism Goals & Priorities	14
Part 2: Understanding the Region	16
Australia's North West Tourism Region Overview	18
Visitor Economy	20
Market Segmentation & Positioning	22
Access	24
Accommodation	28
Activities, Attractions & Events	30
Part 3: Insights Informing the TDMP	34
Destination Maturity of ANW Subregions	36
Trends & Focuses	42
Consumer Insight Research Summary	46
International Market Insights	52
Domestic Market Insights	58
Opportunities & Challenges	62
Part 4: Strategy & Implementation	72
Priority Projects	74
ANW Action Plan	80





INTRODUCTION

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

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

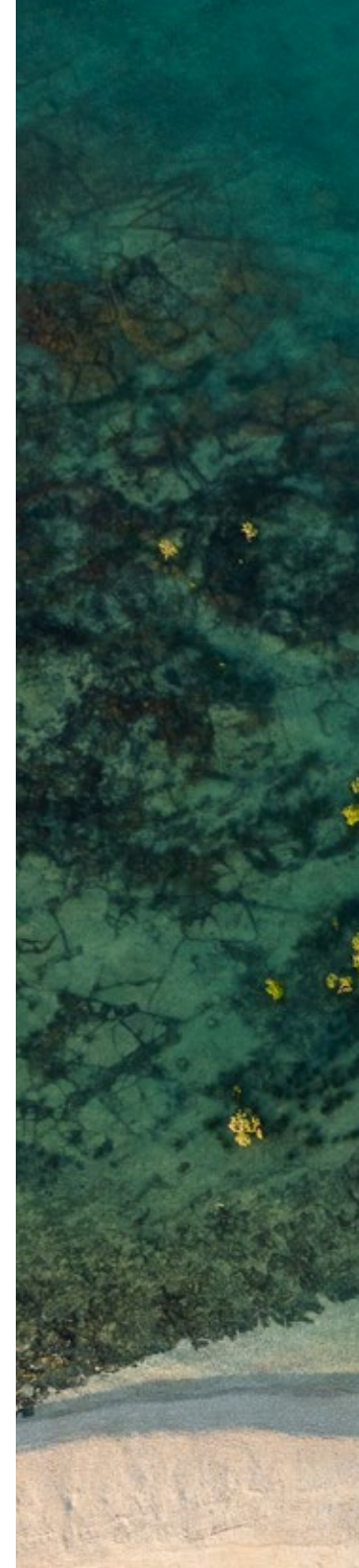
Both the TDMP and RTDS documents address gaps in the following areas:

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

ANW TDMP outputs:

- The TDMP, an overarching 10-year plan for the ANW tourism region (this document).
- Two abridged RTDS, establishing tourism projects and actions within Pilbara and Kimberley Development Commission regions.

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



PLAN ON A PAGE

VISION

The ANW region is the destination of choice for outstanding nature-based experiences, Aboriginal culture and outdoor adventure.

GUIDING PRINCIPLES

SUSTAINABILITY

COLLABORATION

CONNECTED

OUTSTANDING

10-YEAR GOALS

Grow capacity and infrastructure in aviation, self-drive and cruise.

Diversify the accommodation offer in line with market needs.

Increase the choice, quality and quantity of tourism attractions.

Position ANW as the premier Aboriginal tourism region in Australia.

Clarify the regional and subregional brands to raise awareness.

Maximise the event program to support dispersal across the region.

Improve the long-term sustainability of the tourism sector.

INITIATIVES

- Improve road infrastructure: MRD Hwy, Banjima Drive, Warlu Way.
- Improve aviation connectivity and upgrade airport infrastructure.
- Increase the yield of the cruise sector.

- Grow inventory and range of accommodation in key visitor hubs.
- Facilitate development of nature-based, experiential accommodation.
- Assess market needs and facilitate investment in accommodation gaps throughout the region.

- Improve visitor infrastructure to support experience development — Lake Argyle Boat Ramp, Walmanyjun Cable Beach Foreshore Redevelopment.
- Facilitate the development of a signature experience for the Pilbara.

- Murujuga Tourism Precinct and Living Knowledge Centre.
- Aboriginal cultural centre in Broome.
- Expanding Aboriginal led experiences and accommodation.
- Implementation of the Jina Plan.

- Promotion of Savannah Way and Warlu Way.
- Activation of the Dampier Peninsula.
- Development of an ANW Brand and Style Guide aligned with Tourism WA.

- Grow the calendar of events, focusing on shoulder and off-season.
- Expand major events activities.

- Increase pool of tourism and hospitality workers.
- Facilitate development of worker accommodation.
- Increase length and yield of tourism season.
- Improve social and environmental sustainability of the sector.

PRODUCT DEVELOPMENT FOCUS

ABORIGINAL TOURISM

NATURE & BIODIVERSITY

ICONIC DRIVE JOURNEYS

AGRITOURISM

ARTS, CULTURE & HERITAGE

ADVENTURE

A landscape photograph of a savanna. In the foreground, there is a field of tall, dry, golden-brown grass. A single, medium-sized green tree stands in the center of the field. In the background, there are rolling hills with reddish-brown soil and sparse vegetation. The sky is a clear, pale blue. The text "PART 1: TDMP VISION, GOALS & PRIORITIES" is overlaid in white, bold, sans-serif font in the upper left quadrant.

**PART 1:
TDMP VISION, GOALS & PRIORITIES**



10-YEAR VISION

The ANW is the destination of choice for travellers to Western Australia who are seeking outstanding nature-based experiences, Aboriginal culture and outdoor adventure, where:

- Access** Travel into and within the region is facilitated by improved air, road and water access.
- Visitors** The visitor planning experience is made as efficient as possible, with easy access to information for booking accommodation, experiences and services that meet their varied needs.
- Industry** Tourism is established as a sustainable part of the Kimberley and the Pilbara regions and as a foundation for the diversification of the economy. Tourism is central to regional and local social and business communities and is recognised as a viable employment pathway.
- Government** Greater coordination is achieved across all government levels, aiming to ease the path for investment in the visitor economy. Government entities support, advise and facilitate investment in tourism-related activities, helping to create greater project viability.





10-YEAR TOURISM GOALS & PRIORITIES

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

- Pursue ongoing, long-term regular passenger transport (RPT) aviation connections to intrastate, major east coast and key international markets, supporting airport capacity upgrades where required to grow the inbound visitor market.
- Support the increase and activation of road infrastructure to facilitate visitor dispersal:
 - Align product development and visitor infrastructure with the Manuwarra Red Dog Highway (MRD Hwy).
 - Increase visitor infrastructure and signage on Pilbara's Warlu Way to be a tourism focused self-drive asset.
- Grow the reputation and value of the Kimberley cruise experience, to leverage the significant investment and expansion of marine berthing infrastructure in the region.

2. Broaden the range of accommodation products across the region as relevant to market needs.

- In line with consumer demand, grow the inventory and range of visitor short stay accommodation, focusing on Broome, Kununurra/Lake Argyle, Dampier Peninsula and in/around national parks.

3. Increase the choice, quality and quantity of tourism products and attractions aligned to fundamental consumer interests.

- Improve tourism facilities (Lake Argyle Boat Ramp and entry road, township amenities and signage) at Lake Argyle and Kununurra.
- Maximise tourism opportunities in Broome through the redevelopment of the Walmanyjun Cable Beach Foreshore.
- Investigate opportunities for the development of a new signature experience for the Pilbara (e.g. skywalk, glass-bottom bridge, unique experiential product) and support its delivery.
- Diversify and expand the product offering across the region, focusing on: adventure; agritourism; Aboriginal tourism; nature and biodiversity; and arts, culture and heritage.

4. Work with Traditional Owners (TOs) to increase the Aboriginal tourism offering, positioning ANW as the premier Aboriginal tourism region in Australia.

- Support the development of the Murujuga Tourism Precinct and Living Knowledge Centre and an Aboriginal cultural centre in Broome, as anchor Aboriginal tourism attractions for the region.
- Expand the range of Aboriginal-led, cultural tourism experiences and accommodation throughout the region.

- Implement priority actions from the Jina: WA Aboriginal Tourism Action Plan 2021-2025 (or future edition) related to the Kimberley/ Pilbara, including the Custodians Program.

5. Clarify the regional and subregional brand propositions to maximise awareness and consideration of assets.

- Activate and promote Savannah Way as the major tourism drive route through the Kimberley and Broome subregions.
- Consolidate the branding and positioning of Warlu Way to maximise awareness of it as the major tourism drive route for the Pilbara.
- Activate and promote Dampier Peninsula as a significant tourism destination.
- Develop an ANW Brand and Style Guide and relevant toolkits, which utilises and clearly aligns to the Tourism WA global brand strategy and toolkits.

6. Maximise the events program to support dispersal across the region.

- Elevate and grow the calendar of events to support visitation, focusing on shoulder/off-season.
- Grow and expand the major events throughout the region.

7. Improve the long-term sustainability of the tourism sector.

- Support and facilitate training and development opportunities across the region to increase the pool of tourism workers.
- Encourage the development of tourism worker accommodation.
- Extend the length of the season by activating visitation opportunities in this period through focused product and event development, and strategic marketing to increase length of season and economic yield.
- Increase the social and environmental sustainability of the tourism industry through best-practice approaches.



PART 2:
UNDERSTANDING
THE REGION





AUSTRALIA'S NORTH WEST TOURISM REGION OVERVIEW

The ANW tourism region is a destination of dramatic natural beauty, stunning landscapes and wide-open spaces. It is one of the largest tourism regions not only in Western Australia, but across the whole of Australia.

It adjoins the Northern Territory to the east, the Australia's Golden Outback (AGO) tourism region to the south, and Australia's Coral Coast (ACC) tourism region to the southwest. The coast of the ANW region stretches from the northern-most reaches of the Kimberley, through the Dampier Peninsula, Broome, and down the Pilbara coast where it meets with the border of the ACC tourism region. In total, the region covers over 925,000 square kilometres.

Due to its geographic location, the region faces the considerable challenge of climate, which limits the primary tourism season to a period between late April and the end of October. Outside these times, the weather can be very hot, humid and challenging for some tourism-related activities.

Occasional heavy seasonal rains and the risk of cyclones can affect the region, and may result in remedial works to keep the road network fully operational in time for peak season. Conversely, as the southern parts of Australia cool down in winter, the ANW region's climate is ideal for tourism, with beautiful sunny days and mild nights.

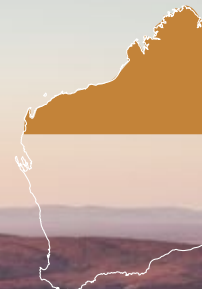
The ANW region possesses a wide range of natural attractions, open spaces and authentic experiences that interest the right target markets. A need for alignment between the region's tourism offering and the audiences' needs comes through strongly in the consumer research work undertaken during the preparation of this plan.

There is an opportunity for increased visitation if some of the existing challenges impacting the tourism sector can be addressed. These challenges include: regional accessibility by air; road and water; accommodation offerings; range of experiences; length of the tourism season; social challenges; and dominance of other industry sectors, such as resources.

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

- **The Kimberley**
- **Broome**
- **The Pilbara**

Each of these three locations has its distinct characteristics and is at differing stages in its development on the tourism destination life cycle (Figure 2: Tourism Destination Life Cycle).



- THE PILBARA
- THE KIMBERLEY
- BROOME



VISITOR ECONOMY

Sources: Tourism WA Regional Tourism Satellite Account (2021–22), Tourism Research Australia Tourism Businesses in Australia 2017 to 2022, Australian Bureau of Statistics, International Visitor Survey (2022, 2023), National Visitor Survey (2022, 2023).

VALUE OF THE VISITOR ECONOMY (2021–22)

- **\$748 million in Gross Regional Product**
- **\$665 million of Gross Value Added to the state economy**
- **818 tourism businesses**
- **7,600 jobs (direct and indirect).**

VISITOR PROFILE (YEAR ENDING (YE) DECEMBER 2023)

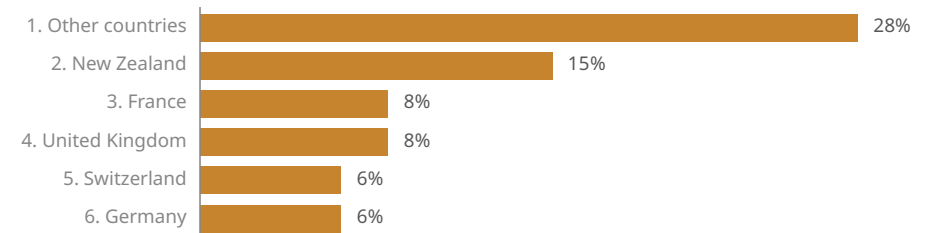
2.179 million visitors spending \$2.035 billion.

SOURCE	NO. VISITORS	SPEND	NIGHTS
INTERNATIONAL	48,000	\$89 million	40
INTERSTATE	272,000	\$517 million	9
INTRASTATE	1.255 million	\$1.260 billion	7
DAYTRIPS	604,000	\$169 million	N/A

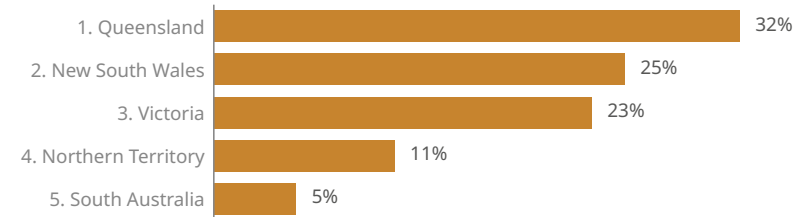
BUSINESS & EMPLOYMENT (2021–22)

TYPE	NUMBER OF BUSINESSES
MICRO (1-4 EMPLOYEES)	233
SMALL (5-19 EMPLOYEES)	186
MEDIUM (20-199 EMPLOYEES)	68

INTERNATIONAL MARKET TOP HOME COUNTRIES (2023)



INTERSTATE MARKET TOP HOME STATE/TERRITORY (2022-23)



TOTAL NUMBER OF OVERNIGHT VISITORS (YE DECEMBER 2023)

ANW WIDE
1.576 million

INTERNATIONAL
48,000

INTERSTATE
272,000

INTRASTATE
1.255 million

BROOME

INTERNATIONAL
18,000

DOMESTIC
259,000

THE KIMBERLEY

INTERNATIONAL
8,000

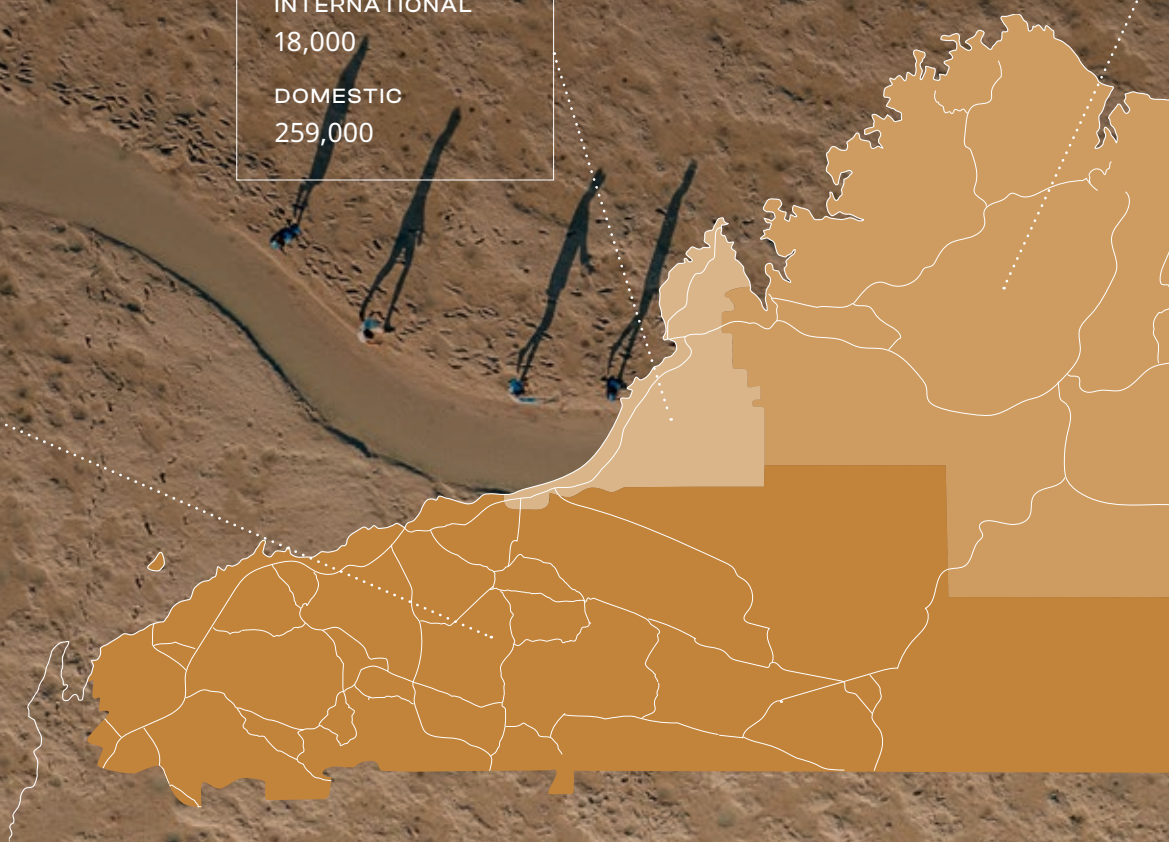
DOMESTIC
178,000

THE PILBARA

INTERNATIONAL
33,000

DOMESTIC*
1.049 million

*Please note: due to sample sizing, domestic visitation for the Pilbara subregion is annual average of 2022/23



MARKET SEGMENTATION & POSITIONING

MARKET DATA & SEGMENTATION

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

HIGH-YIELDING TRAVELLERS

Tourism WA focuses its marketing activities on targeting the High-Yield Traveller (HYT) segment, which is predominantly visitors from key international markets and interstate markets.

HYTs will differ for each destination and tourism experience within ANW and granular data is not available to identify these for each one. HYTs are broadly defined by Tourism WA as visitors who:

- are not challenged by long-haul travel and are considering a holiday to Western Australia;
- enjoy nature, wildlife, aquatic, coastal and food and wine experiences; and
- have above-average spending on holiday.

The important factors for a HYT for WA, when choosing a long-haul destination include: world-class nature and wildlife; a safe and secure destination; good food, wine, local cuisine and produce; world-class coastlines, beaches and marine wildlife; and rich history and heritage. The most appealing WA experiences are: outdoor/nature; observing wildlife/marine life; coastal/beach; engaging with wildlife/marine life; and food and wine experiences.

Priorities and actions identified in the TDMP and associated RTDS are designed to reflect the interests of this market and align with both WA's and the ANW tourism region's assets.

INTERSTATE & INTRASTATE MARKETS

This approach is complemented by the ANW RTO, which also targets HYTs and works with the Tourism WA domestic segmentation model to attract HYTs.



