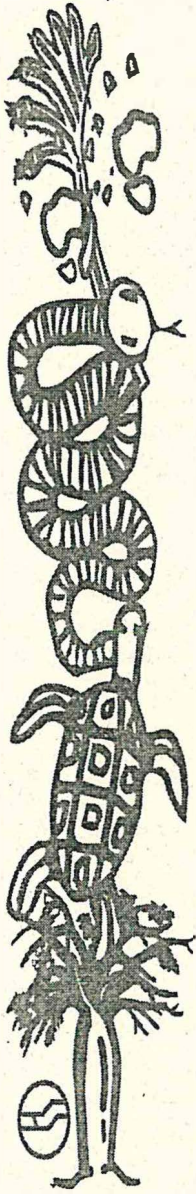


064647



DEPARTMENT OF CONSERVATION AND LAND
MANAGEMENT

TOURISM MARKETING STRATEGY

April, 1998

DRAFT ONLY

David Kirkland

CALM TOURISM MARKETING STRATEGY

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EXECUTIVE SUMMARY

The following Tourism Marketing Strategy proposes an integrated management approach to CALM's involvement in tourism.

What the strategy will do

The initiative will substantially increase the profile of the CALM estate and generate new revenue which can be directed towards maintaining and improving its natural assets. It will enhance the public's value of the CALM estate and provide a co-ordinated approach to how WA's natural tourism assets will be developed and promoted to optimise visitations while minimising the impact of tourism on the environment.

Strengthening CALM's position in the tourism industry

The Tourism Marketing Strategy will considerably strengthen CALM's involvement in tourism and its relationship with the tourism industry. While the strategy will substantially broaden and highlight the appeal of its estate by producing a range of high quality promotional collateral (Pages 26-32), it will also offer a range of benefits and services to the tourism industry and the community. Importantly, the strategy will seed co-operative marketing initiatives (P64) and provide the "tools" which will enable the travel and tourism industries to sell CALM's tourism product domestically and internationally, rather than CALM having to embark on an expensive selling program itself.

Creating a "Marketing Ethos" within CALM

Internally, the strategy will see CALM begin to nurture a marketing ethos in the way it delivers its tourism services and develops its core tourism businesses. The strategy seeks to promote awareness within CALM of the importance of marketing as a management tool, and provides guidance and training to staff about the ways tourism can be harnessed to meet the department's objectives (P24,50). It proposes the job descriptions of the Tourism and Recreation Program Leaders be modified to include marketing responsibilities which would create a network of CALM personnel that could effectively develop and strengthen the marketing strategy at both a regional and state level (P25).

It also provides for an integrated framework within which effective marketing plans can be developed for each of CALM's commercial sites (P24).



Developing strong, mutually beneficial partnerships

The strategy provides for strong, pro-active partnerships with industry at both a state and regional level. It complements the WATC's program and seeks to build effective and mutually beneficial relationships with key stakeholders including the RTA's and Tourist Information Bureaus, Development Commissions, local government authorities and the media to promote, protect and develop CALM's natural assets.

Developing "Tourism Product" within the CALM estate

The strategy provides a planning framework which will harness available resources both within and outside of CALM to develop new, nature based tourism product. It seeks to prioritise the provision of basic tourism infra-structure in Established and Emerging Parks (48-49), work with industry to improve standards of service (P40), broaden the range of tourism product offered by CALM (P50), fast-track two major world-class tourism projects (P51) and provide for a mechanism which manages tourism visitations to minimise the negative impact on the environment (P52).

Internal and External Communication

The communication strategies (P52-58) propose a sensible investment of time and resources to clearly communicating CALM's new position both within and outside of the department.

The three key messages are:

That CALM is committed to a Nature Based Tourism Strategy .

That CALM is committed to developing partnerships with the tourism industry which will strengthen the profile of its asset and improve the quality of experience of its visitors

That CALM is in the business of tourism in terms of generating revenue which can be channelled back into protecting and managing its estate.

Key target audiences have been identified and will be impacted on.

Key Recommendations

A summary of Key Recommendations is included (P59).

TERMS OF REFERENCE

Following are the Terms of Reference for a Tourism Marketing Strategy for the CALM estate.

The consultancy seeks to deliver a strategic tourism marketing document which makes detailed reference to the following key points:

- A review of CALM's existing marketing activities.
- Identification of external and internal audiences of the strategy.
- Identification of strategic partnership opportunities.
- National Park Passes.
- Statewide branding of CALM's tourism product.
- Merchandising.
- Co-operative advertising and promotion opportunities.
- An appropriate management structure to implement the marketing strategy
- Resourcing the strategy

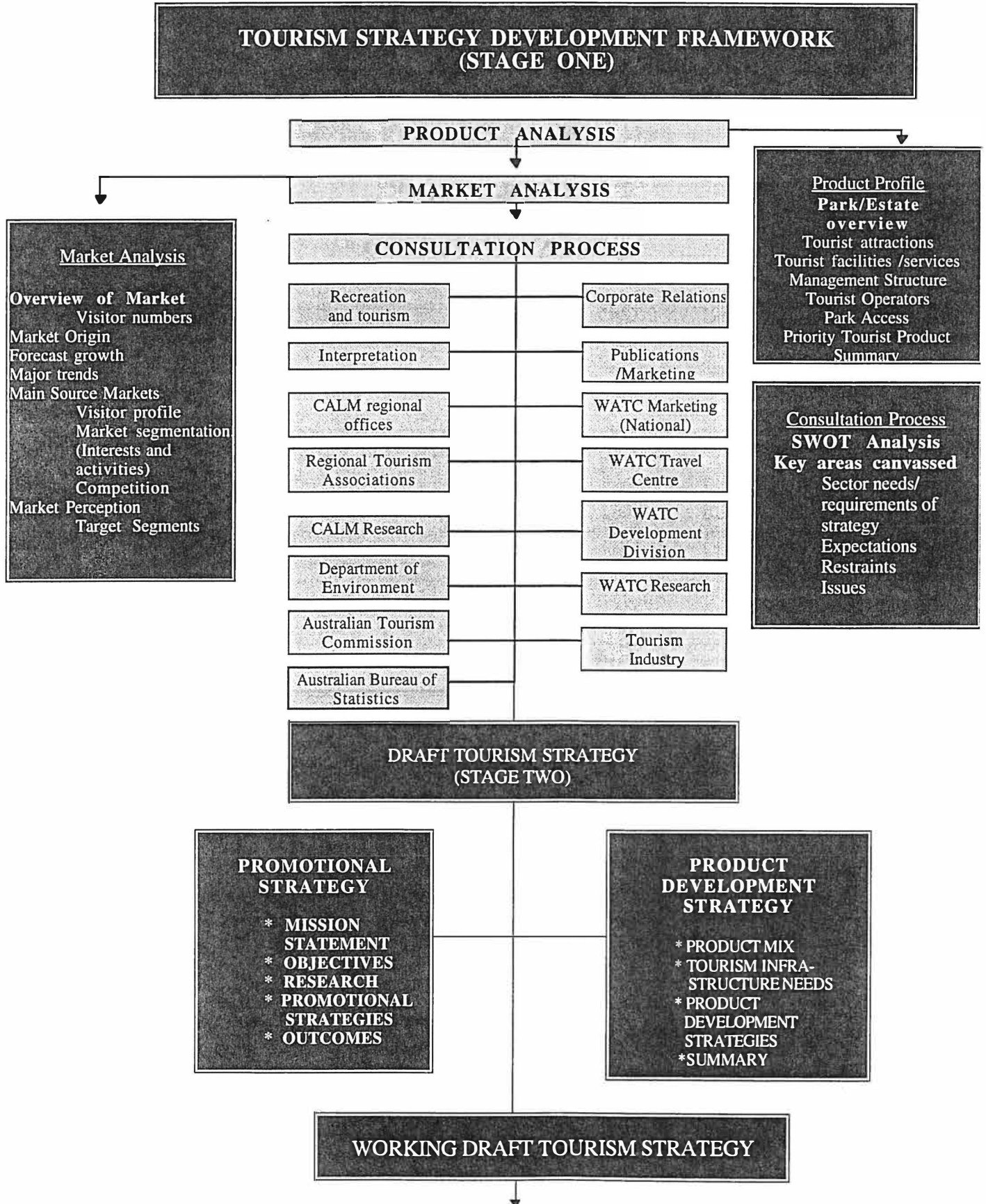
The consultancy was undertaken by David Kirkland, with input provided by Terry Penn and Eddie Watling from Tourism Co-ordinates. It was completed in April, 1998.

NOTE: It should be noted that this strategy document has been modified for external use, excluding reference to how CALM will deliver and fund its Tourism Marketing Strategy.



CONSULTANCY FRAMEWORK

The strategy has evolved through a consultative process with key stakeholders both within and outside of CALM. Following is the framework within which the consultancy developed.



