

Gascoyne
Tourism
Investment Profile



Overview

Tourism is the largest revenue earner of all industry sectors in the Gascoyne Region, attracting an average turnover of \$191 million annually over the years 2006–2008.

Remote wilderness experience and exceptional climate are the main attributes that draw visitors to the Gascoyne. While the visitor's desire to "get away from it all" and "escape the cold" are key motivators, it is the unique natural attractions of the region that are the undeniable drawcard. The Gascoyne's natural attractions are world class with the Shark Bay World Heritage Area, including Monkey Mia in the south and the Ningaloo Reef and the whale shark experience in the north. Inland and to the east are the ancient landforms of the Kennedy Range and Mt Augustus, the world's largest monocline rock.

The Ningaloo Reef is one of the world's largest fringing coral reefs and is home to thousands of species of marine life and megafauna including migrating whale sharks, manta rays, turtles and humpback whales. Visitors can experience much of this marine life directly from the beach, making the Ningaloo experience unique in Australia.

The Shark Bay World Heritage Area is one of the few areas around the globe that meets all four natural criteria for World Heritage Listing; natural beauty, biological diversity, natural processes and earth's history. The amazing beauty of this unique area should be witnessed from land, sea and air. Monkey Mia, in the eastern gulf of Shark Bay, was one of the first places in the world where wild dolphin interaction became possible.

The Gascoyne Region also boasts two world class cultural attractions in the Shark Bay World Heritage Discovery Centre in Denham and Gwoonwardu Mia, the Gascoyne Aboriginal Heritage and Culture Centre in Carnarvon.

Visitors

Tourism WA reports that between 2007 and 2009 intrastate visitors made up 61% of visitors to the Gascoyne, with international visitors making up 23% and interstate visitors, 16%. In the period 2006–2008, Tourism WA estimates the annual domestic visitor expenditure was \$162 million with the annual international visitor expenditure estimated to be \$29.5 million.

The domestic tourism season runs from April/May to September/October underlining the region's importance as a winter get-away. This period in the Gascoyne is typified by mild and sunny weather and coincides with the annual visitation of whale sharks and other marine megafauna. International tourists tend to visit during the summer period of October to December which coincides with winter in the northern hemisphere.

Many of the visitors coming to the region for holiday or leisure are self drive tourists looking for a nature based experience.

Activities

Recent surveys of visitors to the Ningaloo Coast (Carnarvon to Exmouth) have shown that snorkelling is the most popular activity followed in order by sunbathing, sightseeing, shopping, eating out, fishing from the shore and fishing from a boat. Nature based interactive activities sought by visitors include safari tours, coral viewing tours, diving, swimming with whale sharks, surfing and windsurfing.

Marketing

Marketing activities to promote tourism in the Gascoyne are carried out by two Regional Tourism Organisations. Australia's Coral Coast promotes coastal experiences while Australia's Golden Outback focuses on inland activities. In addition to their websites, both these bodies produce an annual holiday planner and conduct interstate and international marketing campaigns.

Visitor Centres in Denham, Carnarvon and Exmouth take bookings through their websites and produce and distribute annual holiday planners for each town as well as providing local information.

Planning and Research

Planning and development on the Carnarvon Ningaloo coastline is guided by the *Ningaloo Coast Regional Strategy–Carnarvon to Exmouth, 2003*, a Western Australian Planning Commission strategic land use plan. Locations for tourist 'nodes' and development styles and limits are outlined in this document.

The Sustainable Tourism Cooperative Research Centre at Curtin University has carried out extensive visitor research specific to the Ningaloo Coast. In-depth visitor data is published in the document *Ningaloo Coast Region Visitor Statistics*, available from their website. This data was collected for the Ningaloo Destination Model designed by the Ningaloo Collaboration Cluster, including CSIRO, to simulate the social, economic and environmental impacts of different tourism scenarios.

A GDC facilitated taskforce is conducting prefeasibility work on tourism development in the Upper Gascoyne, specifically at Mt Augustus. This information can be accessed on the GDC website.

Further levels of statistical information on Australia's Coral Coast and Australia's Golden Outback can also be obtained through Tourism WA and Tourism Research Australia.

Accommodation

Accommodation providers in the coastal areas of the Region operate at almost 100% occupancy in "peak season" from April to September. In fact demand is greater than supply during these months. But numbers drop significantly for the remainder of the year making it difficult to justify new accommodation development.

Yet the opportunity to grow the shoulder season, especially to the international market, is available to new quality developments and existing accommodation providers. New operators offering quality facilities, new activities such as viewing turtle nesting, participating in adventure sports or creating niche events can create additional visitation in the October/November and February/March periods.

Gascoyne accommodation providers could advertise to the Pilbara workforce, a largely untapped market, with off season specials. These current market gaps provide the right operator plenty of scope to develop new tourism infrastructure.

Opportunities

The fragile beauty and remoteness of high value attractions, both on the Gascoyne coast and the Gascoyne inland, make it the perfect place to develop eco-tourism accommodation and activities. Opportunities to do so are outlined in the Ningaloo Coast Regional Strategy.

Medium to long term opportunities for the tourism industry in the Gascoyne Region include:

- Development of small tourist node businesses e.g. surfing lessons, kayak hire, snorkelling tours, heritage walks etc
- Eco-style accommodation development
- Resort accommodation
- Fishing charters
- Indigenous tours
- Pastoral and plantation station stay accommodation, adventure sports experiences and work experience.

Potential marketing directions:

- Extending the shoulder season through event development
- Marketing direct to the Pilbara workforce

Estimated contribution of tourism industry to the Gascoyne Region 1999 – 2009

	98/99	99/00	2001	2002	2003	2004	2005	2006	2007	2008
\$M	-	142	136	154	178	172	154	212	159	204

Estimated visitor expenditure in the Gascoyne Region 2001 – 2008

	2001	2002	2003	2004	2005	2006	2007	2008
Domestic \$M	111	128	152	147	131	186	130	171
International \$M	25	26	26	25	23	26	29	33.5

Estimated number of visitors to the Gascoyne Region 2001 – 2008

	2001	2002	2003	2004	2005	2006	2007	2008
Domestic ('000)	174	208	216	218	202	182	188	188
International ('000)	65	60	59	58	52	49	50	53
Total	239	268	275	276	254	231	238	241

Supporting documents and resources

Gascoyne Development Commission www.gdc.wa.gov.au

Tourism Western Australia www.westernaustralia.com

Australia's Coral Coast www.australiascoralcoast.com

Australia's Golden Outback www.australiasgoldenoutback.com

Ningaloo Coast Region Visitor Statistics www.crctourism.com.au

Ningaloo Coast Regional Strategy Carnarvon to Exmouth www.planning.wa.gov.au

Tourism Research Australia www.tra.australia.com



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