DESTINATION MARKETING

Current destination marketing responsibilities and focuses for key markets are outlined as follows:

- Tourism WA's activity currently focuses on attracting HYTs from international and interstate markets, with a strategic focus on the Kimberley region and Karijini National Park, due to its reputation, strong brand awareness and recognition as a visitation driver.
- ANW RTO is primarily responsible for intrastate markets and supporting Tourism WA in interstate markets.
- LTOs are responsible for marketing the subregions to intrastate markets.
- VCs are responsible for providing information to visitors once they arrive at a destination, that encourages them to stay longer, spend more money, experience more attractions and revisit.

GLOBAL TOURISM WA BRAND — WALKING ON A DREAM

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

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

The Walking On A Dream creative concept provides uniqueness to Tourism WA's marketing and communications, positioning Western Australia as an aspirational, memorable and desirable destination for leisure and business travel, now and into the future.

The global Tourism WA brand is a vital element of the framework to inform demand-side actions and priorities identified within the TDMP.

ANW BRAND POSITIONING

In its marketing approach, ANW splits into the Pilbara, Kimberley and Broome subregions. This enables targeted marketing and consumer awareness raising of each location's distinct characteristics. Clustering the experiences within a subregion in consumer facing communications also assists to combat the barrier of distance between key tourism locations within the broader ANW region.

ANW characterises the region in its positioning as:

"The three subregions of the North West — the Kimberley, Broome and the Pilbara — are like nowhere else on Earth. They are unique, soulful places that stop you in your tracks and forge a reconnection with yourself and the land.

They have the ability to make visitors feel the remarkable power of nature in their two-and-a-half billion-year-old gorges and 350-million-year-old ranges, sixty-thousand-year-old Aboriginal connection to country, their surging tides, horizontal waterfalls and Staircase to the Moon experiences in coastal locations.

In one of the last wilderness areas on Earth, you'll find a sense of freedom and adventure almost without bounds. By daylight, wander and roam to experience natural attractions billions of years in the making, and, at night, see more stars than you ever felt possible."

ACCESS

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

AVIATION

The Pilbara

Significant aviation facilities exist in key Pilbara locations, driven mainly by servicing the resources sector. Major airports at Karratha and Port Hedland are approximately two hours' flying time from Perth, served by multiple Qantas and Virgin flights per day. Other regional airports that currently have daily connections to Perth are Paraburdoo, Onslow and Newman.

Nexus Airlines services connect Newman, Port Hedland, Karratha, Broome and Geraldton (in the Australia's Coral Coast (ACC) region) enhancing the cross-regional connections between ACC and ANW. with options through the Inter-Regional Flight Network. RPT services from Perth to the Newman and Paraburdoo airports connect travellers to Karijini National Park.

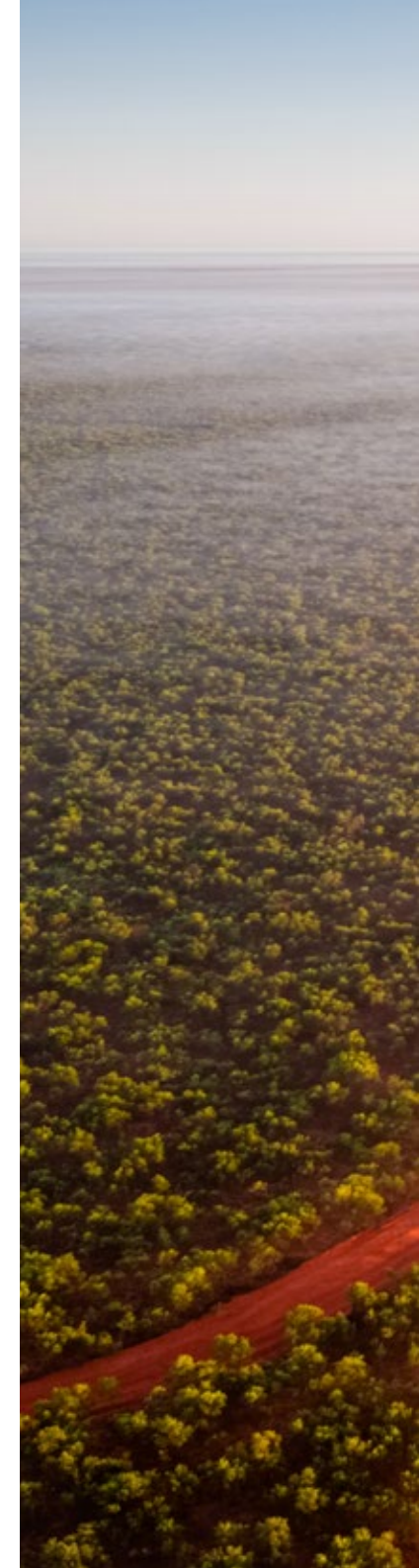
Previous international flight plans for RPT services connecting Port Hedland to Denpasar, and Karratha to Singapore, were suspended due to issues including COVID-19 and biosecurity threats. The potential to bring international visitors to the region via these routes is yet to be realised, and reinstating planning for them is an opportunity to increase international leisure visitation for the region over the next 10 years.

The Kimberley

Broome is the predominant airport in the Kimberley region, with numerous daily connections to Perth with Qantas and Virgin (two hours, 35 minutes) and Darwin with Airnorth via Kununurra (three hours). Connections to parts of the Pilbara and East Kimberley operate from Broome, while seasonal interstate services fly direct from Sydney and Melbourne in winter with Qantas. The loss of the direct flight between Broome and Brisbane in 2023 presents a challenge to attracting visitors from Queensland, and its reinstatement should be a priority.

Kununurra relies strongly on Broome and Darwin for local connections to interstate markets, but direct flights service the town from Perth. Funded airport infrastructure upgrades will allow larger aircraft to access Kununurra, presenting opportunities for additional direct routes to/from the east coast of Australia. Aviair provides scheduled services from Kununurra to both Kalumburu and Halls Creek. The Nexus Inter-regional Flight Network links Geraldton, Port Hedland and Broome, providing cross-regional visitation between the ANW subregions and ACC.

The addition of a seasonal international service between Broome and Singapore in June 2024, operated by Jetstar Asia, represents a significant opportunity for the region to capitalise on inbound high yielding travellers. Pre-COVID, domestic services between Melbourne and Kununurra were in planning and should be a priority moving forward.





PRIVATE VEHICLE

The Pilbara

The key sealed road access into the Pilbara is via the North West Coastal Highway 1, which tracks across the north of the region and into the Kimberley. Alternative access from Perth via the Great Northern Highway brings travellers into Newman (1,200 kilometres from Perth), with the road ultimately tracking north to Port Hedland and Highway 1 (1,600 kilometres). In Newman, there is also the option of the Marble Bar Road, which ultimately connects north to Highway 1, 40 kilometres east of Hedland. To the west of Tom Price, the Nanutarra Road on the Northwest Coastal Highway offers another connection towards Exmouth, Ningaloo and Coral Bay.

The complete sealing of the MRD Hwy from Karratha to Tom Price (250 kilometres) will provide a safer, time-saving option for many travellers visiting Karijini and Millstream Chichester national parks and is an opportunity for the region. Improvements to road quality in Karijini National Park have also been identified as an opportunity for the region over the next 10 years as this will provide growth opportunities for existing and new commercial products in the park, and provide a better visitor experience in the region's highest visited, and marketed, national park.

The Kimberley

Highway 1 connects the Pilbara to Broome (800 kilometres from Karratha). Two main routes feed across the Kimberley to Kununurra on the eastern side. The Great Northern Highway 1 continues near Derby and through Fitzroy Crossing and Halls Creek before reaching Kununurra (1,000 kilometres).

The alternate route is the Gibb River Road, partially sealed and viewed as a classic outback road and iconic road-trip. Looping across the northern section of the Kimberley — where the unsealed Kalumburu Road branches further north to the Mitchell Plateau and Drysdale River National Park — it passes Home Valley Station and El Questro on the way to Kununurra.

The Tanami Road is a 1,000 kilometre track stretching from Halls Creek to Alice Springs. Funding has been committed to seal the road, which will present tourism opportunities and open up attractions such as Wolfe Creek Crater, the second largest meteorite crater in the world, and the Warlayirti Artists, one of the most remote art centres in Australia.

In late 2020, the final section of the Cape Leveque Road was sealed to provide a fully accessible transport corridor from Broome to the northern part of the Dampier Peninsula.

The sealing of Cape Leveque Road created an easier drive route onto the Dampier Peninsula, a destination with high potential for tourism growth due to its unique and beautiful natural setting and large number of existing tour operators. Work is required to identify and address further priority road infrastructure gaps on the Dampier Peninsula that will enable the realisation of its tourism potential.

CRUISE

The Pilbara

Pilbara's cruise industry is in the development phase, with large cruise vessels having visited Port Hedland previously, and Dampier welcoming its first cruise vessel in 2023. A number of the high-yield expedition cruise lines are seeking opportunities in the Pilbara, especially Dampier.

The Pilbara region is in a good position to continue developing its cruise industry, leveraging off the unique coastline and island experiences it has to offer. When Murujuga National Park achieves UNESCO World Heritage status this will be another drawcard for cruise visitation to the subregion.

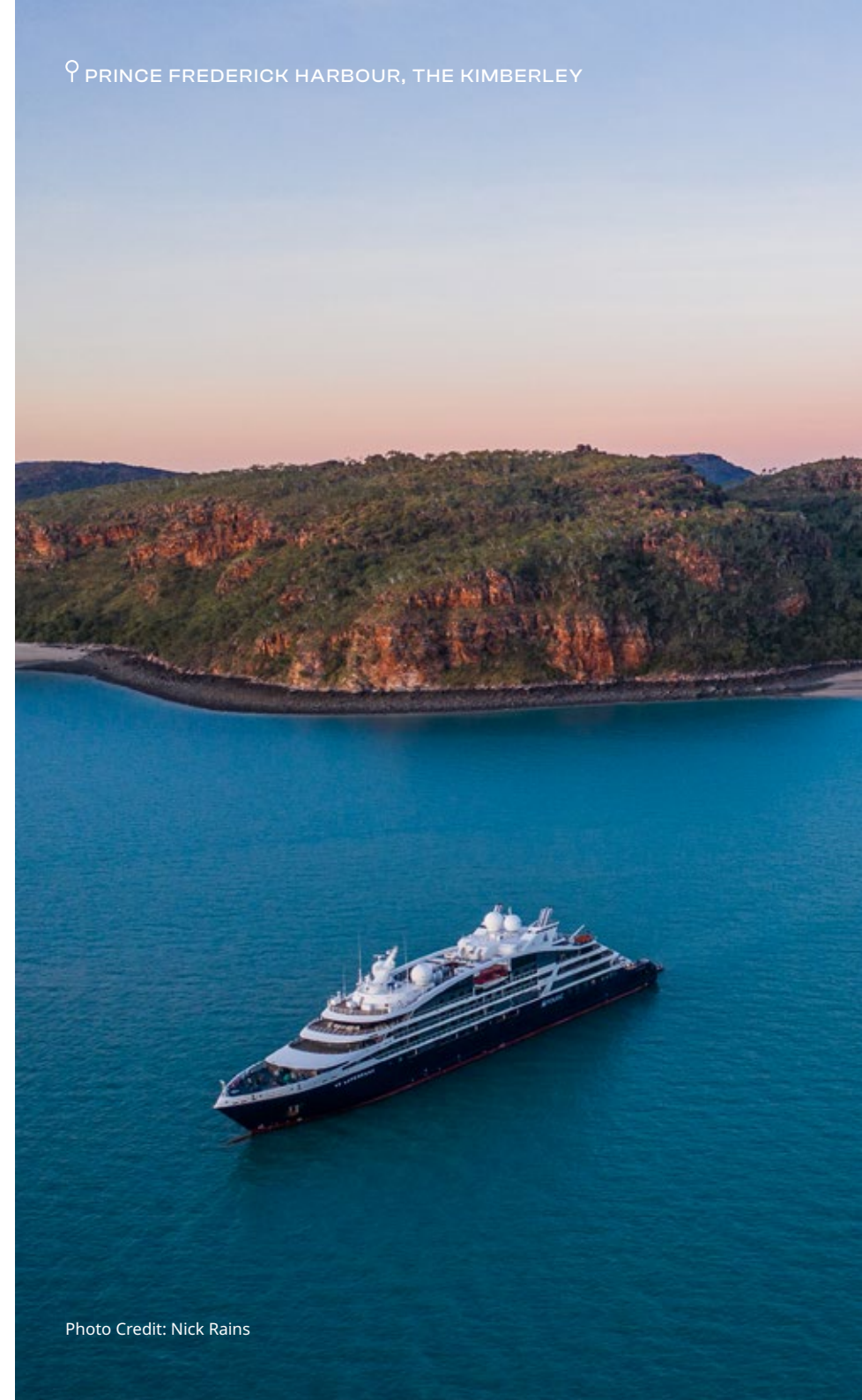
The Kimberley

Broome and the Kimberley see the most cruise activity for the ANW region, with Broome being the second most frequented port in WA. Large cruise vessels currently berth at the Port of Broome marine facility, however construction of the Kimberley Marine Support Base (KMSB) floating pontoon — expected in approximately 2025 — will increase Broome's attractiveness as a cruise destination. The KMSB's floating infrastructure will address tidal issues and will allow the region to attract a range of larger cruise ships.

WA's ability to grow its 'big ship' cruise tourism sector relies on the iconic regional destinations of Broome and Exmouth, providing a density of marquee ports on the long WA coastline. The KMSB is therefore a game-changer for the state's cruise sector.

An opportunity to support the addition of marine-tourism product and improved visitor experience has been identified in the development of a Broome boating facility and new Broome cruise passenger terminal.

The Kimberley is Australia's premier expedition cruising destination. Australian-owned quality cruise vessels have been joined by a flotilla of small, luxury international expedition ships, with between 35 to 300 guests, cruising the coast from Broome for multi-night itineraries through Kimberley waters or across to Darwin.





Wyndham's Port provides expedition vessels with safe berthing to enable bolt-on East Kimberley land-based touring. A shared understanding between TOs and the cruise industry on culturally and environmentally sensitive ways to manage the booking of iconic locations and land experiences, should be a focus in the short term to ensure Kimberley cruise experiences are sustainable.

RAIL

Rail services in the North West region are limited to private facilities only, utilised by resource sector bulk-carrying businesses. No public rail services are available.

PRIVATE TRANSPORT

Charter hire of private transport options are available, including specialist charter vehicles and aircraft options, such as small planes and helicopters. Small charter boats operate specialist services from key areas, with the potential development of the Broome boating facility offering a better user experience for both operators and visitors for this type of service.

COACH

Private coach services connect across the region, such as Integrity (Perth to Pilbara/Broome via Geraldton, Coral Bay, Exmouth, Tom Price, Karratha, Port Hedland) and Greyhound (Darwin to Broome via Kununurra, Halls Creek, and Derby). Journeys are subject to seasonal weather conditions, which can affect roads and passage of coaches.

ROAD-TRIP CONNECTIONS OF AUSTRALIA'S NORTH WEST

The roads of the North West cover vast distances. From Kununurra in the east, all the way past Onslow to the Exmouth Gulf covers over 2,000 kilometres, all connected by the Great Northern Highway and Northwest Coastal Highway that links the Savannah Way with Warlu Way. The Gibb River Road remains one of Australia's most iconic road-trip routes.

There is opportunity to realign Warlu Way in the Pilbara to include the soon-to-be-sealed MRD Hwy, which connects the dramatic gorges of Karijini National Park with Millstream Chichester National Park and the rock art of Murujuga National Park.

The sealing of Tanami Road will connect Halls Creek to Alice Springs, providing a second sealed interstate route for travellers into ANW and an additional sealed interstate route for the state, improving safety and hopefully mitigating the impacts should a road be closed or damaged due to flooding.

ACCOMMODATION

Accommodation refers to lodging options like hotels, resorts, caravan parks, campgrounds and short stay rentals. It is essential for tourism as it provides a comfortable base for visitors to explore the region's attractions.

Accommodation infrastructure drives destination development, attracting more tourists and encouraging investment. Good accommodation enhances visitor experiences and satisfaction. It also has significant economic importance, generating revenue, creating jobs, and stimulating other sectors. The availability and quality of accommodation can influence the length of tourists' stays, leading to increased spending and benefiting local businesses.