**TOURISM STRATEGY DEVELOPMENT FRAMEWORK
(STAGE THREE)**

STRATEGY RESOURCING

STRATEGY DELIVERY
(Options and recommendation for
mechanism to deliver strategy)

**WORKSHOP/REFINEMENT OF
STAGE THREE**

**TIMING /SCHEDULE OF
STRATEGY DELIVERY**

OUTCOME

**PRESENTATION OF STRATEGIC MARKETING
DOCUMENT**

- * Budget
- * Co-operative input.
- * Revenue raising initiatives.
- * State and Federal funding opportunities.
- * Merchandising
- * Park Passes

**COMMUNICATION
STRATEGY**

Regional integration
Program integration
Industry awareness
Public awareness
Staff Awareness

PART ONE SECTION ONE PRODUCT ANALYSIS

- 1.1 Introduction**
 - 1.2 State Profile**
 - 1.3 Tourist attractions**
 - 1.4 Tourist facilities and services**
 - 1.5 CALM Boundaries of administration**
 - 1.6 Tourism operators**
 - 1.7 Park Access**
 - 1.8 Summary**
-

1.1 Introduction

The purpose of this section is to provide a broad overview and assessment of CALM's tourism assets in Western Australia in terms of their attractions, facilities and services. It seeks to clearly define the "product" which is to be marketed in the strategy, and produce a profile based on available data. This information contributes to identifying the existing tourism product mix managed by CALM.

1.2 State Profile

CALM manages land covering more than 20 million hectares of lands and waters protecting unique landscapes, geological formations, plants, animals and cultural sites of Western Australia. This strategy seeks to market CALM's tourism assets which have been defined as its National Parks, its Conservation Estates, its Marine Parks and its primary commercial tourism enterprises. Within the boundaries of Western Australia CALM manages 63 National Parks, 93 Conservation Estates and six marine parks (Refer Map on following page) Currently, CALM manages several commercial enterprises including Valley of the Giants, The Hills Forest Activities Centre and Perup Wilderness Lodge and Yanchep Inn.

1.3 Tourist Attractions

Western Australia's natural assets are some of the State's primary tourism drawcards offering both domestic and international visitors a range of unique and highly desirable experiences. Visitors can swim with Whale Sharks at Ningaloo Reef, wander through the tree tops at The Valley of the Giants, interact with Penguins on Penguin Island or the Dolphins at Shark Bay, fly over the Bungle Bungle Ranges or descend deep into the two billion year old landscape of Karijini National Park. Within CALM's estate there are more than 300 walk trails many of which include interpretative information and visitor centres.

CALM-MANAGED LANDS AND WATERS

AS AT 30th JUNE 1997

Legend

-  National Park
-  Conservation Park
-  Marine Park / Marine Nature Reserve
-  CALM Regional Office

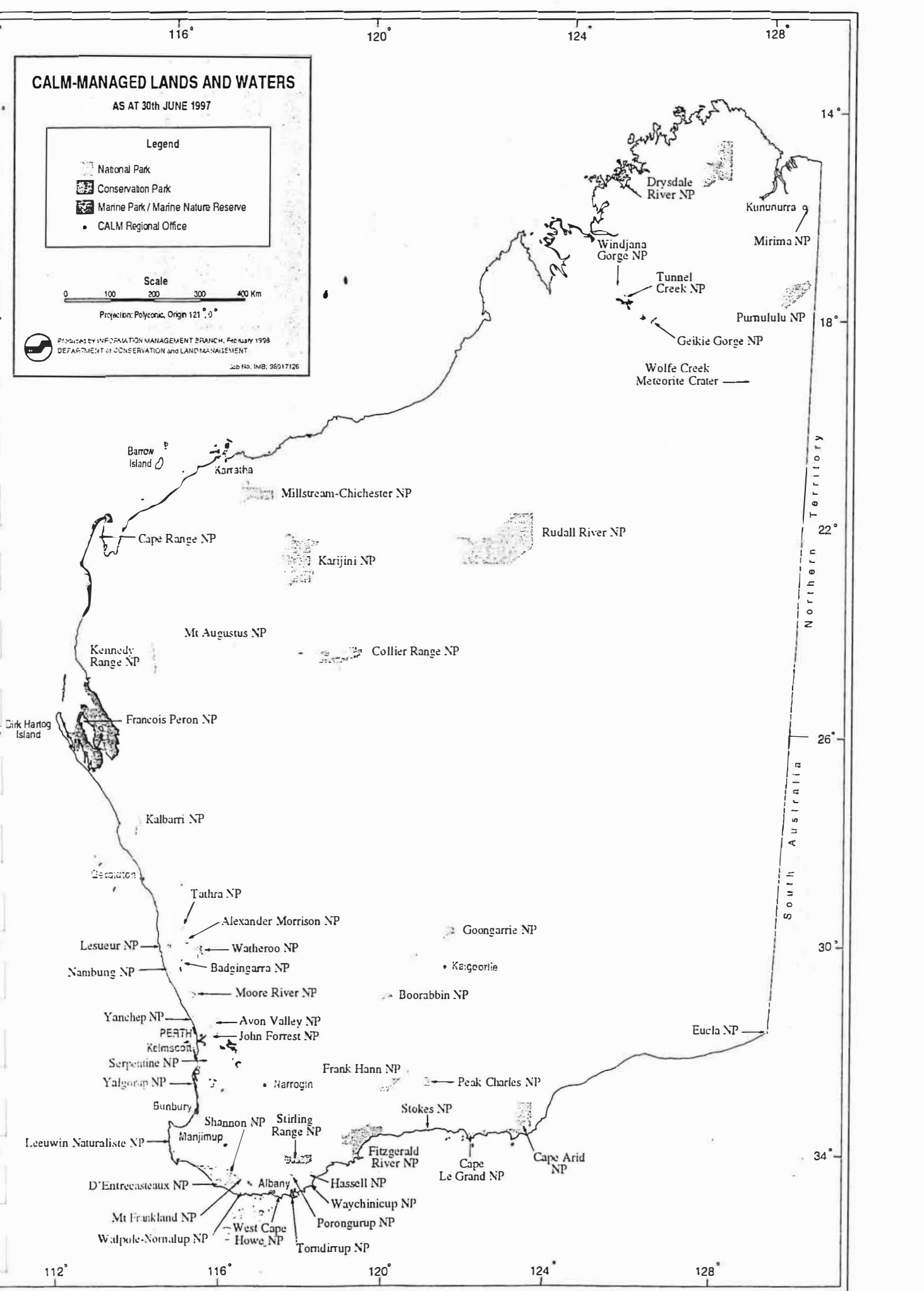
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Produced by INFORMATION MANAGEMENT BRANCH, February 1998
DEPARTMENT OF CONSERVATION and LAND MANAGEMENT

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Tourist attractions to CALM estates include:

- Unspoilt natural environment
- Unique flora and fauna.
- Diverse natural phenomena
- Sites of cultural and historical significance
- Remote, wilderness experience
- Expert interpretation
- Natural diversity within a short distance
- Recreational infra-structure
- A multitude of scenic landscapes and marine environments
- Safe, clear swimming water

1.4 Tourist facilities and services

Tourist facilities in CALM managed estates include:

| | |
|------------|---|
| 108 | Camping grounds |
| 33 | Information Bays/Visitor Centres |
| 126 | Picnic Areas |
| 301 | Walk Trails |
| 47 | Lookouts |
| 366 | Public Access Roads |
| 10 | Fixed Accommodation Sites |
| 349 | Toilets |

Tourist services provided on CALM managed estates include maintenance of tourist facilities (refer above), Tourist Information (Verbal and hand out publications), Interpretative Tours and medical evacuation

1.5 CALM's Management structure

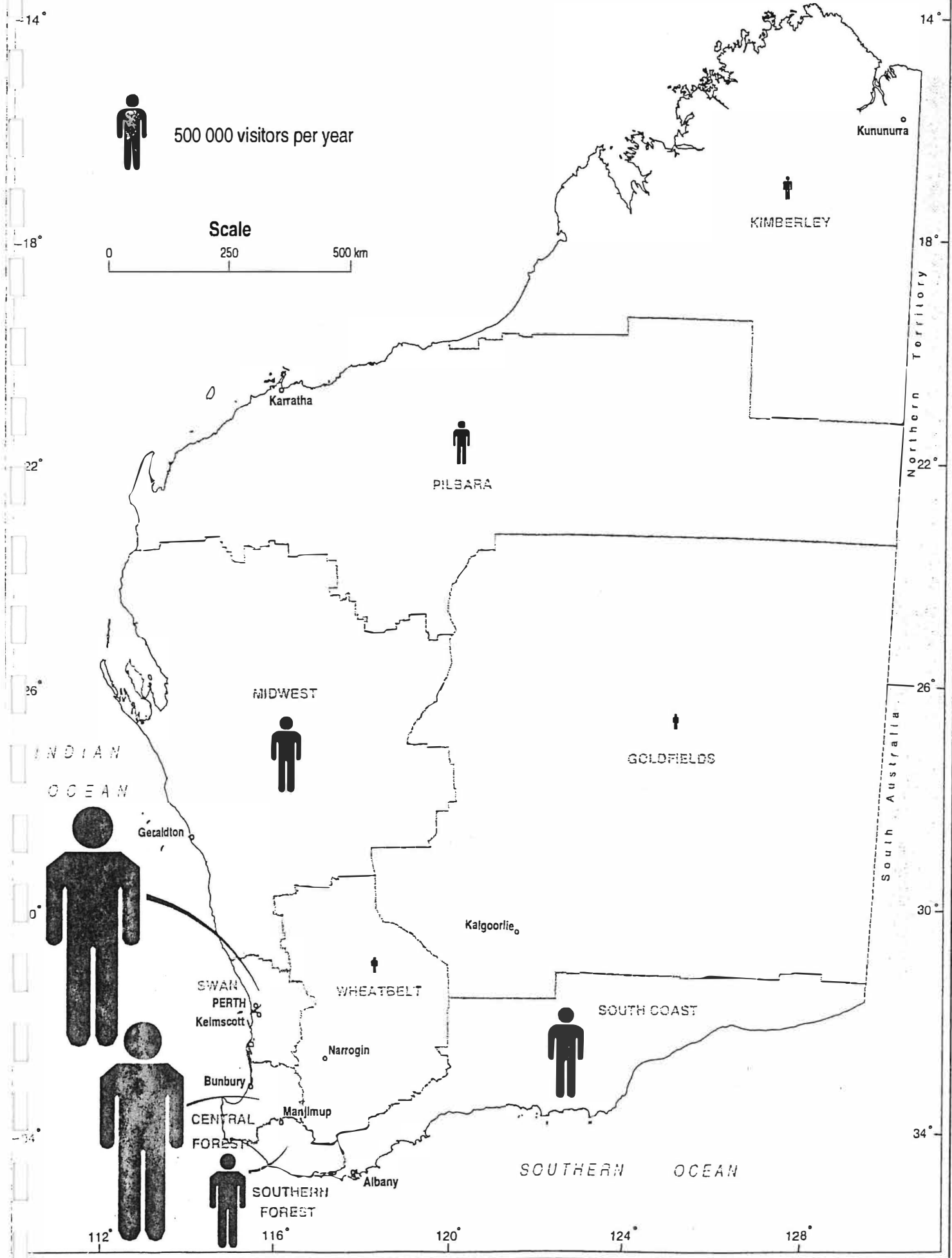
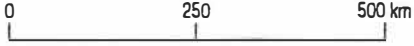
Management of the CALM estate is decentralised from head office in Perth. Western Australia is divided into 10 separate regions each with a regional manager, a district manager and a Tourism and Recreation Program Leader. In total CALM has nine Region Managers, 11 District Managers and 19 Recreation and Tourism Program Leaders.