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

ANW WIDE		
BROOME	THE KIMBERLEY	THE PILBARA
<p>Accommodation in ANW is generally older and skews towards independently owned commercial accommodation, with 45 independent hotels compared to 13 chains. ANW has minimal luxury accommodation offerings, highlighting a gap in the current offering.</p>		
<p>Accommodation in Broome is a strong mix of upscale balanced by some midscale options (six upper upscale, six upscale, four upper midscale, six midscale and private short stay options). New investment in a range of accommodation types would strengthen Broome's tourism offering and allow it to cater for increases in visitation.</p> <p>As a tourism destination that can cater for HYTs, Broome currently has a gap in its luxury accommodation offering with a need for international luxury brand operations.</p> <p>Approximate total of 1,434 beds and 220 private short stay homes/rooms.</p>	<p>A wide range of accommodation is available in the Kimberley to suit various visitor needs (one economy, five midscale, two upper midscale, four upscale, three upper upscale and private short stay options). A small number of deluxe accommodation offerings form part of a larger mixed offering with shared facilities.</p> <p>The Kimberley is home to some of WA's iconic outback accommodation offerings, including El Questro and Berkeley River Lodge.</p> <p>Approximate total of 802 beds and 30 private short stay homes/rooms.</p>	<p>Accommodation is generally comprised of one to three-star (eight economy, 11 midscale, five upper midscale, two upscale and private short stay options).</p> <p>The Pilbara has the highest number of beds which can be attributed to the dominance of business travellers to the region.</p> <p>Approximate total of 2,726 beds and 36 private short stay homes/rooms.</p>

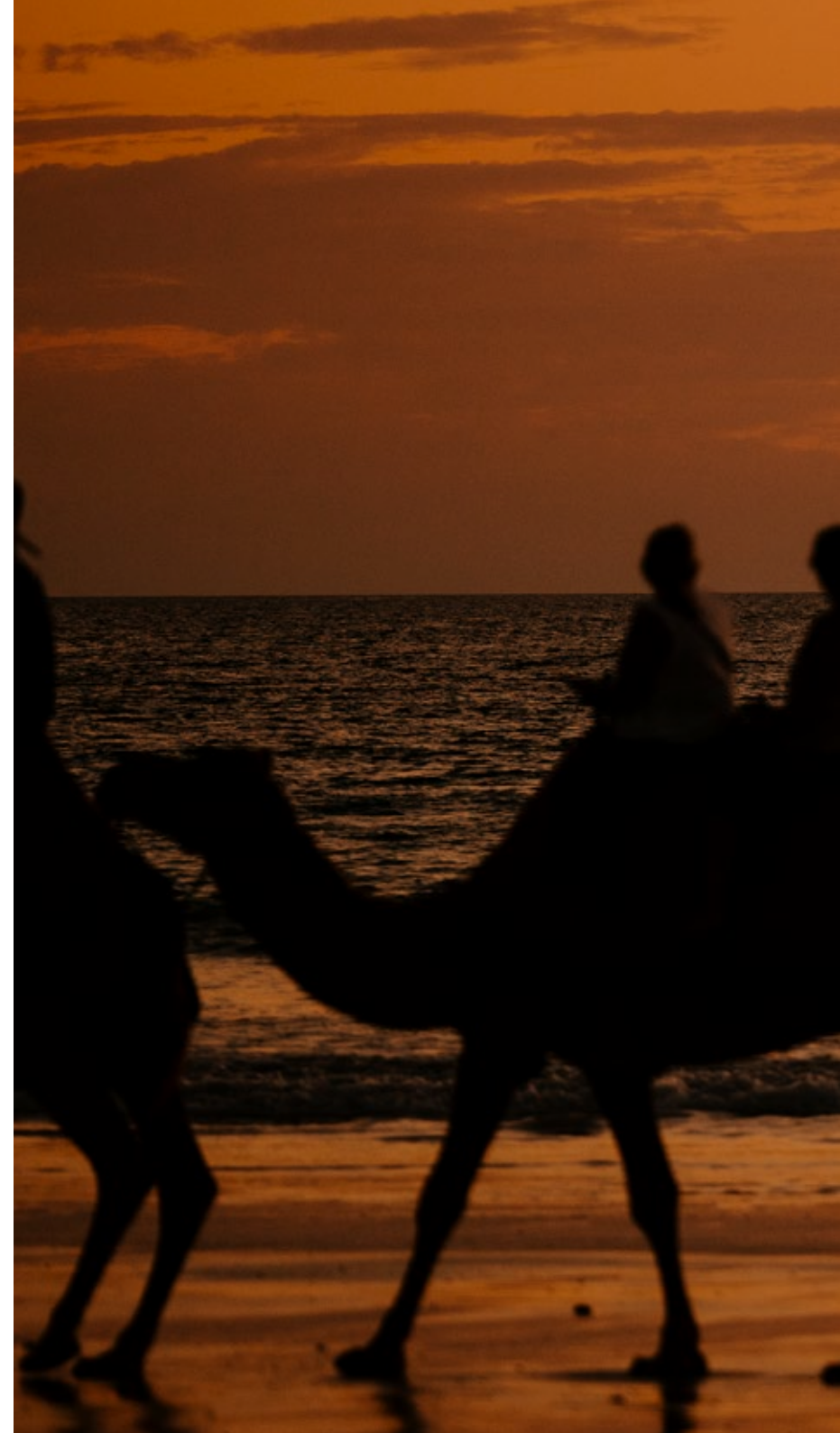
Table 1: ANW accommodation profile (2022)



ACTIVITIES, ATTRACTIONS & EVENTS

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

The following is an outline of the ANW region's currently marketed attractions, activities and events which inform the destination development pillars for each of the subregions in the ANW region.





ACTIVITIES & ATTRACTIONS

The ANW region has over 260 tourism operators, accommodation providers, hospitality venues, attractions and events. The tourism products and experiences which are most prevalent are those linked to natural attractions and related experiences, adventure and Aboriginal culture.

THE KIMBERLEY	BROOME	THE PILBARA
Adventure tours	Adventure tours	Adventure tours
Natural environment	Natural environment	Natural environment
Aboriginal culture	Aboriginal culture	Aboriginal culture
Hiking	Pearling tourism	Hiking
Wildlife	Wildlife	Wildlife
Water-based activity	Water-based activity	Water-based activity
National and marine parks	Marine park	National and marine parks
Outback experience	Outback experience	Outback experience
Dark sky tourism	Retail (Broome)	Industrial tourism
Multicultural/heritage tourism	Dark sky tourism	Dark sky tourism
Retail (Kununurra)	Multicultural/heritage tourism	Multicultural/heritage tourism
Experiential accommodation	Experiential accommodation	Retail (Karratha/Port Hedland)

Table 2: Activities and attractions of ANW



EVENTS

Events play a valuable role in adding vibrancy to a destination, giving visitors a reason to make a time-certain decision to visit, disperse across the region or stay an extra night in a location. Established major event activities across the region, such as Ord Valley Muster, Shinju Matsuri and, to a smaller extent, the Karijini Experience, each play a role in supporting visitation to the subregions. These are the larger-scale activities that attract State Government support because they play a role in attracting visitors and connecting to local audiences in their home regions.

Various smaller events underpin these larger activities and are funded with grants and sponsorship. Typically, these are activities that are either community focused, or participation activities. There is room for growth in the mid-tier event sector. New offerings such as Taste of the Kimberley provide the potential to leverage food and agricultural offerings through a visitor-friendly platform while also building trade-based economic outcomes.

DEVELOPMENT PILLARS

The following development pillars have been selected to delineate essential areas of focus for the sustainable growth and success of the ANW tourism destination. A desktop analysis of the existing activities, attractions and events, identified areas with potential for growth and development and highlighting signature opportunities that can attract HYTs to a destination. Strategic marketing efforts should effectively capitalise on these opportunities, leveraging their unique characteristics to bolster the destination's competitive positioning and appeal.

ACTIVITIES, ATTRACTTIONS & EVENTS	THE KIMBERLEY	BROOME	THE PILBARA
NATURE/BIODIVERSITY	S	S	S
ABORIGINAL CULTURE	S	S	E
HERITAGE	D	S	D
ADVENTURE	S	S	E
EVENTS & FESTIVALS	E	S	E

LEGEND

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

Table 3: Development pillars ANW

**PART 3:
INSIGHTS INFORMING THE TDMP**





DESTINATION MATURITY OF ANW SUBREGIONS

The destination maturity of the ANW subregions has been determined through analysis of the current visitor economy, market awareness, access, accommodation, activities, attractions and events. According to Butler's Tourism Area Life Cycle Model (1980), tourism destinations go through different stages of maturity, including exploration, involvement, development, consolidation, stagnation, and decline or rejuvenation. A mature tourism destination typically exhibits a well-established and diverse range of offerings, well-developed tourism infrastructure, and effective destination management practices. Understanding the maturity level of a destination helps in identifying its strengths, weaknesses and potential areas for improvement to attract visitation and ensure the sustainability of the tourism sector. Figure 2 identifies and assesses the destination maturity of the subregions in the ANW region, identifying the areas required for improvement to enable the subregions to move upwards in the life cycle model.



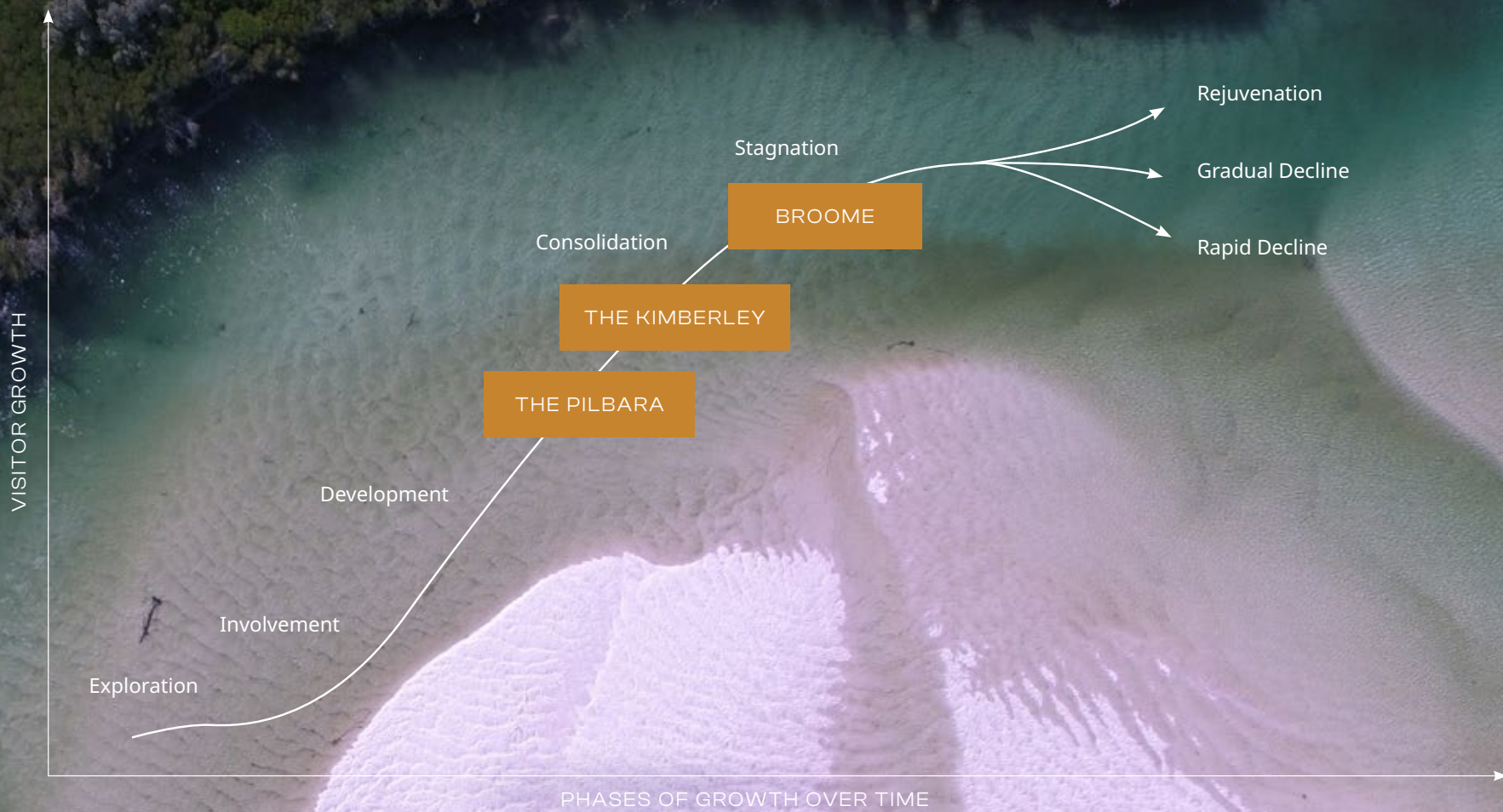


Figure 2: ANW tourism destination life cycle Model Source: Butler (1980)

SUBREGIONAL TRANSITIONS

BROOME: CONSOLIDATION TO REJUVENATION

Broome is the most developed of the three subregions of ANW, with the region's most diverse and leisure-focused accommodation allocation. As a result of the historical investment, Broome is the central point of leisure visitation.

However, the area has reached a point where further investment in accommodation and attractions is required to meet customer demand, especially in the high-yielding visitor segment where customers are seeking a full-service, immersive and unique experience.

The return of cruise shipping has already been identified as a significant pressure point regarding accommodation availability and quality. This pressure extends beyond accommodation, with concerns of over-tourism due to expedition vessels visiting prime locations such as Raft Point and Montgomery Reef. Further strategic investigation and development of the cruise, expedition and superyacht vessel industry is required to ensure natural and cultural values are protected, and that the visitor experience to popular locations aligns with these values.

This requires close consultation with key

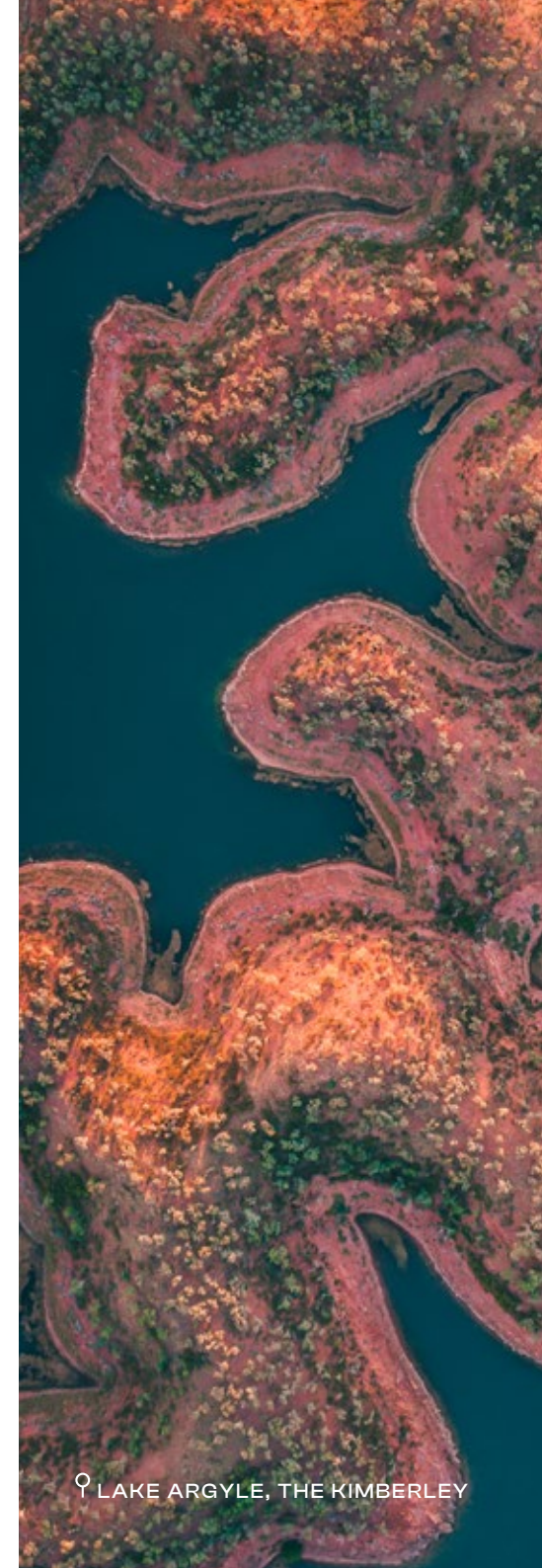
stakeholders such as TOs and relevant government departments.

To help facilitate growth in Broome and the Dampier Peninsula, the focus needs to be on improving road access throughout the subregion (with a focus on Dampier Peninsula); enhancing existing product offerings; improving the accommodation options; ramping up Aboriginal tourism capability in both Broome and the Dampier Peninsula; and building a coordinated destination marketing program for Broome as a critical hub of activity and a starting point for dispersal into the surrounding region.

The growth of Aboriginal tourism will benefit from WAITOC's Aboriginal Tourism Accelerator program. Ongoing engagement with Aboriginal tourism operators will be key to developing the region in a manner that benefits all parties.

Consideration of the best approach to staffing shortages is needed. COVID removed international and interstate visitation for a period, and stripped the area of vital seasonal workers to support the tourism and hospitality sectors. This has had ongoing impacts on the tourism industry's capacity and capability, with efforts needed to stabilise the tourism workforce and provide worker accommodation to assist this.

Without this foresight and planning, Broome risks stagnated visitor growth.





THE KIMBERLEY: DEVELOPMENT TO CONSOLIDATION

There remains a strong level of interest in the Kimberley experience, particularly from interstate and international visitors.

Considerable pressure was exerted on the tourism industry in 2020–21 due to the impact of COVID on travel and the tourism workforce, in 2022 due to dealing with a backlog of COVID-affected bookings, and in 2023 with the impact of the Kimberley floods.

Investment in accommodation, facilities and tourist attractions is required to attract new audiences of interstate and international visitors after years of disruption. However, increases in worker availability is also required to ensure that high customer service standards are met.

The Designated Area Migration Agreements (DAMA) program in place under the East Kimberley Chamber of Commerce is now able to provide benefits for the East Kimberley region, with plans to broaden this to the ANW region.

While some premium tourism experiences exist in the Kimberley region, HYTs have high expectations.

Investment in new or revamped facilities is vital to offer customers a full range of options, but this needs to be matched by high service standards.

Good quality road connections across the region remain important. The Savannah Way concept presents an opportunity to position a connected route for travellers across Australia's north, while encompassing the Gibb River Road as a Kimberley-specific attraction that appeals to adventure audiences.

Improvements to infrastructure, a range of accommodation options, greater awareness of the destinations, and an increase in authentic Aboriginal tourism offers are key to further developing the Kimberley's visitor economy.

THE PILBARA: DEVELOPMENT TO CONSOLIDATION

The Pilbara offers diverse natural attractions, from offshore islands and coastal destinations to striking inland gorges and waterways. Intricately bound together with the land and water are the visible history of the earth and the interactions of Aboriginal people within their environment, seen in the petroglyphic art which abounds across the region.

Karijini National Park is marketed as the Pilbara's hero destination and as one of the ANW region's icons. It holds great interest for interstate and overseas visitors. This popularity has placed pressure on existing infrastructure to continue to provide quality visitor experiences. Upgrades to access are planned, however, there is a clear need for more visitor infrastructure, accommodation and activities.

A small amount of tourism products is established with a broader range of offerings in the planning and development stage. Over the next 10 years, significant investment in tourism must occur for these new tourism offerings to take root and grow.

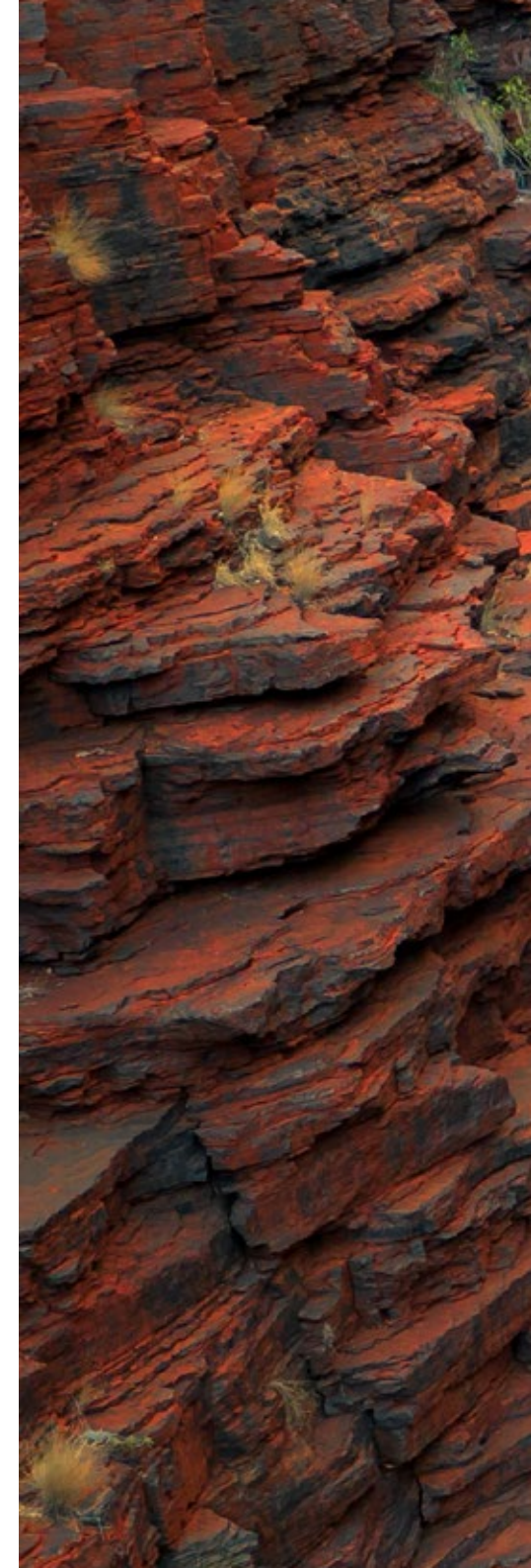
Unlike other parts of the ANW region, the Pilbara has extensive resource industry activity which affects investment in the visitor economy and restricts workforce and accommodation availability.

The dominance of this sector also impacts consumer awareness and perception; meaning the Pilbara is not seen as a tourism destination. These factors influence investment attraction in the tourism industry.

Improved infrastructure will help to ease the challenge of accessing the region's tourist attractions, aligned to increased awareness of the MRD Hwy and the wider Warlu Way network as attractive tourism connector routes. There is potential in developing existing and new accommodation and attraction facilities to align with this, with significant opportunities across Aboriginal tourism, marine, and adventure experiences. Marketing to the self-drive, self-catering tourism market will capitalise on and support visitation to the region.

Premium tourism experiences connecting Murujuga National Park to Millstream-Chichester and Karijini National Parks will facilitate new opportunities for authentic Aboriginal tourism, nature-based and agritourism product development. Murujuga National Park itself has been proposed as a World Heritage Site and is awaiting ratification.

Other accommodation and attractions along connecting routes and near parks could offer alternative options, including station stays, campgrounds, hotels and other activations.





TRENDS & FOCUSES

GROWTH IN SELF-DRIVE

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

People increasingly seek to avoid dense, crowded spaces, which presents a major competitive advantage and unique selling point for regional destinations like ANW (Source: ANW Consumer Insights Research 2022). Owners of newer vans are less interested in low amenity parks which charge high prices for a basic, crowded site and instead prefer niche campgrounds such as Gnoorea, Cleaverville, Cape Keraudren, or station stays such as Cheela Plains.

There is a clear need to distinguish the traditional grey nomad audiences, who were often economy travellers, from the new, much wealthier seniors and family groups who are boosting a range of regions. ANW needs to maximise the value of this critical sector through infrastructure development and targeted marketing strategies.

ABORIGINAL TOURISM

The worldwide interest in Indigenous travel experiences is growing. The State Government is committed to the growth of Aboriginal tourism in Western Australia, as outlined in the Jina Plan, delivered in conjunction with WAITOC. The sector provided over \$63.8 million to the Gross State Product in 2021–22.

Aboriginal tourism is a central pillar and differentiator for the state's tourism offer, with over 80 per cent of visitors professing an interest in participating in an Aboriginal tourism experience. However, only 17 per cent can undertake an experience for several reasons, such as lack of product availability or lack of available time. It is essential to match products to the right markets, as interest varies by audience.

The ANW region already has a competitive advantage in Aboriginal tourism because of the number of Aboriginal tourism operators in the region. Maximising awareness of the range of products, and continuing growth of the industry, will benefit the ANW region and enable it to compete with the Northern Territory, which is considered WA's major competitor in this market.





ACCESSIBLE & INCLUSIVE TOURISM

The need to provide greater accessibility to tourism destinations and attractions is growing. In Australia, approximately two million people with limitations or disabilities travel for leisure, plus a similar number who act as carers. TRA data in 2018 estimated that 20 per cent of the Australian population had a disability or long-term health condition and, by 2050, more than a quarter of the population will be aged 65 or over.

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

WORKPLACE CHANGES

Tourism operators in the ANW region rely heavily on working holiday makers/backpacker visitors for their seasonal workforce. The tourism sector is also in competition with the higher wages offered by the mining industry. In the Pilbara, this is a significant issue for tourism development, with the resources sector being so dominant. The need for affordable housing and growth in population in the regions also impacts upon workforce availability.

The ANW region may be an attractive destination for business-leisure/“b-leisure” or “workcationers” where working from home translates to ‘working away from home’. Employers have recognised that there is an opportunity for staff to work outside the office regularly, but services such as reliable internet and phone coverage are vital for this to occur.

This audience presents a potential new niche market of young, digital nomads who can spend longer exploring and working. However, the key is the ability to connect online, with Starlink and similar platforms now beginning to enable almost entirely seamless connectivity, even in the most remote areas in the region.

This extends to self-drive family groups and slightly older travelling workers, who seek to work if there are facilities where they can locate themselves at an acceptable cost, with facilities and online connections.

DARK SKY TOURISM

Research undertaken in 2021 by Tourism WA showed that dark sky tourism has a strong appeal amongst domestic audiences, especially alongside nature/wildlife and other outdoor experiences.

The ANW region, with its expansive open spaces, offers outstanding dark sky viewing and night-time spectaculars such as the Staircase to the Moon. The 2023 Total Solar Eclipse in Exmouth, demonstrated the attraction of these events and their value to regions. In July 2028, another solar eclipse will cross the Kimberley region around Wyndham and Kununurra, which creates significant opportunities to attract visitors to the region to enjoy stunning viewing conditions.

The opportunity also exists to further enhance the experience by integrating Aboriginal storytelling, adding greater depth and variety to the offer.

WILDFLOWER TOURISM

The wildflower visitation market presents the opportunity to link into the relevant areas of the region and offer another reason for visitation or activities to do, to extend a stay or promote dispersal.

AGRITOURISM

Agritourism has an emerging place in the diversified visitor economy. Tourism WA's research from late 2021 identified a level of appeal in some audience segments of the domestic market for station stays across the ANW region, combined with the attraction of natural gorges and pools nearby. This adds greater variety to the ANW accommodation portfolio.

Pearling farm tours are also offered in Broome, diversifying the offer of the region and providing a uniquely ANW agritourism experience for visitors.

INDUSTRIAL TOURISM

The appeal of industrial tourism is growing, especially in the US, Europe and Japan, with interest in operational and heritage industrial locations.

The Pilbara has major industrial locations with tourism offerings, including Port Hedland Harbour Tours, the FMG facility, and Rio Tinto's Dampier Salt and Tom Price mine tours. In Newman, BHP operates mine tours, including at Whaleback, the second-largest open-cut mine in the southern hemisphere.

Advances in science and technology provide new potential streams of interest in industrial tourism. Currently, only the North West Shelf Project Visitor Centre offers an understanding of the complex new developments currently being undertaken by industry.

GEOTOURISM

Geotourism, focused on landscapes and geology provides great diversification in the region, with picturesque locations such as Purnululu, Mitchell Falls, Windjana Gorge, Cockburn Range, Marble Bar and the wider Pilbara, all with the potential for increased visitation.

Unique meteorite impacts sites such as the Hickman Crater and Wolfe Creek Crater also encourage visitor dispersal. The sealing of Tanami Road will bring more traffic to the doorstep of Wolfe Creek National Park, presenting an opportunity for additional geotourism activities in this area.

Western Australia is internationally significant for its variety of stromatolites, the oldest living lifeforms on the planet. Fossils of the earliest known stromatolites, about 3.5 billion years old, are found near Marble Bar in the Pilbara. Fossilised stromatolites are found throughout the East and West Pilbara, from the Kimberley to the west coast.

There is significant opportunity for the region to raise awareness and develop product that attracts visitors to these unique geological attractions.



ADVENTURE TOURISM

The ANW region possesses outstanding hiking trails and cycling opportunities ranging from short-distance activities to multi-day itineraries.

There are also a variety of adventure-based destinations such as Gibb River Road and the challenging cycle ride event; Cable Beach; Lake Argyle, that offers a participation swim event that sells out each year; outback stations such as Cheela Plains and Pardoo; and numerous gorges and parks.

Fishing tours and charters present another opportunity for enthusiasts, especially in the waters of Onslow, Karratha/Dampier (Billfish Shootout), Mackerel Islands (Seafari), Montebello Islands, and charters out of Broome, Derby, Wyndham and Kununurra. A balance is required in the creation and promotion of marine parks where commercial fishing is prohibited in sanctuary zones. This can be managed through clear communication to visitors seeking this experience.

ECOTOURISM

Ecotourism encompasses all nature-based forms of tourism in which the tourists' main motivation is the observation and appreciation of nature and the traditional cultures prevailing in natural areas. Major online booking agents such as Trip.com now have over 10,000 eco-friendly travel product offerings on their platform. There are over 30 ECO Certified operators in the ANW region, the largest concentration of offerings in WA, outside of the Perth and south-west areas.

SUSTAINABLE TOURISM

Combined with the move towards nature-based tourism experiences, modern day travellers have high expectations of the sustainable credentials of both destinations and experiences. Consumers place greater importance on climate change impacts, and how destinations approach the sustainability of their tourism offer on local communities, economies and the environment.

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

CONSUMER INSIGHT RESEARCH SUMMARY

A tailored consumer research study was designed and undertaken across key markets to gain in-depth insights into potential target audience awareness and perceptions of ANW and their propensity to travel. These markets were residents of WA (excluding those residing within the ANW tourism region), Sydney and Melbourne.

A tailored consumer research study was designed and undertaken across these markets to gain insights into potential target audience awareness and perceptions of the ANW region, their propensity to travel and the awareness and appeal for key locations and attractions throughout the region.

To complete the survey, Dynata respondents had to:

- Be over 18 years of age;
- Have a household income of \$90,000 or higher;
- Live in Sydney, Melbourne, Perth or other areas of Western Australia, excluding the Kimberley, the Pilbara or Broome;
- Be likely to take travel domestically for leisure in the next 18 months; and

- Consider Western Australia as a leisure/holiday destination.

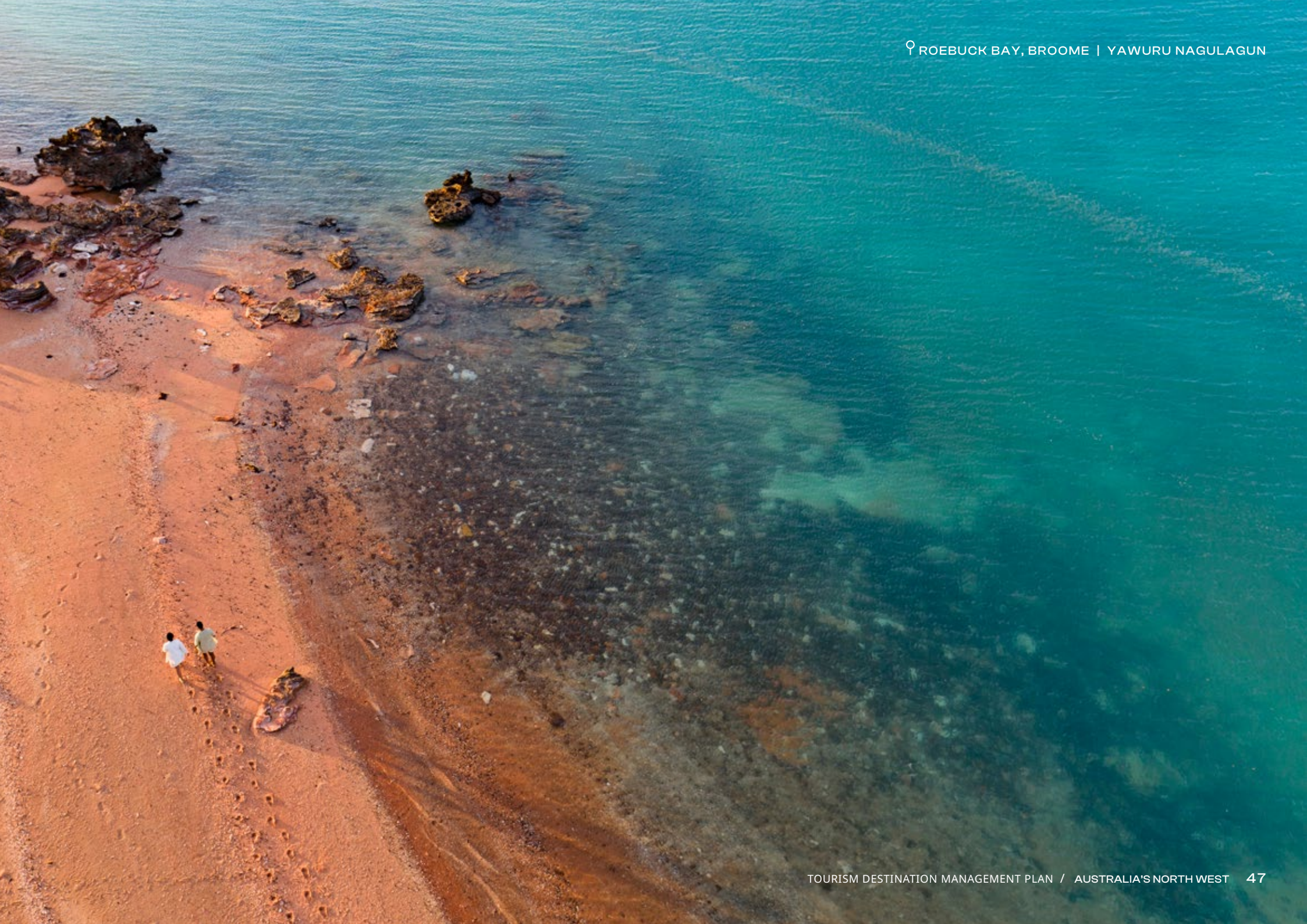
The total sample size was 1,163. This generates a margin of error of ± 2.8 per cent at the 95 per cent confidence level.

The numbers of respondents from each of the three locations were as follows:

- Sydney n=388 (margin of error of ± 4.9 per cent at the 95 per cent confidence level taken on its own).
- Melbourne n=389 (margin of error of ± 4.9 per cent at the 95 per cent confidence level taken on its own).
- Western Australia n=386 (margin of error of ± 4.9 per cent at the 95 per cent confidence level taken on its own)
 - Perth n=325
 - Other areas of Western Australia (excluding ANW) n=61

The research period commenced on 1 July 2022 and was completed on 8 July 2022.





KEY RESEARCH FINDINGS

Most Western Australian, Sydney and Melbourne residents want to travel, and WA is on their lists of potential leisure destinations.

- WA is undoubtedly on the consideration list of Western Australian, Sydney and Melbourne travellers. WA also had three of the top five regional destinations of choice for Sydney and Melbourne residents. Broome was third and the Kimberley fifth, behind the Great Barrier Reef and Margaret River. The Pilbara was ranked 13th, which is still ranked above Darwin, Byron Bay, Alice Springs and Bali.

Interstate awareness of the ANW region and what it has to offer is low, and work needs to be done to improve this.

- There are some awareness issues. Only one third of respondents from ANW's key visitor source markets of WA, Sydney and Melbourne could correctly identify that "Australia's North West" represents the Kimberley and Pilbara regions, including Broome.
- The breakdown shows that awareness in WA for ANW and its subregions is 58 per cent. For Sydney and Melbourne, this drops to 28 per cent. 25 per cent of Melbourne and Sydney respondents were unsure what ANW referred to.
- Key awareness requirements need to be defined to increase the appeal and, ultimately, visitation.

- Key road-trip journeys for ANW, like Savannah Way and Warlu Way, are also little known. 60 per cent of respondents were unaware of the Savannah Way, and an even higher 70 per cent were unaware of the Warlu Way. Less than five per cent of respondents were very aware and have travelled there.

ANW can deliver the locations and experiences Australians are looking for — but there are issues to address first.

- Western Australian, Sydney and Melbourne residents want to relax and unwind, try new and unique experiences, enjoy outdoor activities and be among nature, and embrace local experiences. They also want travel experiences that are value for money, involve nature/natural beauty, have quality accommodation, and offer a range of tourist attractions. Water, coastal or pristine beaches are also valued highly, as are safety and security. Over 25 per cent want remote wilderness destinations, which presents a significant opportunity, while coastal/beach and nature-focused destinations are ranked number one and four, respectively.
- There are some key barriers to overcome besides awareness which may be addressed through education and marketing to the right markets. ANW is perceived to be expensive so the region needs to be able to show value for money. While remoteness appeals to some, it must be articulated that ANW is not too far away or difficult to get to and is also easy to explore. Itineraries should be designed for the three most preferred holiday trip lengths.





Broome and the Kimberley hold strong appeal and Broome is well known. The Pilbara requires work to raise awareness of the available attractions and activities.

- There is a strong appeal for Broome and the Kimberley. The Kimberley received a very high Net Promoter Score (NPS)¹ as, once people experience it, they love it. Broome is well-known and the Horizontal Falls is appealing. Broome has some challenges around cost and service levels. The Pilbara is seen as being remote, costly and too far away. It also does not appear to be known for unique experiences. Greater awareness is needed for Karijini, dark sky tourism, and the Pilbara's coastal/marine tourism opportunities.
- All destinations suffer from a lack of awareness of the available activities and attractions. However, there is a general understanding that there are state and national parks, beaches, wildlife, Indigenous experiences, gorges and water holes. These are seen as uniquely Western Australian but cost, remoteness and being hard to get to are vital issues impacting future tourism and visitation.

There is high interest shown for Western Australia as a potential leisure destination for both interstate and intrastate residents.

- WA is rated highly as a potential leisure travel destination by consumers from its key domestic visitor source markets, representing high potential for visitation.
 - 88 per cent of interstate respondents are prepared to consider WA as a potential leisure destination.
- Of just 12 per cent of interstate respondents who would not consider WA as a potential leisure destination, the main reasons were as follows:
 - 39 per cent - cost of travel to Western Australia
 - 31 per cent - preference for overseas travel
 - 26 per cent - not interested in Western Australia
 - 24 per cent - too expensive
 - 24 per cent - nothing much to do

These responses provide some guidance on the key barriers to address in any future marketing activity, noting this was a multi-response question.

¹ NPS is a measure used to gauge customer loyalty, satisfaction and enthusiasm with a company that's calculated by asking customers one question: "On a scale from 0 to 10, how likely are you to recommend a product/company/destination/experience to a friend or colleague?" The NPS is simply the percentage of customers who are promoters (those who scored 9 or 10) minus the percentage who are detractors (those who scored 0 to 6) Those who score 7 or 8 are considered passives and are neither promoters nor detractors.

KEY TRAVEL ATTITUDES & PREFERENCES

When travelling for leisure, most participants in the survey indicated that they travel with their partner or spouse (61 per cent), or with friends (23 per cent). However, families with either school-aged children (29 per cent) or preschool children (16 per cent) are still two other key groups to consider. The potential focus markets for future visitor types to ANW appears to be mainly couples and groups of friends, and this is a market looking to escape from the big cities and who generally have more money to spend. This does not rule out families with children, but families require options and activities that are uniquely attractive to this cohort.

The preferred times of year for leisure travel are during spring (31 per cent) and over the summer holiday period in December/January (29 per cent). However, 20 per cent of respondents have no time of year preference or prefer to travel outside school holidays (18 per cent), compared with during school holidays (15 per cent).

There are some significant opportunities for ANW to grow the 21 per cent of respondents who prefer to travel during ANW's low season over summer and also the 31 per cent and 21 per cent who like to travel over ANW's shoulder season of September to November, and March to May, respectively.