12° 116° 120° 124° 128°



500 000 visitors per year

Scale



INDIAN OCEAN

SOUTHERN OCEAN

14°

18°

22°

26°

30°

34°

112°

116°

120°

124°

128°

14°

18°

22°

26°

30°

34°

Kununurra

KIMBERLEY

PILBARA

MIDWEST

GOLDFIELDS

Geraldton

Kalgoorlie

SWAN PERTH

Keimscott

WHEATBELT

Narogin

SOUTH COAST

CENTRAL FOREST

SOUTHERN FOREST

Bunbury

Manjimup

Albany

Northern Territory

South Australia

1.6 Tourism Operators.

CALM estates are serviced by commercial tourism operators who apply for a licence to access the parks. There are more than 250 licensed operators on the CALM estate which provide an range of services including:

- Fishing tours
- Interpretive tours
- Helicopter Flights
- Diving excursions
- Bushwalking
- Abseiling
- Coach Tours
- Caving
- Cycling Tours
- Horse riding
- Heritage Tours
- Orienteering
- Photography trips
- Rafting
- School Excursion Programmes
- Scientific Excursions
- Wildflower Tours

1.7 Park Access

Primary access to the CALM estate is by private motor vehicle, coaches and tour operators. (A recent survey indicated that more than 95% of day trippers to the Swan, Central and Southern Forest regions travelled by private vehicle.

1.8 Summary

CALM has a vast natural resource which is highly marketable to domestic and international tourists. Many of its parks are easily accessible by road and well located particularly in terms of their vicinity to Perth.

The parks have a broad appeal and range of attractions - many unique to specific locations - and are serviced by more than 250 tourism operators. Tourism infra-structure ranges from virtually non existent to highly developed depending on the location .

CALM's existing tourism product is highly desirable and is likely to broaden and become increasingly so as more infra-structure is developed and emphasis is placed on promotion.

PART ONE SECTION TWO **MARKET ANALYSIS**

2.1 Introduction

2.2 Visitor numbers and current market origins

- General
- Intra-state arrivals
- Inter-state visitors
- International visitors
- Arrivals to WA National Parks and Estates
- Specific Sites

2.3 Forecast Growth

- Domestic Visitors
- International Visitors
- National Park Visitors

2.4 Major Trends

2.5 Market Profile

- Visitor Age
- Visitor profile based on leisure preference
- Duration of visit
- Expectation/satisfaction level
- Visitor expenditure

2.6 Competition

2.7 Market Perception

2.8 Target Market Segments

2.1 Introduction

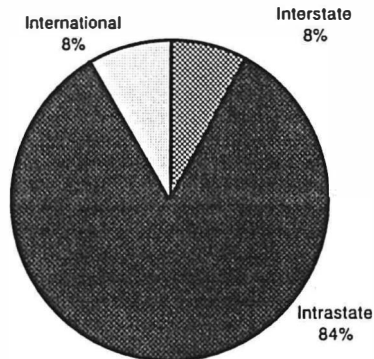
This section provides important background information for the marketing strategy by identifying the source of existing key tourism markets and evaluating the current primary markets for CALMs estates. It also seeks to profile and segment the existing market in terms of its leisure interests and activities.

By taking stock of existing and potential markets and identifying strategic implications of market developments, we are able to provide the basis for the marketing strategy.

2.2 Visitor Numbers and Market Origins

General

Origin of Visitors to WA



Western Australia generated more than 6.3 million visitor trips in 1996-97*

Visitors to W.A fall into three key segments -- international arrivals, interstate arrivals and intra-state arrivals (or visitors originating from W.A). Inter-state and Intra-state tourists are referred to generally as Domestic Tourists

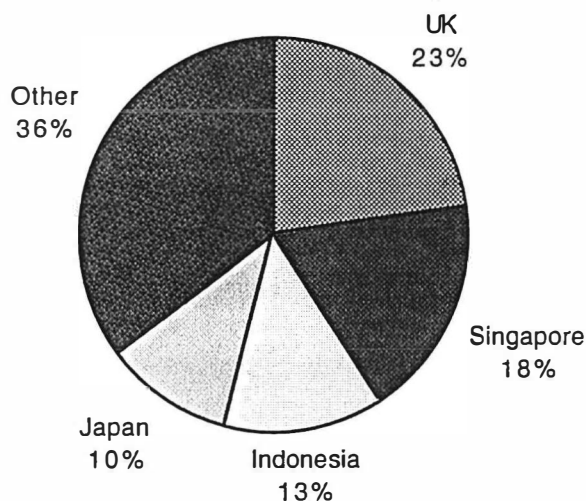
The Bureau of Tourism Research (BTR), estimates domestic tourists currently account for more than 95% of the tourist market within Australia and more than 90% of visitors to Western Australia.

The adjoining graph indicates the proportions each segment has on the overall visiting market

(*WATC's Research Brief, Feb 1998).

International Visitors to Western Australia

Origin of International Visitors



International visitors

International visitors on holiday and visiting friends and relatives accounted for more than 410,000 visitations to WA during 1996-97.

Primary international visitations were from the UK (92,000), Singapore (75,000), Indonesia (55,000) and Japan (43,000) (Refer graph)

Intra-state visitors to Western Australia

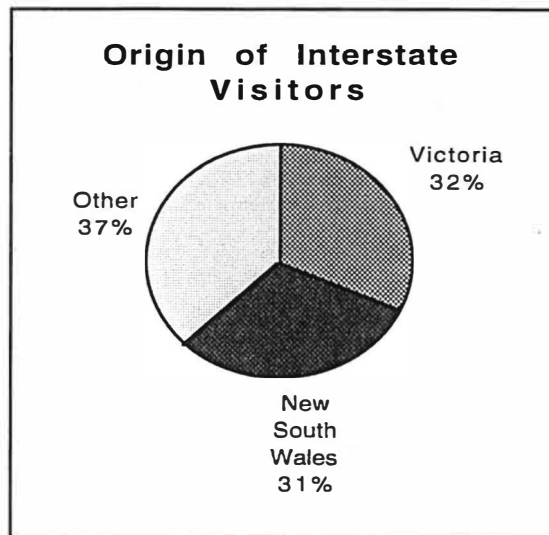
Intra-state visitors accounted for more than 5.3 million visitations in W.A during 1996-97 (WATC Research Brief 1998).

Fifty eight percent of intra-state visitors travelling around WA were from Perth, while the remaining 42% were from country W.A. Perth residents accounted for 62 % of the 18.4 million nights spent in WA by intra-state visitors.

Inter-state arrivals to Western Australia

Interstate visitors on holiday or visiting friends and relatives accounted for more than 508,000 visitations in W.A during 1996-97.