Potential "workcationers" require reliable internet and a destination that appeals. 31 per cent of respondents would look to undertake a workcation, while another 12 per cent would consider the possibility. Key target markets are Perth, Melbourne and Sydney residents who can work remotely, and only those destinations with reliable internet should be promoted.

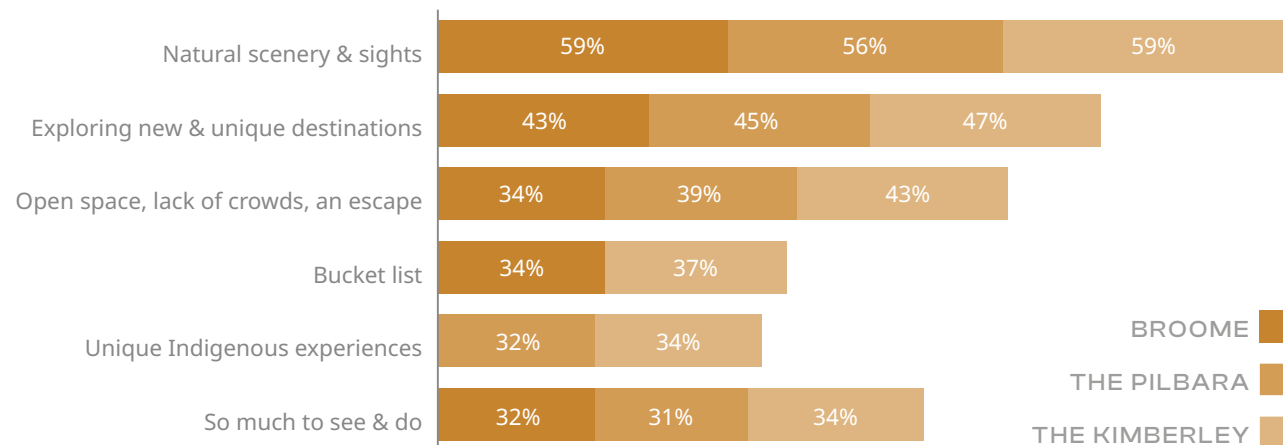
📍 PURNULULU NATIONAL PARK, THE KIMBERLEY



KEY REASONS: RATED APPEALING

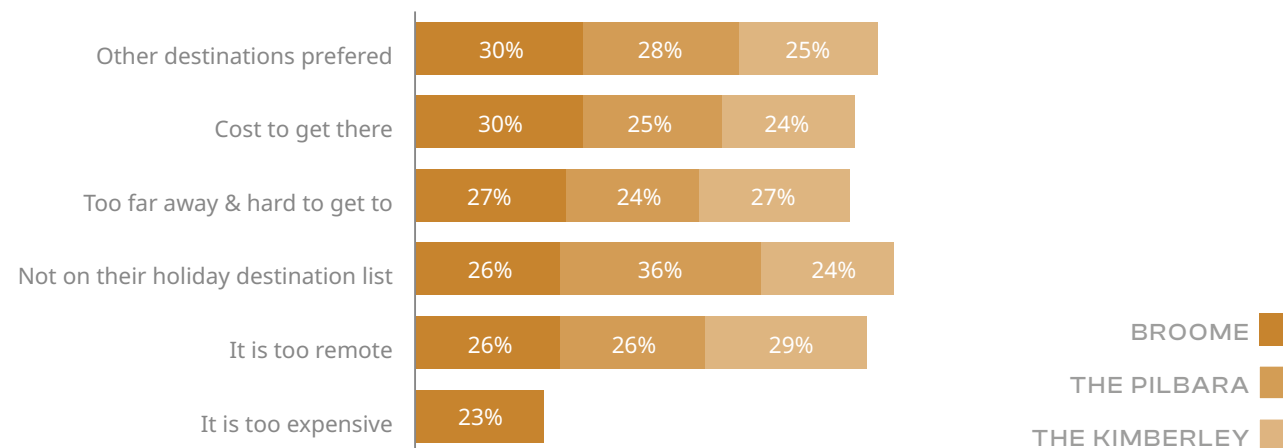
Respondents were asked about how appealing each destination was for a leisure holiday. Broome was ranked high at nine or 10 by 32 per cent, the Kimberley was rated high by 29 per cent, while 22 per cent rated the Pilbara as high.

Note: the insights to the left were based on multi-response questions in the survey.



KEY REASONS: RATED NOT APPEALING

Respondents who did not think Broome (30 per cent), the Pilbara (39 per cent) or the Kimberley (31 per cent) was appealing were asked why. Their main reasons were:



INTERNATIONAL MARKET INSIGHTS

Tourism Australia Future of Demand Research: ANW Region Analysis

The Research

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

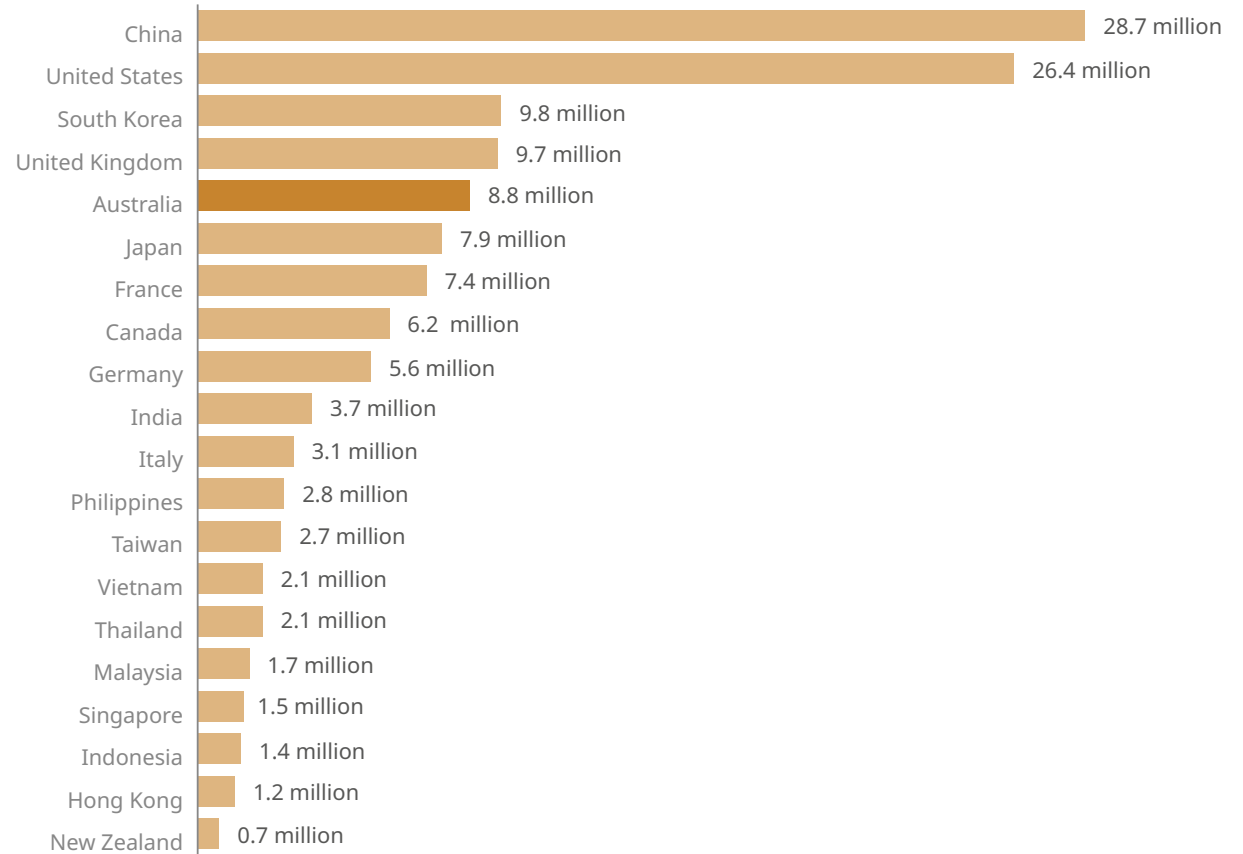
The Method

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

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

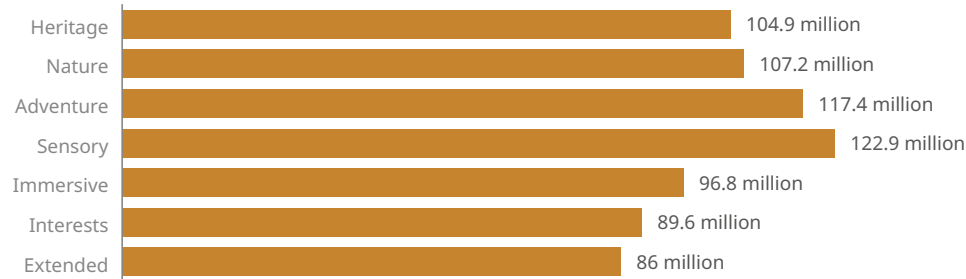
It actively assessed stakeholder knowledge, published documentation and online conversations to provide a foundation to build hypotheses that were then validated through quantitative survey processes.

ANNUAL OUT-OF-REGION TRAVELLERS TO AUSTRALIA



GLOBAL (excl. AU) 125 million

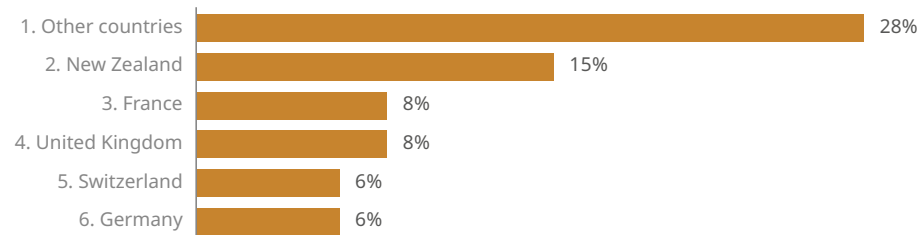
EXPERIENCE SECTORS & SIZE OF MARKET INTEREST



Refer to pages 54 – 56 for a breakdown of each experience sector.

ANW INTERNATIONAL MARKETS

International market visitor breakdown (2023)



HERITAGE EXPERIENCE SECTOR

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

Top heritage markets:

For German travellers the activity of highest appeal in this sector is visiting Indigenous sites.

The ANW region has diverse Aboriginal tourism offerings, from cultural tours to the Camping with Custodians' experience of staying on Aboriginal lands. Marketing and development of these experiences could attract a further German market.

Other markets to consider:

Travellers from Indonesia and Thailand also identified these types of experiences. Although not current markets for the ANW region, they could be attracted to visit on the Singapore to Broome Jetstar Asia service.

Sites of historical significance interest travellers from Italy and Germany, with museums and galleries also of interest to Italian travellers, both of which the ANW region offers.

NATURE EXPERIENCE SECTOR

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

Top nature markets:

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

The ANW region's breathtaking natural landscapes should be highlighted to a German audience, specifically areas like Karijini National Park, the Bungle Bungles, and Kununurra waterfalls. This, alongside wildlife experiences like turtle kayaking, ocean charters for whale watching, and the Malcolm Douglas Crocodile Park, will work to increase visitation from this segment.

Other markets to consider:

Indian travellers possess a strong interest in birdwatching. Malaysian travellers rate highly for seasonal natural events. This could present an opportunity to promote events such as wildflower season and the Staircase to the Moon.





ADVENTURE EXPERIENCE SECTOR

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

Top adventure markets:

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

The ANW region has a vast array of tracks and trails for the German traveller to hike and walk, such as Karijini National Park, Millstream-Chichester National Park, Prince Regent National Park, Mitchell River National Park and Purnululu National Park. There are a range of cycling opportunities across the region including fat biking in Broome, however, there is limited access to bike hire throughout the region.

The adventure activity of highest appeal for the French traveller is four-wheel driving/off-roading.

As a region of big landscapes, adventure travel such as four-wheel driving is a key part of access to tourist attractions and a must-do activity for visitors seeking to explore. Promoting iconic drives like Gibb River Road, and driving along Cable Beach could attract further French patronage.

Other markets to consider:

Future markets to attract, based on the existing offering are Hong Kong, which has a strong interest in campervan trips and Italy for their interest in charter flights.

SENSORY EXPERIENCE SECTOR

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

The top overall sensory experience for travellers is dining out, with 13 countries listing it as their highest-ranked activity. This is a barrier across the ANW region, with limited dining options available. Food and beverage festivals or markets should be considered to combat this issue in the interim. In the long-term, significant investment into the viability of and support of hospitality venues in the region is needed.

Beaches are a top activity for visitors from both the United Kingdom and France. Both are primary markets for ANW and would be influential segments to target with beach drive itineraries.

IMMERSIVE EXPERIENCE SECTOR

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

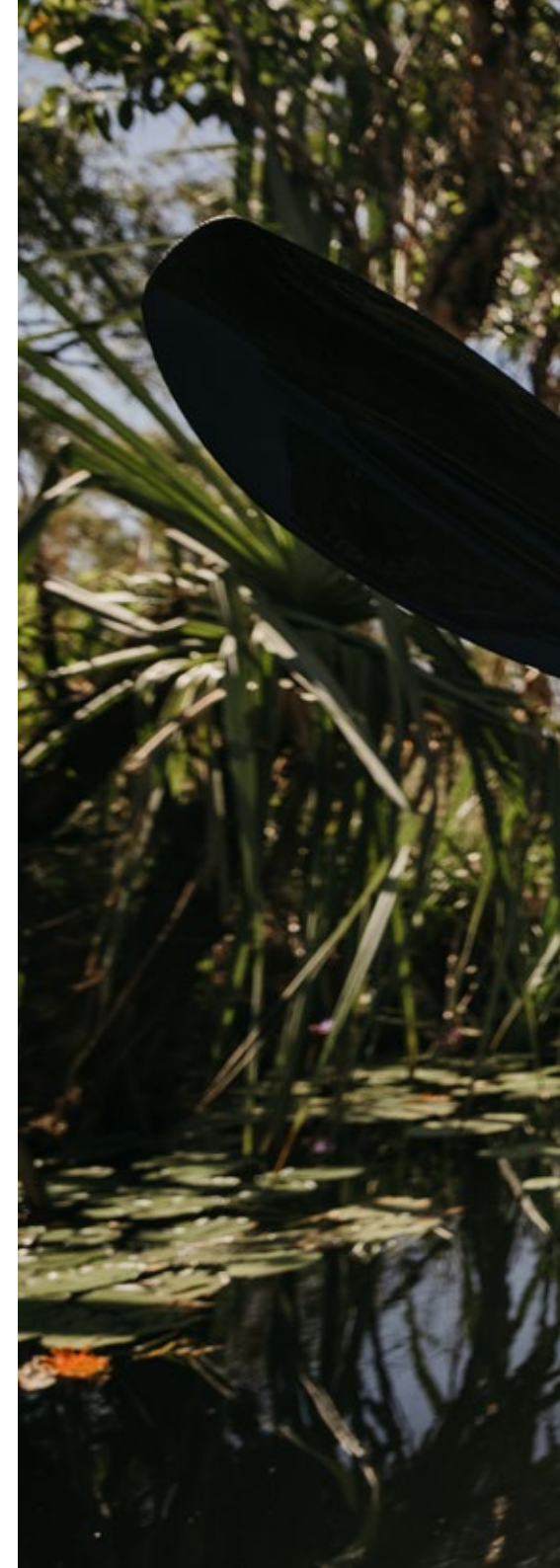
For the Singapore traveller, the activity of the highest appeal is farm experiences.

Western Australia has a high density of Singapore travellers. Singapore is an untapped market for ANW; this could be addressed through a targeted campaign highlighting the adventure and immersion of a station stay experience.

INTEREST EXPERIENCE SECTOR

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

The most popular interests are shown to be photography and stargazing, appealing to travellers from Thailand and South Korea. These are not active markets for ANW but could be targeted through photography and night-sky touring. ANW has a unique advantage because there is minimal light pollution, providing optimum conditions for dark sky tourism experiences.





DOMESTIC MARKET INSIGHTS

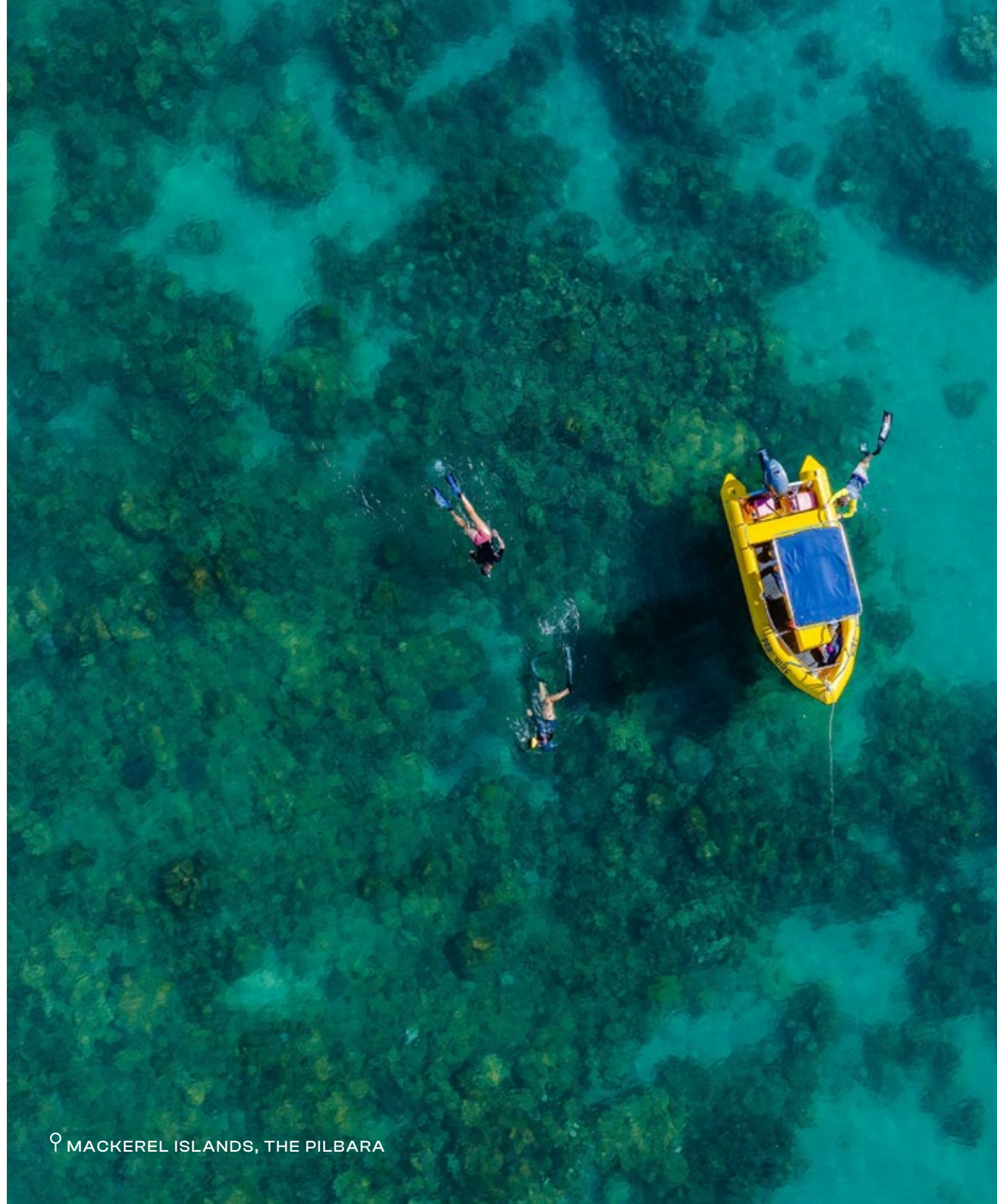
Tourism WA Domestic Segmentation Model

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

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

This tool is used to inform supply and demand-side decisions by identifying the destinations and/or product mix that appeals to the different segments, particularly in targeting HYTs. The marketing and product development opportunities and key infrastructure projects over 10 years for ANW have been aligned to each domestic trip segment, as outlined below.