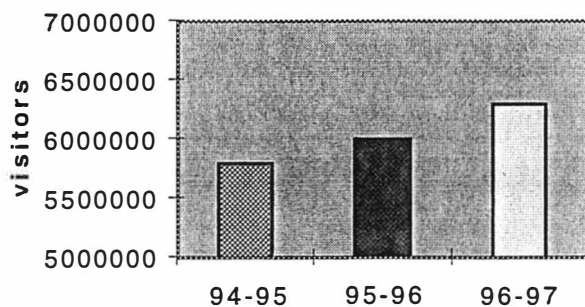
Thirty two percent of the interstate visitations to WA were from Victoria and 30.5% was from New South Wales (Refer graph)



Arrivals to WA National Parks and Estates

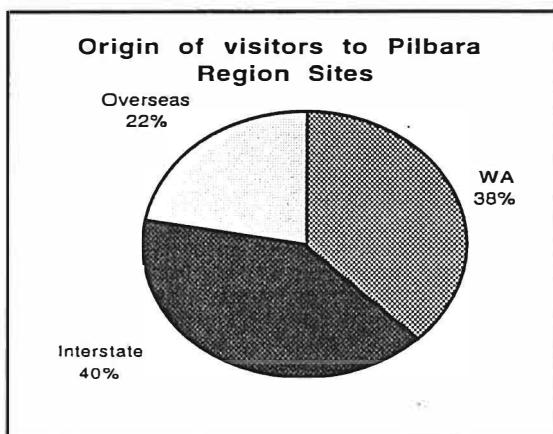
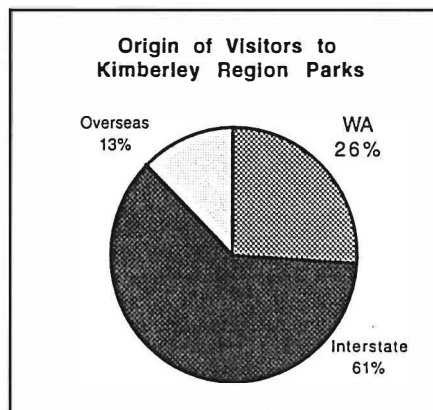
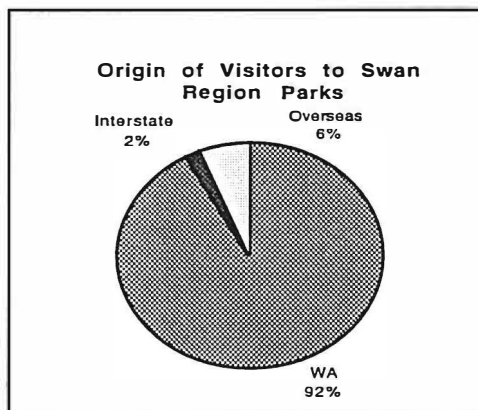
There were 5.3 million recorded visits to CALM estates in 1996-97, however, taking into consideration estimated visits to unmonitored sites and a consistent estimate monitoring model used over the past five years, the figure is likely to be closer to 6.3 million (CALM's VISTAT 1996).

Growth of Visitation to WA's National Parks



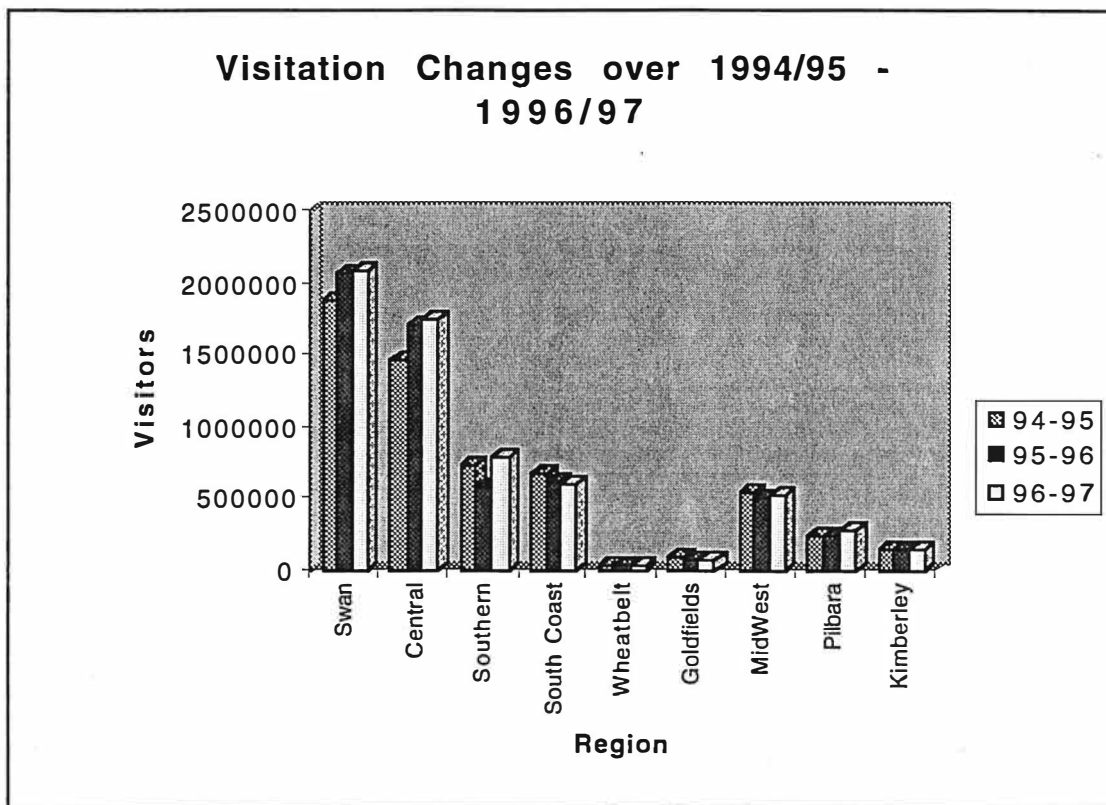
2.5 Main Source Markets

As indicated in the following graphs, the main source markets for visitors to CALM estate are West Australian residents, with the majority emanating from Perth. Ninety two per cent of visitors to national parks in the Swan region (near Perth) are from Western Australia. Key source markets for National Parks located outside of a day trip from Perth, however differ greatly. While West Australian's still make up more than 41% of visiting tourists, there is much higher visitation from interstate and international tourists. Parks in the Kimberley and Pilbara regions for example have high proportions of European visitors.



Visitations

Visitations to regions and specific sites has varied as reflected in the following graphs:

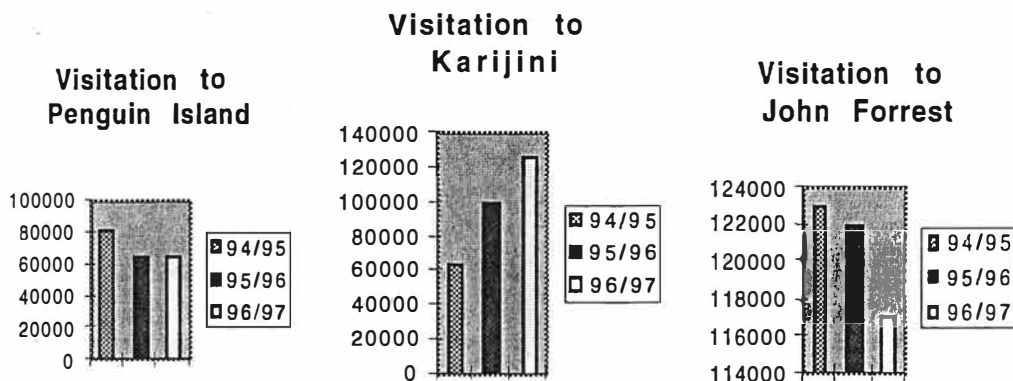


CALM Vistat Study

While there has been an overall increase in recorded visits to CALM managed land and waters from 4.4 million in 1992-93 to 5.3 million in 1996, it should be noted that there was an increase in the number of data collection sites (from 116 to 137) and the extension of CALM territory.

In 1996 the proportion of visitations to CALM estates were similar to previous years with the Swan region (Perth) being the highest at 33% (2,089,000 visitations), followed by the Central Forest region at 28% (1,752,000 visitations) and the Southern Forest region at 12% (782,000 visitations).

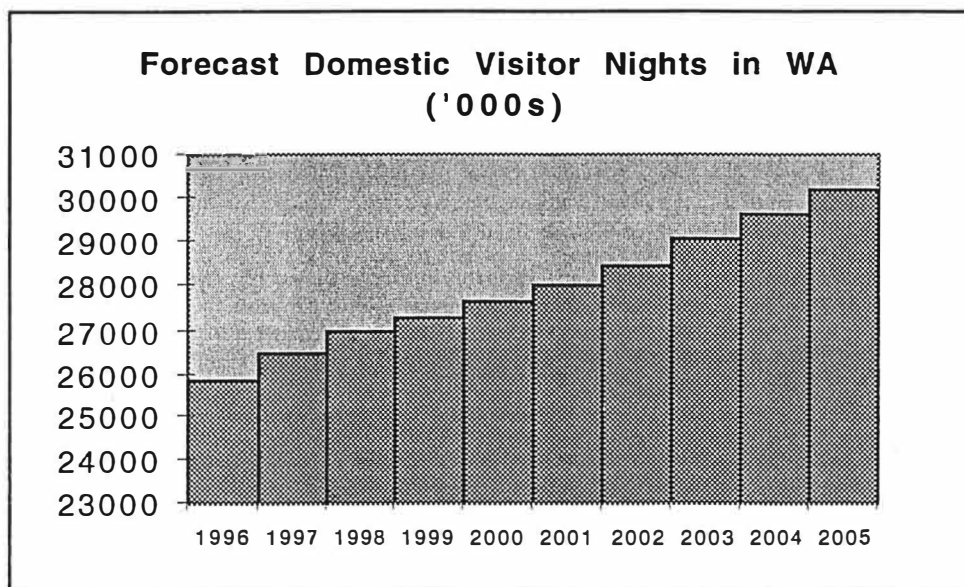
Specific Sites: Data collated by CALM from specific parks and sites indicate visitor growth has varied (Refer below):



2.3 Forecast Growth

Domestic Visitors

Domestic visitor nights within Australia are forecast to grow by 2% per annum to 30 million domestic visitor nights in 2005. (Tourism Forecasting Council). As most domestic tourism activity is generated by intra-state tourists, primarily within a three hour radius of the major population centres, the highest proportion of growth in Western Australia is likely to be around Perth and the south-west of the State. The Western Australia Tourism Commission estimates intra-state tourism will increase by 8%, between 1997/98 and 2000, generating 5836000 visitations by the year 2000. Interstate visitations are expected to increase by 14% to 668100 visitors by the year 2000 (WATC).