This demonstrates that the priority projects and opportunities for the ANW region predominantly target the Premium Nature (PN), Simple Nature (SN), Family Time (FT) and Luxe Culture (LC) segments through the existing mix of nature-based, luxury, family-friendly, and cultural and Aboriginal tourism projects.



PREMIUM NATURE

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

Average spend: \$332 per person per night.

Marketing and product development opportunities:

Attracting PN trips represents a significant opportunity for the ANW region. As the segment with the highest spend, marketing and product development should be focused on developing campaigns and experiences that align to the popular activities that define PN trips, including immersive nature, unique experiences and wildlife, pristine coastlines, and Aboriginal experiences. The ANW region already offers these activities, and so experience development and service standards that align with the desires of the HYT is an opportunity to increase the yield of the tourism industry.

The Kimberley region captures PN trips from the interstate and intrastate markets, highlighting market awareness of its PN experiences. Kununurra in particular has a very high NPS for its experiences but additional food and beverage, bookable experiences (particularly in Aboriginal tourism) and luxury accommodation would be required to grow the number of PN travellers.

The Pilbara needs to develop awareness and desire for its unique experiences, which is currently a barrier to it capturing any premium nature travellers. Targeted tourism development will create more interest for this segment. Karratha should be a focus of deluxe/luxury accommodation development to service established and developing natural attractions such as Karijini, Murujuga and Millstream Chichester national parks.

Murujuga National Park has been nominated for UNESCO World Heritage listing, which will support the case for Pilbara as a premium nature destination.

Broome has some deluxe accommodation and food and beverage options to suit PN travellers. There is opportunity for its trade friendliness to increase and for the development of additional luxury, full-service accommodation.

SIMPLE NATURE

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

Average spend: \$121 per person per night.

Marketing and product development opportunities:

Capturing SN trips is a lower priority for ANW, a segment with low spending. However, the ANW region's natural assets make it an ideal destination for SN travellers, particularly those willing to go further for unique experiences.

Popular elements of SN trips are unspoilt nature, road-trips, and immersion in nature and wildlife. These are all similar elements to a PN trip, however, SN travellers are looking for a lower-budget version with camping as a popular accommodation option.

ANW can leverage its vast unspoilt nature to capture SN trips. The significant crossover between PN and SN travellers means that this segment could be leveraged to spend more on the luxury elements in ANW's offering, once introduced through a SN trip.

FAMILY TIME

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

Average spend: \$172 per person per night.

Marketing and product development opportunities:

Capturing FT trips is a lower priority for ANW as a segment with lower spending per person. Popular elements of an FT trip that the ANW region offers include pristine coastlines, the potential for adventure activities such as fishing, and immersive nature, which can be leveraged to capture additional trips.

Onslow, Karratha and Broome could target marketing to this segment around the pristine and unique coastlines that encompass the Mackerel Islands, Dampier Archipelago and Dampier Peninsula, with a focus on family friendly activities available.

Broome captures FT trips due to its positioning as a relaxing beachside destination and these assets can continue to form part of marketing to attract this segment.

LUXE CULTURE

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

Average spend: \$230 per person per night.

Marketing and product development opportunities:

Broome is in the top three destinations for an LC trip for intrastate markets. As a high-spending segment, capturing additional LC trips would benefit ANW/Broome.

To address the needs of this segment, highlighting the ease of getting around, sights and activities (with a focus on luxury), festivals and luxury accommodations will be key.

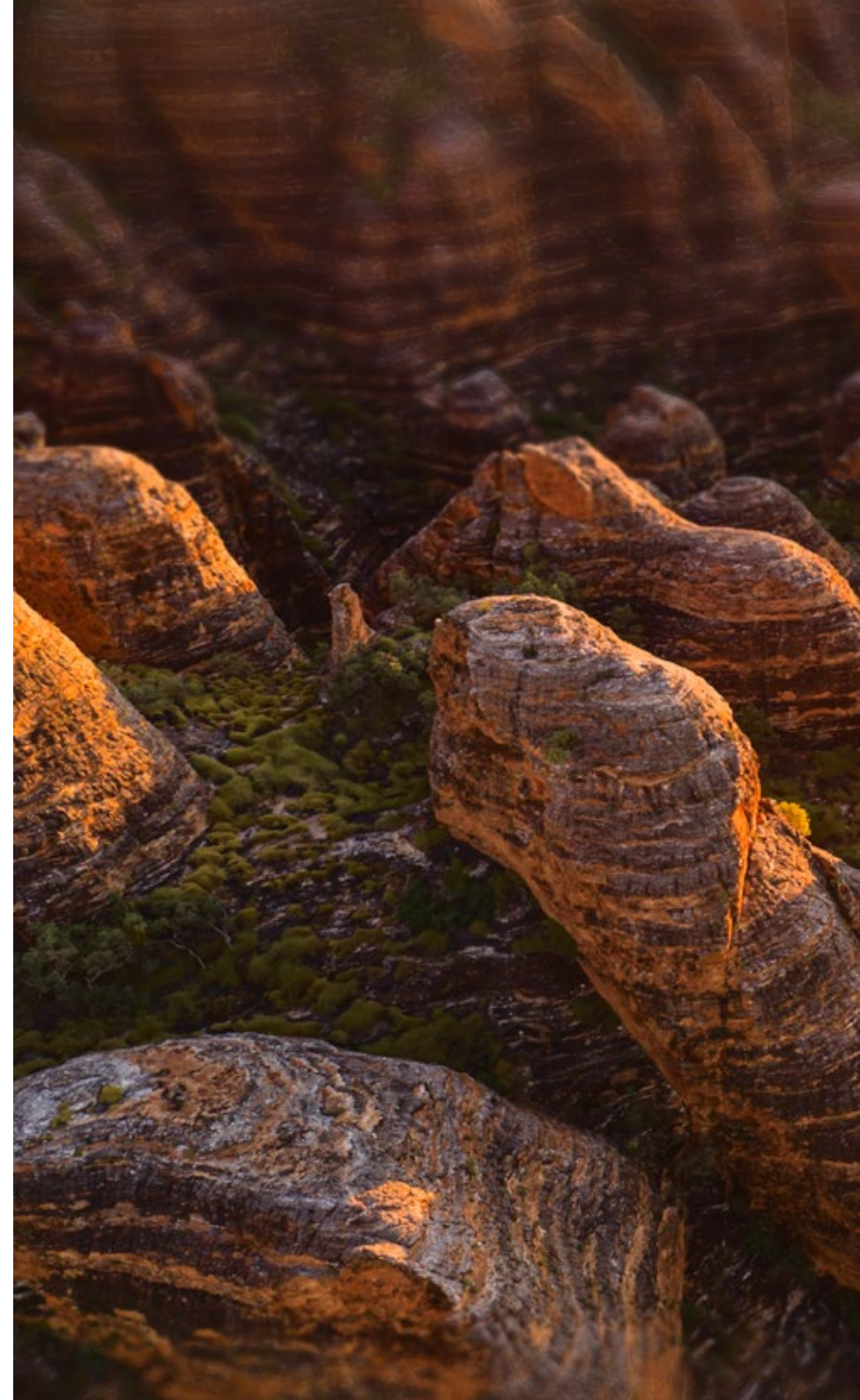
Once new visitors can be attracted to a destination, these trip-takers will continue to revisit. Marketing to those who have experienced Broome before is a valuable way to attract repeat visitation.

Cruise shipping is a popular activity for those who take LC trips. Leveraging the cruise and expedition vessels that explore Broome and the Kimberley coast will attract these travellers to the ANW region.



OPPORTUNITIES & CHALLENGES

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





SUPPLY

To position the ANW region as the leading destination for Aboriginal tourism, nature-based tourism, and adventure activities, it is crucial to align investment in products with these development pillars. This presents a significant opportunity for the region to enhance its visitor economy.

In the medium to long-term, investing in the expansion of accommodation and products throughout the region will enable visitors to explore a wider range of unique environments and towns that ANW has to offer. Improving overall tourism amenities in smaller towns is essential to enhance the visitor experience across the ANW region.

Several infrastructure projects in progress offer significant tourism opportunities if leveraged effectively. These include: the sealing of major routes such as Tanami Road and MRD Hwy; the addition of Aboriginal tourism products and accommodation development in Murujuga, Millstream Chichester and Karijini national parks; and the development of marine and cruise tourism infrastructure. These initiatives will facilitate further growth of the industry.

The combination of the sealing of MRD Hwy and developing corresponding products in Murujuga, Millstream Chichester and Karijini national parks will encourage visitor dispersal in the Pilbara region, alleviating pressure on Karijini National Park, which is currently operating at capacity. However, it is crucial to develop and promote the Millstream Chichester and Murujuga national parks, to mitigate potential additional pressure resulting from the newly sealed route. By leveraging this route, along with the established route between Exmouth and Karijini National Park, awareness of Pilbara as a tourism destination can be elevated. Implementing visitor support structures, such as one-way car hires and campervan rentals at airports and dispersal points, will further encourage cross-regional visitation.

The sealing of Tanami Road requires further investigation and engagement with TOs to ensure its recognition and strategic planning from an early stage. This involves promoting opportunities to grow products and local businesses that would appeal to leisure visitors using the road. Priority should be given to sealing Tanami Road, as it serves as a secondary interstate access route into the the ANW region region and the third access route for Western Australia.

The importance of having alternative transport routes was highlighted during the Kimberley floods, which disrupted traffic on the only access road between the Northern Territory and the Kimberley region.

Refreshing assets in key locations such as Broome and Karijini is essential to prevent stagnation as tourist destinations. Recent investments by the Shire in Broome's China Town and the Walmanyjun Cable Beach Foreshore Redevelopment provide opportunities for activation. This may include adding retail, food and beverage options, organising events, and introducing new activities to attract visitors.



Opportunities

- Increasing the capability and capacity of regional airports to support new domestic and international connections to allow direct flights into the region, reducing travel time for key markets having to fly through Perth.
- Investment attraction in new accommodation, particularly in the high-end and self-drive sectors and in workers accommodation.
- Additional Aboriginal tourism assets, including the iconic anchor attractions of the Murujuga Tourism Precinct and Living Knowledge Centre and an Aboriginal cultural centre in Broome.
- Development of an iconic walking trail in the Kimberley.
- New events throughout the region and expanded capacity of existing major events.
- Addition of one-way self-drive itineraries and one-way vehicle rental opportunities.
- Leveraging proposed or planned additional sealed road infrastructure throughout the region, including MRD Hwy, Tanami Road, Banjima Drive, Snappy Gum Drive, Marble Bar Road, Lake Argyle access road and boat ramp, and Dampier Peninsula arterial roads.
- Activation of sealed Lake Argyle boat ramp infrastructure to support growth in operators and events.
- Redevelopment of Warlu Way infrastructure and brand assets to incorporate new sealed roads and be a visitor-focused asset.
- Improved town amenities throughout the region to improve the overall tourism experience.
- Activating high-visitation national parks through signature attractions, experiences and/or accommodation, including, but not limited to, the Murujuga, Millstream Chichester, Karijini, Purnululu, Danggu Geikie Gorge national parks.
- Maximising tourism opportunities when new tourism infrastructure is developed at Cable Beach Foreshore, KMSB, Broome Boating Facility and Port Hedland Spoilbank Marina.
- Establishing Broome as a first port of entry location by sea and air.
- Product development that is in keeping with product development pillars to create a cohesive tourism destination.
- Installation of electric vehicle and helicopter infrastructure to improve sustainability credentials of the region.



- Establishing a cruise vessel booking system for the high-demand Kimberley coastal cruise locations.
 - Establishing additional Aboriginal-run shore-based excursions on the Kimberley coast to service the expedition cruise market.
- Challenges**
- Need for wider accommodation offering across all standards. This is currently limiting market growth and is hindered by land tenure and complex planning regulations for tourism development.
 - Lack of new/refreshed local attractions and economic viability of new product development for private sector.
 - Need for greater range of Aboriginal tourism product.
 - Access to land for cruise operators, particularly in the Kimberley region.
 - Lack of booking system for iconic coastal attractions for the cruise sector.
 - Limited aviation routes and services.
 - Low rate base for some areas, limiting local government investment into tourism development and marketing.
 - Lack of amenities, restaurants, cafes and retail opportunities in most of the region.
 - Tourism accommodation at capacity due to resources sector block-booking rooms.
 - Workforce accommodation shortages impacting ability to attract workers.
 - Seasonal tourism industry limiting viability of investment.
 - Unsealed or poorly maintained road connections limiting visitor dispersal options.
 - Some destinations experiencing overtourism, such as Karijini National Park, and the need to increase awareness of range of options.
 - Ensuring that any future visitor pass program secures optimal cultural, economic and social outcomes for Aboriginal people and is integrated in a timely manner for the tourism sector.

📍 ROEBUCK BAY, BROOME | YAWURU NAGULAGUN

DEMAND

An essential demand-related focus to deliver marketing efficiency and brand awareness of the region is to increase consumer awareness of existing products and dispersal methods available to visitors, and combat the perceptions around the region's size and the distance between attractions. This includes promoting the Gibb River Road, Savannah Way and Warlu Way as iconic road-trip journeys and highlighting Karratha as a critical hub for dispersal into the Pilbara region and its products.

The need for consolidation of the regional and subregional brands and propositions was highlighted in the ANW Consumer Insights Research 2022, which emphasises ANW's unique selling point of unique natural settings and the need to emphasise this in communications.

The high prices of airfares and accommodation due to high demand and low availability, along with the perceived and actual costs of visiting the region, will remain significant challenges unless addressed effectively through marketing. Collaborating with other regional tourism organisations and offering incentives to leisure travellers on domestic airline routes can expand the reach of ANW's marketing efforts, combat price barriers and encourage new and repeat visitation.





Opportunities

- Increase promotion and awareness of the Gibb River Road, Savannah Way and Warlu Way as iconic road-trip journeys.
- Increase awareness of Karratha as a key hub for dispersal into the Pilbara region with a focus on Murujuga National Park and Millstream Chichester National Park product when developed.
- Increased collaborative marketing activity with bordering RTO marketing agencies and membership organisations such as WAITOC.
- Support incentivisation of leisure travellers on domestic airline routes across all subregions of ANW, where supply of accommodation allows growth of visitor numbers.
- Addition of food and art itineraries to support dispersal and increase awareness of the range of products.
- Utilise ANW Consumer Insights Research 2022 to provide customer-led insights into branding and marketing activities.

- Highlight the unique opportunities of the region and value for money proposition to offset the challenges presented by cost.
- Capitalise on the exceptional luxury expedition cruise sector experiences offered on the Kimberley coast to target HYTs.
- Promote the unique experiences that can be had in low and shoulder season, such as green environment and flowing bodies of water.

Challenges

- High prices of flights and accommodation due to high demand and low accommodation availability.
- Low awareness of the subregions and key attractions and visitor routes in interstate markets.
- Cost is seen as one of the significant barriers for consumers.
- Social challenges and their potential impact on brand and reputation.

CAPABILITY

Tourism workforce and capability shortages are currently a major challenge for the ANW region, and for the tourism industry throughout the state. Continued skills shortages have broad impacts on the sector by reducing operator capacity to deliver consistent standards of service and increasing the difficulty of attracting new investment. These factors have flow on effects, and must be addressed to balance the supply and demand requirements of the industry.

As a region with a limited tourism season it is also important to continue efforts to extend the seasons for tourism businesses, which will increase the overall sustainability of the industry. This can be achieved through coordination of demand and supply efforts, such as building infrastructure that can withstand varied seasons, new product development that isn't impacted by seasonal weather changes, and targeted marketing campaigns that attract visitors in the low season.

Other capability factors impacting the ANW region are the mounting effects of environmental and social pressures. Travellers have become increasingly conscious of their environmental impact and are actively seeking out sustainable tourism experiences.

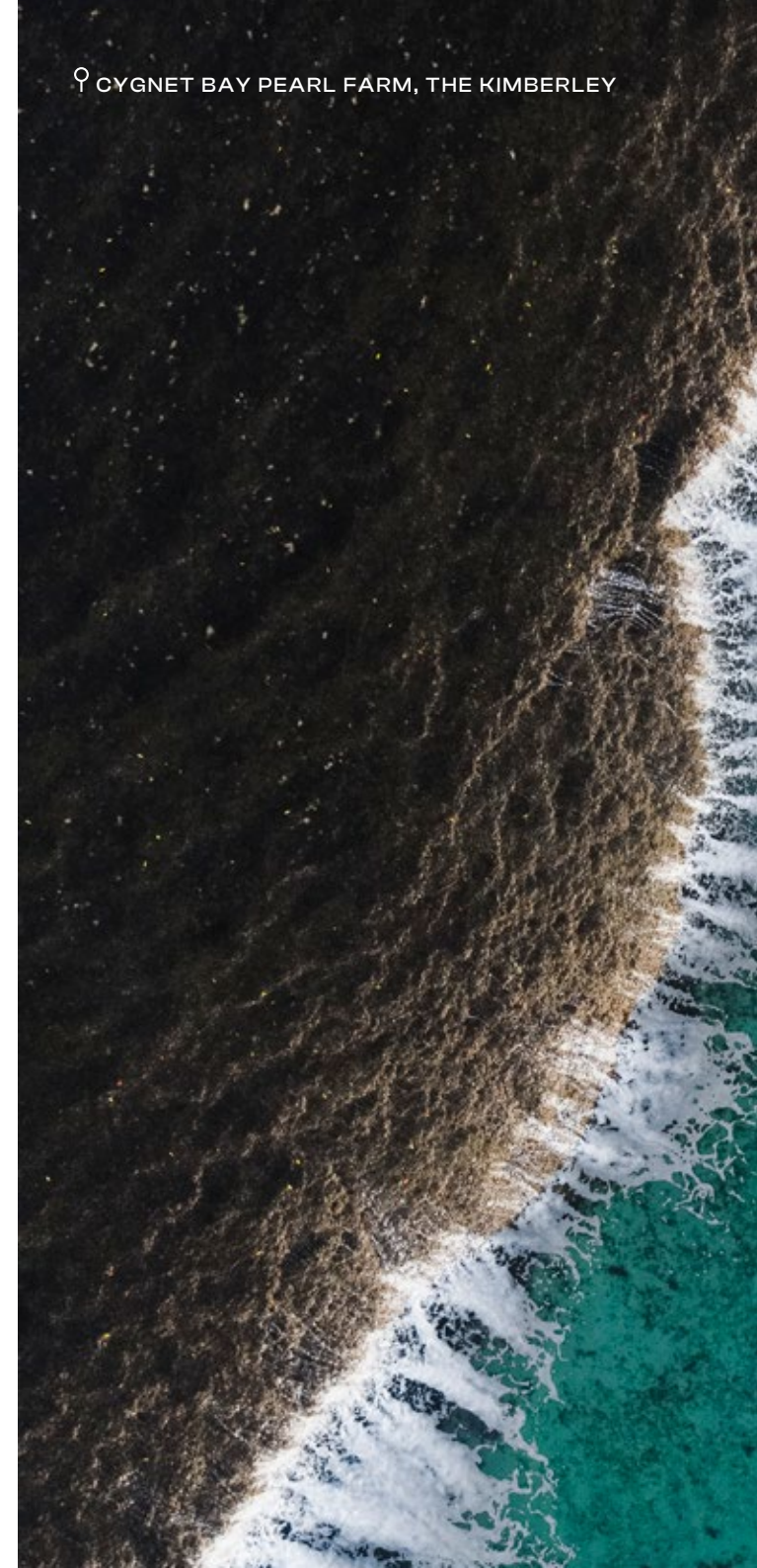
It is important to raise awareness of and implement sustainable practices and promote the available certifications for tourism businesses that can attract a growing segment of environmentally conscious travellers.

The development of visitor infrastructure that supports environmentally friendly practices, such as electric vehicle charging, will also have a positive impact.

As a region susceptible to environmental challenges, growing capability in this area is very important.

Social challenges are also impacting the region which has flow-on effects to the tourism industry. Addressing these will require an all-of-government approach.

Events in the region require a coordinated effort to achieve a regular North West calendar of events that can grow the length of season and sustainability of the tourism industry. Coordinating events across the region and working with LGAs, tourism businesses can leverage the collective marketing power to attract more visitors. This approach can also create efficiencies in event planning and organisation.





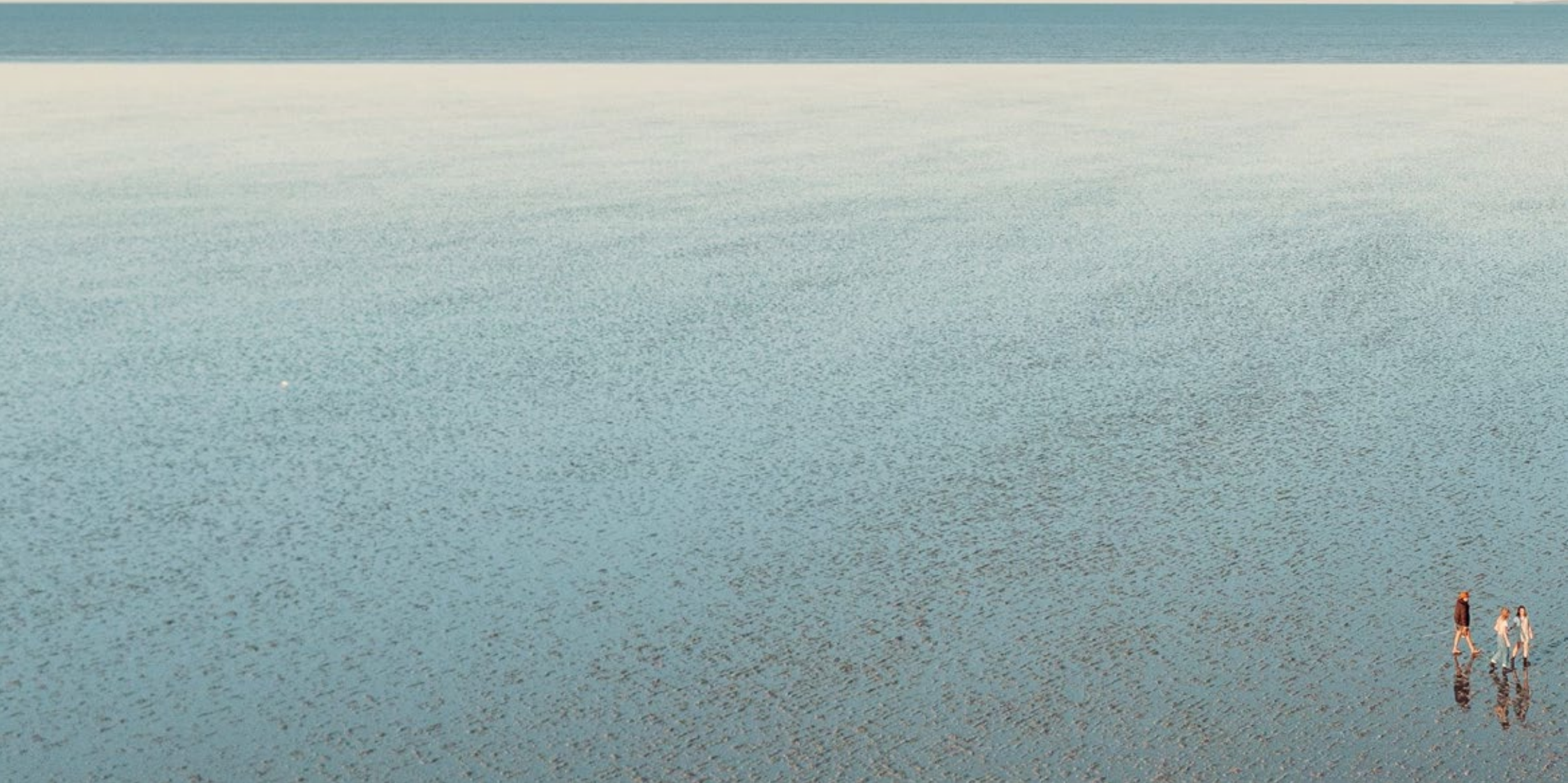
Opportunities

- Support for operators with eco-certifications to grow the region's sustainable offerings.
- Create a region-wide, coordinated approach to events with relevant RDCs and LGAs.
- Work with industry and event organisers to provide increased quality of tourism experiences for visitors.
- Work with major stakeholders to establish a coordinated approach to staff attraction and retention.
- Increase the length of the tourism season through focused tourism product development and marketing.
- Growth of electric vehicle infrastructure on major visitor drive routes where viable, including consideration of electric helicopter infrastructure.

Challenges

- Many tourism businesses are focused on immediate results and may not have the resources or time to plan for the long-term. Natural disasters (e.g. flooding) have exacerbated this.
- Quality of hospitality offering is limited due to staff shortages and lack of in-region skills training.
- The implementation of visitor pass programs can be complex and time-consuming. These systems require coordination between different businesses and stakeholders and may require significant investment.
- Many tourism businesses are unable to attract and retain staff with the necessary skills and experience, exacerbated by affordable housing shortages in the region.

PART 4: STRATEGY & IMPLEMENTATION





PRIORITY PROJECTS

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





INVESTMENT IN EXPERIENTIAL ACCOMMODATION

APPROACH

Targeted investment in national parks and the vast wilderness area found throughout the ANW region will provide visitors additional opportunities to experience the natural beauty of the region, which is a key visitation driver. Forward planning is required for new accommodation investment in high-visitation national parks and locations that are currently nearing or at capacity. Investment into a range of experiential options, including luxury and eco-style accommodation offerings for HYTs, should be considered when developing accommodation.

RATIONALE

There is a shortage of appropriate visitor accommodation in the ANW region's national parks and surrounds, and the vast and varied wilderness that can be found throughout ANW is a unique selling point for the region.

ACTIONS

- Explore and progress opportunities through the National Park Tourism Experience Development Program for the development of unique and signature accommodation in or near national parks.
- Support accommodation development at Karijini, Millstream Chichester and Murujuga national parks, and encourage development to be experiential in style.
- Investigate opportunities for accommodation development along key touring routes, such as Gibb River Road, which are in keeping with the environment.
- Support the growth of station stay/agritourism opportunities in suitable locations.



DEVELOPMENT & ACTIVATION OF PLANNED KUNUNURRA AIRPORT INFRASTRUCTURE

APPROACH

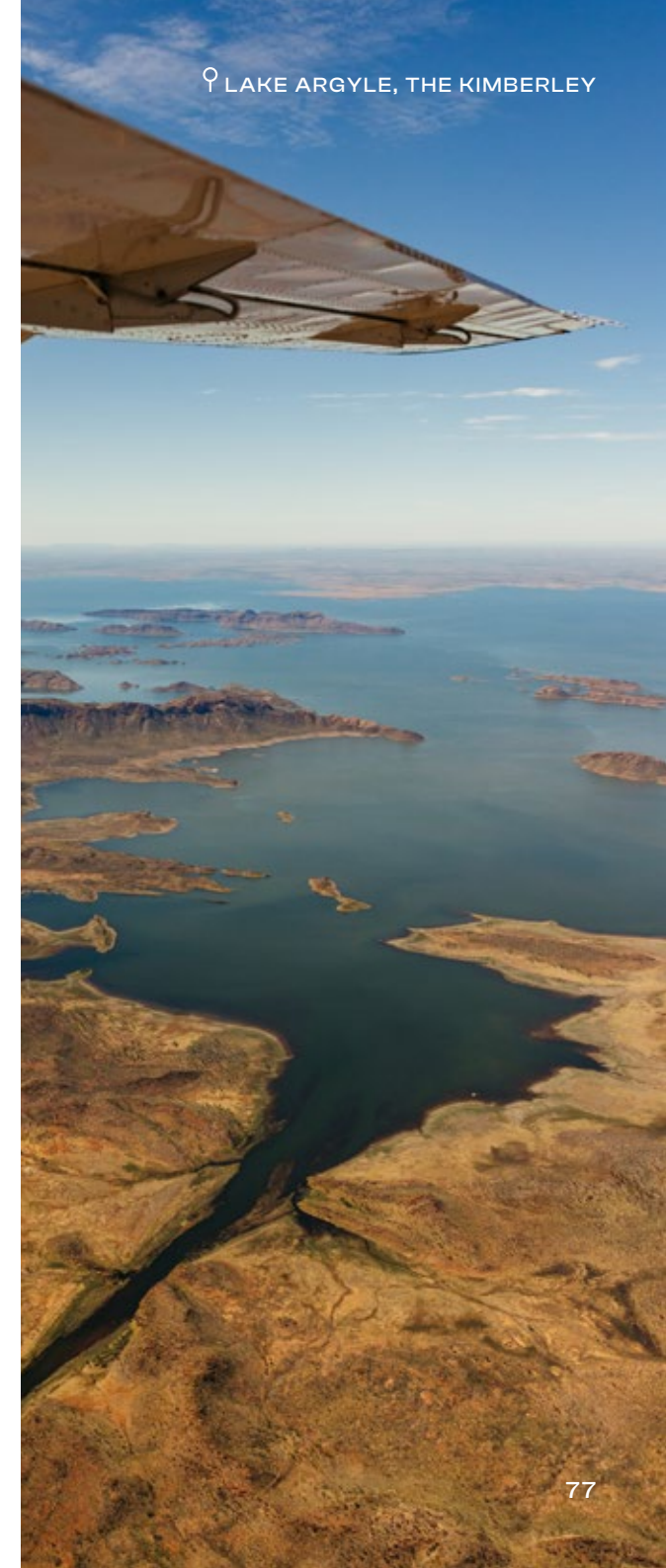
The delivery of Kununurra's airport infrastructure, in alignment with the East Kimberley Regional Airport Master Plan 2017, will enable larger aircrafts and a higher volume of passengers to access Kununurra directly, allowing additional leisure visitation opportunities. In conjunction with this, consideration should be given to how Kununurra and surrounds is activated to maximise visitation opportunities. This should include assessment of appropriate accommodation options, improved township amenities and new tourism product development.

RATIONALE

Aviation linkages to Kununurra from major ports on the east coast creates alternative access into the Kimberley region, and will deliver visitors directly to the doorstep of popular tourism attractions such as Lake Argyle, Gibb River Road and Purnululu National Park.

ACTIONS

- Progress infrastructure upgrades at Kununurra Airport.



BROOME ACCOMMODATION INVESTMENT

APPROACH

Utilise findings from the Broome Accommodation Study (2024), which assessed the supply and demand of short-stay accommodation in Broome, to assist in attracting new investment into short stay accommodation.

RATIONALE

Broome has seen robust and increasing demand for short stay accommodation across all source markets. This is in conjunction with a prolonged lack of investment into new tourism development. Lack of new development has implications on the stagnation of Broome as a tourism destination, the attraction of new flight routes to and from Broome airport, and the leveraging of HYT spend from cruise shipping.

ACTIONS

- Progress outcomes from the Broome Accommodation Study to attract investment into new tourism accommodation.



ABORIGINAL TOURISM DEVELOPMENT

APPROACH

Investigate new opportunities for Aboriginal tourism product development throughout the region to continue to develop the density and diversity of Aboriginal tourism experiences. Support proposed Aboriginal tourism offerings to completion and engage in collaborative campaigns to ensure visitors are aware of the range of existing experiences.

RATIONALE

The ANW region has the opportunity to be the premier Aboriginal tourism destination in Australia through a focus on engagement with TOs interested in tourism and new product development, including Aboriginal-led accommodation options.

ACTIONS

- Engage with interested TO groups to explore tourism development opportunities throughout the region.
- Progress delivery of the following product development opportunities:
 - Murujuga Tourism Precinct and Living Knowledge Centre, including accommodation;
 - Aboriginal cultural centre in Broome
 - Millstream Chichester National Park Eco Retreat.
- Continue to promote the ANW region as an Aboriginal tourism destination by spotlighting the range of existing products.



ANW ACTION PLAN

The ANW TDMP Action Plan has been informed by the subregional priorities developed through industry consultation, desktop research and consumer insights research. The following tables outline actions, projects and the partner agencies/stakeholders responsible.

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

INITIATIVE	PARTNERS	ACTION	SUBREGION
ADDRESSING SUPPLY ISSUES			
Deliver long-term international and national scheduled airline services to the ANW region to support leisure visitation, focusing on ANW's current key tourism markets and growth opportunities.	Kununurra Airport, DoT, ANW, TWA, KDC	Deliver upgrades to airport/airstrip infrastructure at Kununurra Airport to enable more viable leisure aircraft usage.	The Kimberley
	Airlines, DoT, TWA, ANW	Support plans to improve intrastate aviation connections throughout the region.	Throughout region
	DBCA, DoT, PDC, TWA	Investigate opportunities for larger leisure aircraft to access Karijini National Park via nearby airstrips. Investigate locations where a new airstrip could be developed to service Karijini National Park, that facilitates larger capacity planes.	The Pilbara
	DoT, Karratha Airport, TWA, LGAs	Explore potential international routes that would suit Karratha's product offering and pursue feasible opportunities.	
	Broome, Kununurra and Karratha airports, LGAs, DoT, TWA, Airlines	Pursue additional direct domestic flights into Broome, Kununurra and Karratha to facilitate leisure visitation. Assess viability of direct domestic flights into other airports throughout the region.	Throughout region
Support transport infrastructure upgrades and signage to facilitate visitor dispersal throughout the region and improve the experience along leisure drive routes.	MRWA, TWA, KDC, LGAs	Maintain and advocate for the Gibb River Road to remain the Kimberley's epic four-wheel driving road-trip.	The Kimberley
	MRWA, TWA, KDC, TOs	Identify and investigate priority road upgrades and required signage on the Dampier Peninsula that will assist with tourism growth.	Broome
	TWA, MRWA, LGAs, KDC, PDC	Support ongoing road upgrade programs for MRD Hwy, Tanami Road and Marble Bar Road.	Throughout region
	MRWA, KDC, PDC, LGAs	Address roadside rest areas and signage needs including updating inaccurate information. Facilitate electric vehicle charging on major routes.	

INITIATIVE	PARTNERS	ACTION	SUBREGION
	TWA, MRWA, LGAs, KDC, PDC, DBCA	Advocate for upgrades to Banjima Drive, Snappy Gum Drive and Lake Argyle boat ramp.	Throughout region
	LGAs, ANW, TWA	Work with LGAs and industry on improved visitor support structures to facilitate ease of access around the region, including hire car availability and tour services.	
	DoT, Australian Government, DBCA, KDC, PDC	Prioritise funding to maintain remote airstrips near high-visitation attractions to ensure that tourism can continue to provide economic and job outcomes for regional communities and Aboriginal people, including at Mitchell Falls and Purnululu National Park.	
	PDC, ANW, LGAs	Explore the opportunity to redevelop Warlu Way into a tourism-focused asset, including journey consolidation, signage, welcome rest stops and visitor infrastructure.	The Pilbara
	MRWA, DBCA, LGAs	Ensure safe access to national parks through strategic investment in roads to key destinations, with a particular focus on parks adjacent to Gibb River Road, Mitchell River, Purnululu, Wolfe Creek Crater, Karijini and Millstream Chichester national parks, and new parks and reserves created under Plan for Our Parks.	Throughout region
Drive the sustainable growth in cruise tourism across the region.	KPA	Secure first point of entry status for Broome Port and seasonal exemptions for Wyndham Port for expedition vessels.	Broome and the Kimberley
	SoB, KDC, KPA	Deliver new cruise and marine infrastructure in Broome to improve land-side experience and ground handling, including Broome boating facility and a new cruise passenger terminal.	Broome
	TWA, KDC	Maximise tourism opportunities in the development of KMSB.	The Kimberley
	TWA, PDC, ANW	Support Dampier as an expedition cruise destination and focus on improving the land-side experience options, ground handling and centralising management.	The Pilbara
ADDRESSING DEMAND ISSUES			
Increase awareness of tourism drive routes to encourage dispersal of visitors.	ANW, TWA, WAITOC	Consolidate the branding and identity of Warlu Way and Savannah Way, and raise awareness of them as the major tourism self-drive routes across key domestic and international markets.	Throughout region
Overcome barriers of cost to travel into the region.	DoT, TWA, Airlines, ANW	Support incentivisation of leisure travellers on domestic airline routes across all subregions of ANW — focusing on hub airports of Karratha, Broome and Kununurra.	Throughout region
Grow reputation and value of cruise industry.	TWA, ANW, LGAs	Promote and market the unique cruising opportunities throughout the region, through engagement with industry at conferences, trade events, famil programs and itinerary development.	Throughout region

2. WIDEN THE RANGE OF ACCOMMODATION PRODUCT ACROSS THE REGION, AS RELEVANT TO MARKET NEEDS

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Grow the inventory of short stay accommodation in ANW.	TWA, ANW, KDC, PDC, LGAs, WAPC, DPLH	Undertake an assessment of accommodation pressure points and market needs in key visitor destinations.	Throughout region
	TWA, Industry, LGAs, ACs	Develop a targeted program to attract private investment from existing and new accommodation providers.	
	TWA, DBCA, TOs	Explore opportunities for the development of unique and signature accommodation opportunities in/around national parks.	
	TWA, TOs	Investigate locations for new Camping with Custodians products in conjunction with TO groups.	
	TWA, PDC, ANW, DBCA	Support industry and TO aspirations to deliver low-impact and sustainable accommodation in or near Karijini, Murujuga and Millstream-Chichester National Parks.	The Pilbara
	TWA, KDC, PDC, DBCA, TOs	Investigate opportunities for accommodation development along key touring and drive routes, including Gibb River Road and Warlu Way which are sympathetic to the environment.	Throughout region
	Town of Port Hedland, PDC	Support the development of eco accommodation within the Spoilbank Marina development.	The Pilbara
	TWA, LGAs, DPLH, WAPC	Pursue cross-government support for policies to encourage new investment in tourism accommodation, including reviewing land tenure at key locations and development of investment prospectuses.	Throughout region
	TWA, ANW, PDC, KDC, ACs, DevWA	Work with industry to attract investment, and deliver a managed increase in offerings according to accommodation needs assessments, focusing on: <ul style="list-style-type: none"> • HYT segment. • Family/group leisure segment. • Self-drive segment. • Aboriginal-owned accommodation. 	Throughout region
	TWA, ANW	Support the growth of station stay/agritourism opportunities in suitable locations.	
Industry, DEMIRS, TWA, LGAs, TOs, RDC, DPLH	Identify and progress, where feasible, opportunities to reuse or adapt disused heritage or mine site assets into tourism accommodation.		