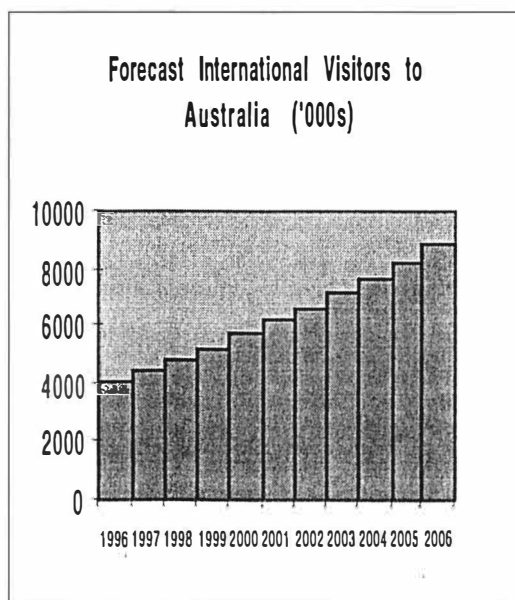


Tourism Forecasting Council

International Visitors

592 million international tourists travelled the world in 1996 according to estimates by the World Travel and Tourism Council. This is an increase of 4.5 % on the 1995 estimate. By the year 2000, international tourist numbers are predicted to have increased to 702 million world-wide.

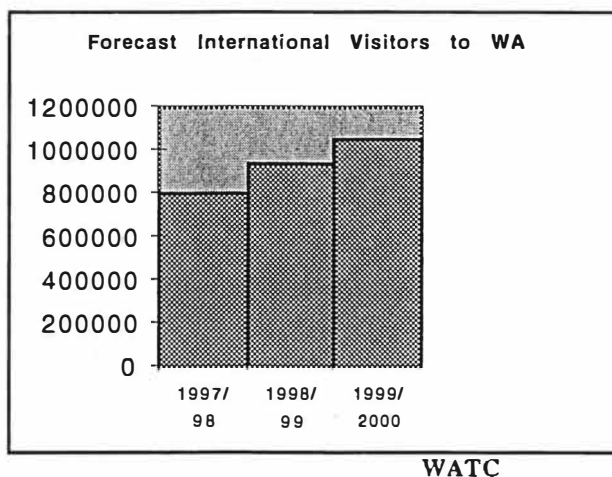
International tourist numbers for Australia are forecast to rise at an average annual rate of 7.8%, doubling from 4.2 million in 1996 to 8.8 million in 2006 (Tourism Forecasting Council).



Average Annual Growth into Australia (%) 1996 - 2006 by Country of Origin

| North America | Europe | New Zealand | Japan | Other Asia | Rest of World | Total Average Annual Growth |
|---------------|--------|-------------|-------|------------|---------------|-----------------------------|
| 4.5 | 7.2 | 1.8 | 6.7 | 11.5 | 7.8 | 7.8 |

International tourists to WA are forecast to rise by an average 15% a year, generating more than 1056000 visitors by the year 2000 (WATC). While the economic downturn in Asia is expected to have a significant impact on tourism numbers, a shifting in marketing emphasis by federal and state tourism authorities is likely to see stronger growth in the European and American market sector.



National Park Visitors

No forecast estimates have been made of visitations to CALM properties, however, based on existing visitor number patterns, an anticipated increase in national and international visitations, the increasing desire for tourists to add a "natural experience" to their holiday, and the increase in marketing emphasis towards the parks, visitations are likely to increase beyond the 2% growth currently experienced. Of course growth in visitations will vary from park to park depending primarily on their location, their appeal and the way they are positioned in the marketplace.

2.4 Major Trends

Major trends which will have a significant impact on visitor growth patterns to national parks include:

- Increasing awareness, interest and value of nature
- Australia's increasing population
- An increasing leisure market, particularly with Australia's ageing population
- Increasing disposable incomes
- A more mobile population
- Increased marketing emphasis for population to explore "their own back yard"
- Increasing emphasis on visiting friends and relatives
- Development of "the discerning traveller" with increased expectations and pursuit of an experience that offers value for money.
- Growth of nature based/Eco tourism/adventure markets
- Development of nature based tourism infra-structure
- Globalisation of tourism information and changes in holiday planning process
- Improved transport and services
- Strengthening of regional identities and specific sites.

2.6 Market Profile

Critical to developing a marketing strategy is the need to establish a market profile of current and potential visitors in terms of their gender, age, education, travel grouping, disposable income, motivation, activity, awareness, time allocation and expectation.

Once the market segments are identified, appropriate strategies can be created to motivate the different segments to visit the parks.

Note: It should be recognised that qualitative research on park visitations is minimal, severely limiting the scope of the profiles.

2.6a Visitor Age

Based on CALMs Recreation and Tourism Survey of primary national parks (VISTAT 1996) visitor age was directly relative to the parks vicinity to Perth. Of the visitors attracted to the Perth metro area parks, more than 70% were under 40 years old (46% were between the ages of 15 and 39. Visitors under 15 represented a high portion of the survey indicating high family visitation.

In comparison, 49% of the visitors to the Midwest, Pilbara, Kimberley, Goldfields and Southcoast parks were 40 years old and over (20% of visitors were 60 years old and over.

2.6b Visitor profile based on leisure preference

While no Activity Segmentation has been undertaken on visitors to W.A national parks, a study commissioned by Parks Victoria, provides a profile of primary visitor segments based on leisure preferences:

Natural adventurers

Young singles and family groups who enjoy the great outdoors. They enjoy physically demanding and adventurous national park activities.

Escape to Nature

Older Families and older couples with higher income and education levels. Their need for escaping the pace of everyday life a desire for solitude is their key motivation.

Young Thrill Seekers

Young singles and couples who are highly active in the leisure time pursuits. They enjoy the adrenalin rush of physically demanding activities.

Out and About Seniors

Mature, socially active older people who are retired or nearing retirement. Most likely to enjoy day tripping for picnics and scenic driving.

Nature Made easy

Mostly family groups and older couples. High social component, comfort is a key factor.

Social Relaxers

Mostly members of young and middle aged and family groups, especially females. They desire social activities which involve being with family and friends but do not really enjoy physical activities or "the great outdoors".

Family Focused

The main focus of these young and middle aged families revolve around family activities. They are not interested in socialising or being active in their leisure time.

Home Based Seniors

These older couples and mature singles are not interested in being involved in physical activities. They are interested in spending time with families possibly as an observer rather than as participants.

Indifferent youth

Young singles - mostly males - desire freedom and independence of company and their friends. They are not interested in physical activity and lack empathy with nature.

While the preceding segmentation may be a guide to the people visiting W.A parks, it needs to be recognised that park visitor segmentation's are likely to be specific to each park and will be influenced by a range of factors including location, park appeal and facilities.

2.6c Duration of visit

In terms of time allocation, there are three distinct segments -- people visiting for half a day, those visiting for a full day and those visiting for multiple days. Again specific park research has not been undertaken, though it is likely the majority of visitations would be half or full day

2.6d Expectation/satisfaction level

Based on the response of visitors to W.A's primary national parks (CALM VISTAT Survey 1996) expectations of respondents were well met with visitors recording a satisfaction rating of more than 90%. Respondents listed Natural beauty as the most satisfying aspect of their visit, followed by the presence of CALM staff, the park's remoteness, the wildlife and the activities.

2.6e Visitor expenditure

There has been no research conducted on visitor expenditure in W.A national parks, however some indication can be gained from tourism authority research which suggests International visitors to Australia spend an average \$80 a day while domestic tourists spend an average ...a day. The research indicates most visitors are prepared to spend money on a souvenir of their visit. Visitor expenditure is influenced by a range of key factors including availability of saleable items, visitor satisfaction, competition and cost.

2.7 Competition

From a marketing perspective, CALM faces increasing international and domestic competition for visitors to its sites. International destinations throughout the world, and States and territories throughout Australia have recognised the importance of their natural assets in terms of attracting increased visitor numbers.

According to the World Tourism Organisation, few tourists undertake a holiday solely to visit nature however, an increasing proportion of tourists are including a “nature component” to their holiday itinerary. This being the case, outside of the state, the appeal of CALM’s sites, and the likelihood of winning increased visitor numbers is directly related to Western Australia’s profile and appeal as a holiday destination. Domestically, Western Australia is currently rated sixth against other states and territories in terms of its appeal as a holiday destination. Research also indicates that in a number of international markets, Western Australia is rated as the most desirable destination. While no comparative measure has been made of state national parks, a “Nature experience” rates highly in visitors most desired experience of W.A.

Within the State, CALM controls most of the primary natural assets, so there is minimal competition, however, competition for the tourist dollar -particularly given nature ranks as the most sought after experience in WA - is high.

2.8 Market Perception

There has been no qualitative research to indicate the market’s perception of CALM estate in terms of its profile or understanding of the range of experiences available.