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING DEMAND ISSUES			
Achieve trade readiness for accommodation offerings.	TWA, Austrade, ANW	Work with industry to achieve trade-readiness for accommodation offerings that aren't already operating in the trade distribution space. Work with new accommodation operators in planning to achieve trade readiness.	Throughout region
Promote shoulder season as an affordable alternative to peak season.	ANW	Develop shoulder season campaigns, products and events, highlighting the competitive price and availability of tourism accommodation in the region during this period.	Throughout region
ADDRESSING CAPABILITY ISSUES			
Support Aboriginal stakeholders seeking involvement in tourism.	TWA, TOs, DBCA	Explore partnership opportunities with Native Title Holders who are interested in being involved in the development of tourism accommodation, including in new Plan for Our Parks reserves.	Throughout region
Advocate for tourism focused land use planning.	TWA, LGAs, WAPC, DPLH, WALGA	Advocate for greater consideration of tourism in local planning strategies and policy frameworks.	Throughout region

3. INCREASE THE CHOICE, QUALITY AND QUANTITY OF TOURISM PRODUCTS ALIGNED TO KEY CONSUMER INTERESTS

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Investigate and deliver new tourism assets that encourage increased length of stay and regional dispersal, and align with consumer demand and product pillars for each subregion.	TWA, ANW	Collaborate with stakeholders to identify gaps in current product offerings and establish priorities for each subregion.	Throughout region
	TWA, DBCA, Industry, KDC, PDC	Investigate the opportunity to develop new signature tourism experiences in the Pilbara and Kimberley, such as skywalks, ziplines and multi-media story experience. Seek to deliver feasible, accessible and sustainable opportunities.	
	SoB, Town of Port Hedland, TWA, ANW, Industry, Hedland Maritime Initiative	Maximise tourism opportunities in the implementation of the Walmanyjun Cable Beach Foreshore Redevelopment and Port Hedland Spoilbank Marina.	Broome, Port Hedland
	DBCA, TWA, KDC, TOs	Establish and activate an iconic Kimberley walk trail adventure.	The Kimberley
	TWA	Investigate iconic four-wheel driving adventure trail opportunities to ensure the longevity of authentic four-wheel driving outback experiences in the region.	
	DBCA, TOs	Prioritise the redevelopment of the Danggu Geike Gorge infrastructure destroyed by the 2023 floods.	
	TWA, DBCA, Dambimangari Aboriginal Corporation, TOs, ANW, WAITOC, KMTA, Industry	Through a cross-government and industry working group, and in consultation with key stakeholders, identify, investigate and develop culturally appropriate tourism experiences at Garaan-ngaddim Horizontal Falls.	
	TWA, DBCA, Bunuba Dawangarri Aboriginal Corporation, KDC	Prepare a detailed feasibility/business case for a cultural attraction/performance facility at Windjana Gorge.	
	TWA, DBCA, ANW, PDC	Implement tourism product and services development opportunities identified in Tourism WA's study Pilbara Tourism Opportunities.	The Pilbara
	DPLH, ANW, TWA	Explore geotourism product development opportunities in alignment with the Dinosaur Coast National Heritage Management Plan.	Broome
	TWA, KDC, PDC, DBCA	Deliver new signature tourism assets in the Pilbara and Kimberley based on assessment of opportunity.	Throughout region
	TWA, LGAs	Support improved tourism facilities and amenities to facilitate product development and visitor experience.	
DBCA	In partnership with TOs, investigate opportunities to enhance, upgrade and/or develop key visitor infrastructure and access within national parks and future parks.		

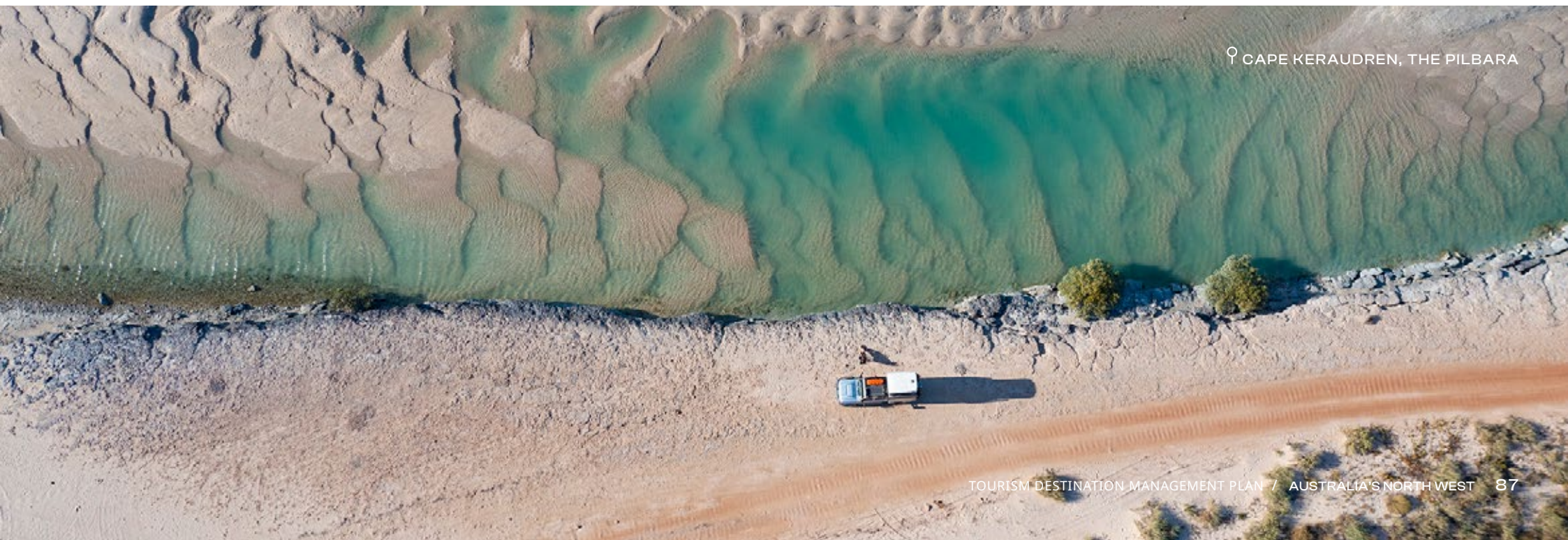
INITIATIVE	PARTNERS	ACTIONS	SUBREGION
Invest in national park infrastructure to ensure quality and sustainable visitor experiences, conserve park values and retain the unique sense of place experiences.	DBCA	Investigate and provide for quality visitor infrastructure, with a particular focus on Yawuru parks, Danggu Geikie Gorge, Dimalurru Tunnel Creek, Bandilngan Windjana Gorge, Mirima, Mitchell River, Purnululu, Wolfe Creek Crater, Karijini, Millstream Chichester, and Murujuga national parks, and Wunaamin and Miluwindi conservation parks and future parks.	Throughout region
		Enhance visitor experiences and understanding of natural and cultural values in national parks through improvements to interpretive information and experiences, including VCs in Karijini, Millstream Chichester and Purnululu national parks.	
ADDRESSING DEMAND ISSUES			
Package products and experiences to encourage visitor dispersal.	ANW	Progress whole of region gastronomy and artisan trails that bundle key experiences across the ANW region and drive awareness of new and existing products.	Throughout region
	TWA, ANW	Focus strategic communications on linking the state's northern UNESCO World Heritage Sites including Murujuga National Park, should it achieve UNESCO classification. Create a cross-regional itinerary that reflects product and accommodation options in alignment with the UNESCO World Heritage Sites.	
ADDRESSING CAPABILITY ISSUES			
Create support structures for industry capability and capacity improvements.	TWA, ANW, Industry, SBDC, LGAs	Work with industry to provide training and development for increased quality of tourism experiences for visitors.	Throughout region

📍 CYGNET BAY PEARL FARM, THE KIMBERLEY

4. WORK WITH TRADITIONAL OWNERS TO INCREASE THE ABORIGINAL TOURISM OFFERING, POSITIONING ANW AS THE PREMIER ABORIGINAL TOURISM REGION IN AUSTRALIA

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Deliver new Aboriginal tourism products to expand and diversify the offering.	TWA, TOs, DBCA, ANW, KDC, PDC	Seek opportunities for the development of new accommodation/experiences through the National Park Tourism Experience Development Program.	Throughout region
	WAITOC, TWA, TOs, Event organisers	Investigate growth opportunities for Aboriginal-led events.	
	TWA, DBCA, TOs, PDC	Support the complete delivery of projects currently in planning stages at Murujuga and Millstream Chichester National Parks.	The Pilbara
	NBY, SoB, TWA, Dev WA, ANW	Support the delivery an Aboriginal cultural centre in Broome.	Broome
	TWA, TOs, WAITOC, ANW	Collaborate with stakeholders to identify new Aboriginal tourism product offerings in targeted locations.	Throughout region
	TWA, TOs, WAITOC, ANW	Increase Aboriginal-delivered experiences on the Dampier Peninsula.	Broome
	TWA, TOs, WAITOC, ANW, DBCA, ACs, Cruise sector	Grow the inventory of cultural experiences available on the remote Kimberley coast for the expedition cruise sector.	The Kimberley
	TWA, TOs, KDC, WAITOC	Engage with interested TO groups to explore tourism development opportunities to align with Tanami Road sealing.	
	TWA, TOs	Support the implementation of the Jina: WA Aboriginal Tourism Action Plan 2021–2025 (or future editions) with priorities as they relate to the Kimberley and Pilbara, including the Dampier Peninsula and the Custodians Program i.e. Camping with Custodians, Art with Custodians and Cruising with Custodians.	Throughout region
ADDRESSING DEMAND ISSUES			
Work closely with stakeholders to deliver targeted campaigns for Aboriginal tourism.	ANW, WAITOC	Align campaigns promoting Aboriginal tourism and ensure every visitor is informed of the opportunities available throughout the ANW region to have an Aboriginal tourism experience.	Throughout region

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING CAPABILITY ISSUES			
Build capacity within the Aboriginal tourism industry.	TWA, TOs, ANW, DBCA, LGAs	Work collaboratively with TOs on establishment of future visitor passes to ensure the passes secure optimal cultural, economic and social outcomes for Aboriginal people and are integrated in a timely manner for the tourism sector.	Throughout region
	SoB	Implement the Broome Arts and Culture Strategy actions to support economic development in Aboriginal communities, highlighting the opportunities for cultural tours and ecotourism.	Broome
	TOs, ACs, WAITOC, TWA, DBCA	Support Aboriginal tourism business and product development to increase the quantity and quality of tourism experiences for visitors.	Throughout region
	TWA, TOs, Industry	Support TOs as they teach the tourism sector how to better understand and respect Country and culture to deliver more culturally sustainable protocols in the ANW tourism industry.	



CAPE KERAUDREN, THE PILBARA

5. CLARIFY THE REGIONAL AND SUBREGIONAL BRAND PROPOSITIONS TO MAXIMISE AWARENESS AND CONSIDERATION OF ASSETS

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING DEMAND ISSUES			
Utilise new consumer insight testing and Tourism WA Walking On A Dream brand strategy and toolkits to devise a clear brand direction for ANW.	ANW, TWA	Activate and promote the Dampier Peninsula as a significant tourism destination.	Broome
		Re-focus to a digital-led marketing presence to reflect evolving consumer requirements.	Throughout region
	ANW, TWA, LGAs	Reassess the findings of the ANW Consumer Insights Research 2022 to deliver greater impact of regional, subregional and destination brands in target markets. Utilise learnings to devise a clear brand direction that showcases key local attributes such as natural wonders, otherworldly phenomena, open space and culture, segmented against key audience personas.	
	ANW, TWA	Drive a communication focus on attraction-led activities, promoting awareness of key destinations/locations.	
		Connect with Tourism WA's brand platform, toolkits and key pillars of Time, Space, Connection and Freedom.	
ANW	Promote major tourism drive routes Warlu Way and Savannah Way to assist dispersal of visitors around the region.		
ADDRESSING CAPABILITY ISSUES			
Develop collaborative marketing with regional tourism bodies and other organisations to focus marketing and trade activity on identified target audiences.	ANW, WAITOC	Explore marketing partnership opportunities with WAITOC and other key stakeholders to deliver targeted marketing, utilising insights from the consumer research, the Tourism WA domestic segmentation model and other relevant data.	Throughout region
	ANW, LGAs, Chambers of Commerce, Industry	Establish a connected marketing approach and clearly define the roles of stakeholders such as ANW, LGAs, Chambers of Commerce and Industry and local tourism organisations.	
	ANW, Industry, Austrade	Expand the trade partnerships and cooperative marketing of ANW attractions.	

6. MAXIMISE THE EVENT PROGRAM TO SUPPORT DISPERSAL ACROSS THE REGION

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Establish a North West events calendar.	PDC, KDC, ANW, TWA, LGAs, Event organisers	Identify market gaps and opportunities for growth of new or existing events, such as Karijini Experience and Taste of Kimberley.	Throughout region
	TWA, ANW, LGAs, BEP	Explore opportunities to expand MICE visitation throughout region, with a focus on Karratha and Broome.	
	TWA, KDC, SoB, ANW	Explore the feasibility of a Kimberley Event Centre in Broome to increase regional capacity and support MICE visitation, particularly outside of peak periods.	Broome
ADDRESSING DEMAND ISSUES			
Assess MICE market opportunities for the region.	ANW, BEP, LGAs	Actively prospect local business event opportunities through relevant sources, taking advantage of opportunities to access business event calendars.	Throughout region
Assess event marketing communications to maximise awareness and visitation.	TWA, Industry	Optimise event branding to align with Tourism WA initiatives, where feasible.	Throughout region
ADDRESSING CAPABILITY ISSUES			
Develop industry capability and knowledge sharing amongst key stakeholders to maximise event opportunities.	TWA, ANW, Event organisers, Industry	Work with event holders and industry operators to develop event-based packages that include accommodation and experiences. Conduct a baseline review of local capacities, proximal accommodation, and industry suppliers to service business event enquiries.	Throughout region
	LGAs, TWA, Event organisers	Assess and share, where possible, event priorities and post-event reporting with event funding stakeholders to ensure growth opportunities are recognised and leveraged by all partners.	Throughout region

7. IMPROVE THE LONG-TERM SUSTAINABILITY OF THE TOURISM SECTOR

INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING SUPPLY ISSUES			
Improve environmental sustainability of tourism operations.	LGAs, DoT	Pursue increased number and frequency of electric vehicle charging stations throughout the region.	Throughout region
Improve housing options in the regions to assist attraction and retention of tourism workforce.	LGAs, TWA, KDC, PDC, DevWA	Support development of workers accommodation and advocate for affordable housing in key locations.	Throughout region
	TWA	Advocate for developments to be sustainably designed.	
ADDRESSING DEMAND ISSUES			
Utilise consumer insights to disperse visitors throughout region, easing pressure on destinations that are experiencing capacity issues.	ANW	Utilise Tourism WA's domestic segmentation model to increase consumer awareness of emerging and developing destinations that align to their interests.	Throughout region
Raise awareness of ANW's attractions in the off-season, to increase the length of the tourism season and economic yield for operators.	ANW	Identify ANW's off-season highlights in campaigns, including flowing waterfalls, lower accommodation rates and green natural setting, to encourage shoulder season visitation.	Throughout region
Maximise awareness of tourism and hospitality as employment options.	TWA, ANW	Raise awareness of WA Jobs website. Develop targeted campaigns towards seasonal work opportunities with backpackers/travellers.	Throughout region



INITIATIVE	PARTNERS	ACTIONS	SUBREGION
ADDRESSING CAPABILITY ISSUES			
Implement Tourism WA's workforce development strategies.	TWA, DTWD, WAITOC	<p>Support and facilitate training and development opportunities across the region to increase the pool of tourism workers:</p> <ul style="list-style-type: none"> • Seek a closer connection to the regional workforce through tourism and hospitality job portals, programs, incentives and campaigns. • Support industry involvement in raising the profile of career opportunities in tourism. • Develop recognised pathways to support career opportunities in tourism. <p>Implement the Jina Plan in relation to Aboriginal tourism workforce initiatives, for mainstream tourism/hospitality opportunities.</p>	Throughout region
Expand industry knowledge of accessibility and inclusion.	TWA, TCWA, ANW, LGAs	<p>Increase the number of tourism businesses with accessible tourism accreditation.</p> <ul style="list-style-type: none"> • Educate the industry on the increasing importance of accessible and inclusive tourism. • Encourage participation with accessible guides and internal reporting frameworks that enable critical self-assessment. • Provide resources to assist industry to meet the needs of accessible markets. 	Throughout region
Engage tourism providers to encourage participation in eco and sustainable practices.	TCWA, ANW, TWA	<p>Increase the number of eco-certified businesses in ANW to improve the environmental sustainability of the region.</p> <ul style="list-style-type: none"> • Educate the industry on the increasing importance that consumers place on a destinations' approach to the sustainability of the tourism offer. • Create awareness of the National Sustainability Framework, and support existing operators to consider engaging with an ecotourism accreditation program. 	Throughout region
Grow awareness and market presence of high quality tourism products.	TWA, TCWA	Promote high quality visitor experiences, and encourage enhancements in business quality/sustainability through the Dream Collective recognition program.	Throughout region
	TWA, Industry	Assist trade ready operators to establish in-market relationships, attend trade events and strengthen WA's market presence through the Trade Ready Introduction Program (TRIP).	