2.9 Target Market Segments

Using the Victorian model for visitor segmentation, there are particular market segments which should be targeted by the marketing strategy. Those segments include visitors who have a high appreciation and value of the natural estate, those who are likely to be readily influenced by a marketing strategy, visitors who are prepared to pay more for an exceptional experience, and visitors receptive to learning more about the estate.

While the marketing strategy is likely to impact on all market sectors, the following marketing segments will be targeted in the strategy:

Natural adventurers
Escape to Nature
Young Thrill Seekers
Out and About Seniors
Nature Made easy

Note: for definition refer to Section 2.6b

It should be emphasised that specific target market segmentations for the CALM estate will be determined following the proposed qualitative research.

PART ONE SECTION THREE MARKETING CONSTRAINTS

- 3.1 Introduction**
 - 3.2 Background**
 - 3.3 Situation Assessment**
 - 3.4 Marketing expenditure to date**
 - 3.5 SWOT Analysis**
 - 3.6 Why does CALM need a Tourism Marketing Strategy**
 - 3.7 Key Constraints**
-

3.1 Introduction

The purpose of this section is to assess CALM's current marketing effort and determine whether a marketing strategy is needed. It is also to identify the strengths, weaknesses, opportunities and threats to CALM in terms of developing a marketing strategy, and to anticipate any constraints which are likely to develop.

3.2 Background

In 1995 the state government vested authority in CALM to retain all of its income, a decision which saw the department begin to adopt a commercial orientation to the way it went about its business of "providing world class recreation and tourism opportunities, services and facilities while maintaining in perpetuity Western Australia's natural and cultural heritage." The decision recognised the potential for CALM to reduce its dependency on State funds and generate its own income which could be reinvested into its programs to achieve its objectives.

CALM's evolving commercial orientation has had a significant impact on the department's Recreation and Tourism Program which has identified the opportunity to generate increased revenue from visitations to its assets. The Recreation and Tourism Program recognised that with a finite budget which barely provided for adequate maintenance of the parks, increasing tourist demand on sites and the overriding desire to protect the natural assets which had been entrusted to the Department, new measures would need to be initiated. In this changing, and financially competitive environment, marketing of its tourist product was seen as an essential tool in the Programme's management process.

3.3 Situation Assessment

CALM has made a considerable contribution to the WA's tourism industry and communities throughout the State. It has opened the CALM estate to the development of tourist product, increasing the number of tourism operators from 40 to more than 250 in five years. It has built visitor centres and tourism facilities, increased road access and built significant tourism features such as Tree Top Walk which have made a substantial contribution to the economies of surrounding communities. It has also provided a range of high quality information to tourists through its publications and interpretative displays, its CD ROM and Internet site.

In the past 18 months particularly CALM has begun working closely with the tourism industry, developing stronger links between its regional offices and regional tourism authorities. At a state level, it has established a Tourism Industry Reference Group to address any industry issues and it has signed a Memorandum of Understanding with the Western Australian Tourism Commission to improve communication and efficiencies.

CALM's tourism marketing effort to date, however, has been inconsistent and has had a minimal impact in terms of delivering on the key objectives stated in this strategy.

The profile of the CALM estate in the domestic and international marketplace is generally weak (with the possible exception of icons such as the Bungle Bungles and the whalesharks), awareness of the range of experiences which are available is low, and understanding by the tourism industry of CALM's involvement in tourism and marketing is, at best, confused. In terms of resourcing, the potential for the estate to generate funds is untapped, regional marketing initiatives lack co-ordination and tend to be responsive rather than pro-active, and there is a lack of strategic direction to development of "soft" tourism product and the provision of services to tourists (Refer SWOT analysis and summaries following).

These symptoms reflect the absence of both an effective tourism marketing strategy and the commitment needed to see it implemented.

It should be reiterated that some of the marketing projects initiated by CALM have been exceptional in their own right -- its publications, Internet Site and CD ROM in particular.

But, like playing a game of golf with only an exceptional putter, if you haven't got the appropriate range of clubs, it's going to take some time to make it onto the green!

3.4 Current Marketing Expenditure

It is difficult to establish what CALM currently spends on marketing its estate. No specific budget has been set aside for marketing and many of the information based products produced by CALM's Corporate Communications Program serve dual purposes.

Assuming, however, the following initiatives which qualify as recognised marketing vehicles form part of CALM's marketing commitment to date, it is reasonable to suggest that CALM has spent at least \$140,000 on marketing activities over the past 12 months.

| | |
|-------------------------------|----------|
| Magpapers..... | \$35,000 |
| Regional advertising..... | \$40,000 |
| Promotions..... | \$10,000 |
| CALM industry Newsletter..... | \$ 3,000 |
| CALM's CD ROM..... | n/a |
| Internet Development..... | \$ 4,000 |
| Two part time staff..... | \$50,000 |

* Note: No reference has been made to the promotional value of commercial publications, merchandising or Landscape Expeditions, and no assessment has been made on CALM's financial commitment towards provision of information and product development which would be substantial

3.2 SWOT Analysis

A workshop involving senior management identified the following primary Strengths, Weaknesses, Opportunities and Threats.

| | |
|--|---|
| <p>STRENGTHS</p> <p>Natural Assets People Limited competition Innovation Diversity of product Expertise/knowledge base Tourism infra-structure</p> | <p>WEAKNESSES</p> <p>Low awareness of CALM estate Lack of marketing direction Lack of funds Attitude to tourism (internal) Lack of co-ordination Lack of expertise in development of tourism product/marketing Small population base</p> |
| <p>OPPORTUNITIES</p> <ul style="list-style-type: none"> - To increase awareness of CALM assets - To form partnerships with the tourism industry - Growth of nature based market - Revenue generation - Development of an integrated tourism strategy | <p>THREATS</p> <p>Poor communication Shifts in government policy High demand on product Lack of community support Lack of co-ordination (internal) Lack of financial commitment</p> |

Strengths

In a marketing sense, CALM is in a strong position to realise the objectives stated in the proposed marketing strategy. CALM manages a natural product of worldwide significance which is highly desirable to international and domestic markets. Easy access is provided to the estate, a range of infra-structure and services is available and it is supported by dedicated staff with a broad range of expertise which is receptive to learning about tourism and the ways it can be managed to protect the parks and improve visitor experience.

Weaknesses

There has been a lack of commitment, direction and co-ordination to CALM's tourism marketing effort.

While there has been a clear movement towards embracing tourism at senior levels within the department, there is a general perception - both internally and externally - that tourism will only place greater strains on the State's natural resource and that marketing is the Western Australian Tourism Commission's job, not CALM's.

In virtually all key audiences there is confusion about where CALM sits in regard to tourism. A Memorandum of Understanding has been signed between the WATC and CALM which begins to establish a relationship between the two departments and the tourism industry, however, there remains a strong need to clarify that relationship at a regional level where it impacts on the tourism industry, tourism industry bodies, local government authorities and other government agencies.

While a range of tourism marketing initiatives have been undertaken by CALM, they have not been developed as part of an overall marketing strategy which fits within CALM's policy framework. Similarly, some site specific marketing plans have been developed, yet none has been integrated into a statewide strategy.

In terms of funding, a dedicated marketing budget has never been set by CALM. projects which can be defined as tourism marketing initiatives have been initiated primarily to provide information, not necessarily to promote CALM's tourism product.

CALM's commercial emphasis has resulted in a strong demand for marketing expertise, both within CALM and by tourism stakeholders, which has not been matched by its human resource. Demands placed on part-time staff have been unrealistically high in terms of developing and delivering a comprehensive tourism marketing strategy.

Opportunities

Both the international and domestic market is growing and interest in nature based tourism is increasing. The tourism industry and other government and non government tourism agencies are active and keen to establish partnerships with CALM that work towards mutual objectives.

In short, the time is well suited for CALM to take both a leading, and supportive, role in partnership with the tourism industry to protect, develop and promote the state's natural tourism product.

Threats

The threats to CALM's involvement in tourism relate strongly to its perceived weaknesses. The process is vulnerable to a lack of an appropriate funding commitment, shifts in government policy, lack of industry support and internal and external communication breakdowns.

3.6 Why does CALM need a tourism marketing strategy

Marketing is a critical management tool in the development of the CALM estate. It directly influences visitor flows, environmental and economic impacts, standards of service, development of infra-structure and the quality of visitor experience. It largely determines how many and what type of people visit the estate, how long they stay, when they visit, their expectation and experience, and their level of contribution towards maintaining the estate.

The development of a sound, integrated tourism marketing strategy for CALM's Recreation and Tourism Program is important for the following reasons:

- It will significantly contribute to delivering the key objectives identified in CALM's Recreation and Tourism Strategy - "People in CALM Places".
- It gives clear direction to all stakeholders on the way CALM will be promoting, developing and protecting its natural assets.
- It promotes partnerships at a regional and state level which marshals resources from both within and outside the Department to achieve its objectives.
- It sets direction and provides a framework within which each of its assets can be managed to optimise their opportunities.
- It improves efficiencies and maximises outcomes.
- It provides for an informed, decision making process in terms of prioritising resource allocation towards promoting, protecting and developing CALM's tourism assets at a regional and state level.
- It provides leadership and direction to the tourism industry and substantially strengthens the state's nature based tourism initiative.
- It provides measurement indicators on which strategies and methodologies can be modified to ensure key objectives are realised.
- It will become increasingly important as market and industry demands on the estate increase and CALM's tourism product evolves.

3.7 Key Constraints

Drawing from the consultative process, following are the key constraints which are likely to impact on CALM's Marketing Strategy.

Lack of Resources

CALM has a finite financial and human resource to manage its assets and huge demands in terms of servicing them. As indicated earlier, a budget has never been set aside for tourism marketing. Should CALM recognise the benefits of implementing a tourism marketing strategy, a realistic financial commitment (Identified in Part Three Section one) and staffing commitment (Identified in Section Five) will be required in order for it to realise its objectives.

Internal Resistance to Tourism

As indicated in the SWOT analysis there is some confusion and resistance within CALM towards embracing tourism. As the development and implementation of the marketing strategy will be heavily reliant on CALM management and staff, their resistance could be a significant constraint to the strategy.

Commercial profit vs Public Service

CALM's corporate objectives are far broader than making a profit, a philosophy which will inevitably provide some constraints to the business of marketing its sites to tourists. It is understood that CALM's core business is to provide a service to the community in terms of protecting the natural assets, increasing public awareness, improving education and maintaining and upgrading facilities. To what level that responsibility will impact on the marketing strategy and its objective to generate income which can be channelled back into the CALM estate, will need to be determined.

Public and industry perception and support

As identified in the consultative process, there is a significant portion of the public and the tourism industry which believes CALM has no role in marketing its assets. The consequences of this resistance is likely to be a major constraint on the strategy.

Communication Constraints

It is apparent that communication between Programmes on a range of tourism related initiatives has not been effective. Clear communication between programme heads and key personnel will be necessary for CALM to realise its marketing objectives.

Development Constraints

As indicated earlier, implementation of the marketing strategy will be heavily reliant on the ability of CALM's tourism product to meet the expectations of its visitors. The evolution of CALM's tourism product in terms of it being able to manage increased tourist numbers will be a significant constraint on the marketing strategy's promotional program.

All of the identified constraints will need to be considered and addressed in the strategy.

PART TWO SECTION ONE **MISSION STATEMENT AND MARKETING OBJECTIVES**

4.1 Introduction

The following two sections define the mission statement of the strategy, its primary marketing objectives and the strategies and methodologies which will be employed to realise them.

4.2 Mission Statement

MISSION STATEMENT

**TO PROMOTE AND PROTECT WESTERN AUSTRALIA'S
NATURAL AND CULTURAL HERITAGE WHILE
OPTIMISING THE ECONOMIC OPPORTUNITIES FOR THE
CALM MANAGED ESTATE AND ENHANCING VISITOR
EXPERIENCE.**

4.3 Primary Objectives

OBJECTIVES

- To increase awareness of the CALM managed tourism assets**
- To increase tourism revenue generated by CALM managed tourism assets which can be channelled back into the CALM estate**
- To enhance the experience of visitors to CALM estate.**
- To develop strong partnerships with the tourism industry**
- To develop viable and ecologically sustainable tourism product within the CALM estate**
- To ensure the strategy is consistent with CALM's corporate objectives of conserving the State's natural assets.**

PART TWO SECTION TWO PROMOTIONAL STRATEGIES AND METHODS

- 5.1 Introduction
 - 5.2 Research
 - 5.3 Planning
 - 5.4 Promotional Strategies and Methods
 - 5.5 Partnerships
 - 5.6 Key outcomes
-

5.1 Introduction: The following section identifies the preliminary research and planning which will need to be undertaken and the promotional strategies and methods which will be employed to realise the stated objectives.

Note: This section is to be re-enforced by the following Product Development Strategies section

5.2 Research

Strategy: To create a clear profile of existing and potential visitors which will form the foundations of the promotional strategies.

Method: To undertake qualitative research which clearly identifies what motivates existing and potential markets to visit W.A's national parks.

There has been no qualitative research undertaken by CALM to determine what interests and motivates its existing and potential markets. Such research is critical to the formulation of an effective marketing strategy. The market segmentation would create a clear profile of WA park visitors, and prospective visitors, in terms of their awareness of the range of experiences available in W.A National Parks, their expectations and their key motivations.

While generic research of visitors to WA's national parks should be undertaken, attention should also be given to creating a simple research model which can be applied to individual parks or sites likely be involved in the promotional push.

5.3 Planning

Strategy: To produce a statewide promotional strategy which integrates the marketing plans of CALM regions.

Methods: By working with CALM regional managers and Recreation and Tourism Program leaders to develop regional and site specific marketing plans which both draw from, and strengthen, CALM's overall marketing strategy.

The underlying philosophy of this strategy is to strengthen the overall marketing effort by avoiding duplication, improving communication, simplifying and streamlining the marketing planning and implementation process, sharing resources, expertise and experience and standardising methodology. It recognises the diversity of CALM's tourism product and the need for site/park specific marketing plans.

Progress of this strategy has already taken place with the staging of a Marketing Strategy Conference involving key CALM personnel. Marketing Plan Templates were circulated and regions have been invited to produce their own marketing plans.

The Conference now needs to be followed up, to identify which regions/sites have a plan and which regions/sites will need assistance. With the overall marketing strategy developed, emphasis can be focused on strengthening the template and developing synergies to ensure the plans and the strategy are complimentary. While the template will form a framework for the marketing plan, it is understood that regions and sites will vary considerably in terms of their markets, their marketing emphasis and their marketing strategies. However, while the ingredients will vary, the methodology will essentially be the same.

Benefits passed onto the regions and site managers of an integrated marketing strategy include:

- Access to marketing expertise and planning assistance
- Access to creative resource
- Access to market intelligence
- Access to Co-operative marketing opportunities
- Cost sharing opportunities
- Information sharing
- Cross promotional opportunities
- Training
- Prioritisation of funding assistance

Ways in which the integrated marketing strategy strengthens CALM's profile

- By providing consistency to the marketing effort
- By streamlining the marketing management process
- By creating an effective regional marketing network for the CALM estate
- By producing a consistency in the estate's promotional profile
- By saving costs by resource sharing.

Specific marketing plans will be written (or modified for integration into the marketing strategy) for each specific CALM product including Hills Forest, Landscape Expeditions, Penguin Island, Treetop Walks, Perup Wilderness Lodge, Yanchep Inn and the Aboriginal Unit. Priority should be given to the plans so site manager's can action initiatives and grow their products within the mutually beneficial framework of CALM's marketing strategy.

Methods: To establish a network of staff personnel who will have included in their job description a dedicated tourism marketing component. The component of the Recreation and Tourism Program Leader's job description will be standardised to reflect the duties and responsibilities required to develop and implement the regional marketing plan.

It is anticipated each regional/site plan will be developed in close consultation with centralised expertise who will visit each region to ensure the plans are complimentary to the marketing efforts of regional tourism bodies, WATC regional offices, Development Commissions, tourist bureaus and local government authorities.

Once a year the designated personnel will be brought together for a CALM Regional Marketing Workshop to share information, acquire new training and evaluate and improve on their plans.

Strategy: To ensure promotional emphasis is effectively placed on properties able to sustain increased visitations

Methods: By producing a Marketing Matrix which weights CALM's promotional effort according to the peak, shoulder and trough traffic flow periods of regions and specific areas.

In each of its regional marketing plans, CALM will seek to gauge traffic flow into specific sites to determine the periods of promotion likely to produce optimum results. The statewide matrix will also determine which properties are able to sustain increased tourist numbers and at what times, which properties will require specific infra-structure development or assistance before further promotion should take place, and which properties have a high profile and could not sustain larger visitations (in which case high yield/low volume marketing strategies would need to be considered).

The matrix will categorise CALM's tourism assets into Established, Emerging and Undeveloped sites (Refer Product Development Strategies)

Strategy: To monitor the impact of the marketing strategy on an on-going basis.

Method: By establishing an accurate research model to measure the qualitative and quantitative impact of the marketing strategy.

While the tactical elements of the strategy are likely to deliver short-term, measurable outcomes, an appropriate research model will be established to measure the strategy and adjust it where appropriate to deliver on its key objectives of increasing general awareness of the CALM estate and improving the quality of the experience.

Measurement of the outcomes will provide direction to the on-going strategy.

5.4 PROMOTIONAL STRATEGIES

Key objective and strategies summary:

OBJECTIVE

TO INCREASE AWARENESS OF CALM MANAGED TOURISM ASSETS

STRATEGIES

- To create a distinct profile for CALM's tourism assets.**
- To substantially improve and increase the visual profile of CALM's natural attractions.**
- To increase the media profile of CALM's natural attractions.**
- To broaden the profile of CALM's tourism product.**
- To influence the decision making process of visitors to WA.**
- To strengthen travel trade awareness of CALM's tourist product.**
- To encourage cross promotion of national parks and sites.**
- To encourage visitors to extend their stay and/or return to CALM sites.**
- To encourage word of mouth promotion of the Estate.**
- To promote convenient access to CALM's tourism product.**

Strategies and Methodologies

Strategy: To create a distinct profile for CALM's tourism assets

Method: By building on key design elements which currently exist in CALM publications to create a "branding" or creative theme which will distinguish all CALM's promotional collateral.

There is benefit to be gained in a marketing context, from CALM produced promotional publications - both free information and commercial - having a “look” or identity which distinguishes them from other, similar products. The branding would strengthen CALM’s public profile, re-enforce its commitment to high quality publications, and see the products benefit from a strong association with national parks and environmentally conscious practices.

This could be achieved not by undertaking a separate and costly branding exercise - but by strengthening existing creative devices developed by CALM and building them onto any new materials.

The creative elements used in publications produced by CALM are of an exceptionally high standard and should be developed further and carried through to any new publications or products produced as part of the marketing strategy.

Note: Consideration should be given to highlighting the profile of “National Parks” in all external promotion and capitalising on its worldwide reputation and association with protection, conservation and quality experience. While CALM’s corporate presence will be consistent on all promotional collateral, it’s profile in most cases should be subtle and used with varying degrees of prominence depending on the medium and its target market.

As has been the practice to date, strict design controls would need to be followed. Should demand for branding application exceed the ability to administer it, consideration should be given to development of a Production Manual with design specifications.

It is anticipated the branding will be applied and slowly introduced to a range of applications including publications, merchandising, packaging, interpretative information and interpretative displays.

Method: By developing a positioning statement which distinguishes WA’s natural assets.

The positioning statement (ie: “The Seven Wonders of W.A”) strengthens, links and re-enforces the profile of the products being promoted, and would run throughout all promotional collateral.

A creative process should be undertaken to devise the positioning statement based on the qualitative research undertaken which can be applied to all the promotional collateral developed as part of the strategy.

Method: By re-enforcing several key messages and where appropriate, validating them in all of the promotional collateral:

In a world full of information, it is important to provide a simple and consistent message which re-enforces the value of the experience. These messages should be consistent, and promoted at every opportunity. While the exact words will vary according to the product and medium, the essence of the messages would be:

- That Western Australia’s natural product is unique and attractive by world standards.
- That Western Australia’s natural product is diverse.
- That Western Australia’s natural product is safe and accessible.
- That visiting Western Australia’s natural product is an exceptional experience.

Method: By identifying and promoting seven key assets which will be the State's natural tourism icons.

While there are more than seven exceptional properties throughout W.A, it will be important from a national and international market perspective to simplify and re-enforce the visual message that W.A 's national parks are unique and attractive. All W.A properties will benefit from the higher national park profile.

The seven properties will be distinctive to Western Australia and will be central to the promotional strategy. High quality photographs will be generated and promotional collateral will be built around a distinctive visual identity. Each of the properties will be tagged by a consistent promotional message for example "The Seven wonders of WA", which, again, will run throughout all the promotional collateral.

A preliminary survey identified the seven likely icons to be: The Bungle Bungles, Karijini, Ningaloo, Valley of the Giants, Cape Naturalist, Nambung and Shark Bay.

Strategy: To substantially improve and increase the visual profile of CALM's natural attractions.

Method: By producing a range of exceptional photographs of seven key sites in the CALM estate which can be applied to a range of promotional opportunities.

Tourism is all about imagery . While words are strong motivators, it is an image which is most likely to translate into desire in the highly competitive tourism marketplace. CALM will produce seven outstanding images of its estate which will be used for both promotional and commercial purposes. The images will be the visual foundation of the promotional strategy.

Method: By establishing a high quality image library of W.A's national parks and making it available to operators and publishers.

CALM will seek to develop its own library of exceptional images which will either be commissioned or bought. While it is anticipated several key images will be used exclusively by CALM for both promotional and commercial purposes, a range of high quality photos owned by CALM will be transferred onto CD ROM and made available to industry and media at a nominal fee (ie reproduction). The initiative will exploit a vacuum in the marketplace for high quality images which will translate into literally thousands of dollars worth of free exposure in some of the most influential tourism publications in the world. CALM's images are likely to be sourced and used in publications produced by state and federal tourism agencies, major national and international tour wholesalers, inbound tour operators, local tour operators and a wide range of national and international media.

Strict user guidelines will be established to ensure quality control of the images and their usage.

As the imagery will be the visual foundation of the programme's promotional strategy , appropriate resources will be allocated to securing seven outstanding photographs and a range of high quality seconds.

It is anticipated maintenance of the slide library will be outsourced.

Method: By producing promotional collateral which will highlight and re-enforce the appeal of the CALM estate.

CALM already produces a stable of exceptionally high quality publications which have been developed to meet information demands at a range of different levels. The publications, which are also effective promotional tools, include its flagship publication Landscape, a saleable series of three primary regional soft cover publications, an extensive range of small information brochures specific to each estate which are handed out free of charge, and a range of other saleable publications produced in line with market demand.

There is scope, however, to develop additional collateral which can be used for promotional purposes to address the objectives of the marketing strategy:

A series of high quality posters

A series of seven high quality posters will strengthen the appeal of WA's National Parks and re-enforce the diversity of the product. (The posters would be selectively distributed for display at travel agents and key tourist information outlets and sold at commercial outlets).

CALM National Park Motivational Brochure

An A4 full colour, six page gatefold, National Park brochure. The highly visual brochure - an extension of the images used in the posters - would be aimed at strengthening the international profile of WA's national parks and re-enforcing the message of the WATC, regional tourism associations and nature based tourism operators.

The brochure would be distributed through the offices of the WATC in key markets, used at specialised Nature Based tourism promotions attended by CALM and provided to CALM's commercial sites/entities to strengthen their profile with international and domestic inbound and wholesaler operators. The brochure would point to CALM's Internet site for more detailed information

Promotional display Stand

The display would provide a distinctive promotional backdrop at holiday and travel shows (Refer Promotions) attended by CALM personnel. The display would be modular in design so it could be expanded to include, and strengthen the profile of specific CALM sites. The display would be used at major consumer shows in W.A or shopping centre promotions.

Hand Out/ Direct Mail Update

As one of the strategy's primary objectives is to broaden awareness of CALM product beyond the established icons, encourage repeat visitations and expand the visiting patterns of the intra-state market, once a year, a high volume publication will be produced highlighting lesser known opportunities and new products. (The four page publication would be similar in look and design to the Magpapers currently produced by CALM). The "What's new to do when you're outdoors" type publication would be handed out at major intra state holiday shows and direct mailed to target markets sourced from the Park Pass Data Base.

A 30 minute promotional video (promotional purposes only)

The video would be an edited compilation of national park segments of the television series Our W.A (Footage owned by the WATC/Channel 7). The video would be produced in two 15 minute segments, one segment on the northern parks, one on the southern parks. Either segment would lead the video depending on where it was being screened (ie in the north or south). The videos (replay, back to back) would be distributed to CALM Visitor centres and tourist bureaus where facilities were available for them to be screened. Both sections would point to available publications or CALM's internet site for more information.

Adventure Brochure.

CALM will produce an adventure brochure that highlights the high energy experiences available in the CALM estate (abseiling, caving, rafting, mountain biking, orienteering, horse riding, skin diving etc) . The two colour adventure brochure's key message will be "look what there is to do; how many of them have you done" Direct contact details will be provided. The brochure will be designed in a racy, magazine style format to appeal to the active, adventure orientated W.A resident or tourist. Operators will be encouraged to identify or create specific adventure opportunities. Co-operative financial support will be sought from industry.

Method: By producing a state-wide advertising campaign which will impact on the Estate's intra-state market.

Consideration should be given to developing a co-ordinated advertising campaign which would unfold in stages to promote CALM's natural assets. The campaign would be strong in a generic sense and yet flexible enough to be adapted to various parks throughout the state. The campaign would be developed to increase awareness and produce direct, measurable results for CALM sites.

While the creative content of the campaign is outside the terms of reference of this document and will be directed by the qualitative research, the following option has been developed as a guide:

Newspaper campaign

Medium/ Timing: The campaign would involve the print media, possibly some television, and run for about two weeks at a time, scheduled to tie in with specific events or shoulder periods (either side of peak tourist traffic periods). A three month lead time would be required.

Due to financial restraints, a pilot campaign would be developed and the principles applied to other parks as resources were made available.

Creative: The campaign would be built around the various experiences available on the CALM estate, using the park environment as a spectacular backdrop. The campaign's "visual signature" would be a uniformed CALM Park ranger (Existing CALM research indicates ranger presence, next to natural appeal, is the biggest tourist drawcard to national parks). Think three quarter page ad, black and white photo, Ansell Adams style picture, clean white type.

Focus would be placed on strengthening the appeal of parks/sites and motivating intra-state market to broaden their experience by visiting different sites.

Example One:

Image: Cute Japanese Kid - mouth agape - surrounded by towering tree trunks and looking upward into a fantastic forest canopy. Uniformed park ranger kneeling beside him. Parents in the background.

Caption: “ 10 year old Ibuko Tosaka’s parents have travelled half way around the world so he could get this close to nature -- In Perth you’re just a few hours away.
Valley of the Giants- Pemberton.

Example Two:

Image: Cluster of kids at the bottom of a gorge in Karijini gathered around a ranger (Maitland would be great!) - one kid jumping into the foreground doing something silly and eye-catching.

Caption: “It’s 3.30pm in a two billion year old classroom but no one (not even Frankie) is thinking of going home.
Karijini National Park -- a memorable excursion and just two days drive from Perth

Alternatively CALM could extend the concept of its posters into a newspaper campaign. (Concept elements to be presented to Corporate Executive)

Of course the preceding samples are just guides and would need to be based on appropriate market research. While the message would be subtly indicate - “Ranger’s are knowledgeable and proud custodians of our unique, natural environment -- come and share the experience.” - emphasis should be placed on producing a clever, highly personable campaign.

Co-operative Partners: Consideration should be given to producing a pilot campaign (Say two parks, tagged with CALM product (ie Penguin Island, Tree Top Walk etc). and gauging the response. With its proven success, the campaign could then be expanded to involve other parks, the WATC, RTA’s and operators. The campaign could, for example, be tied to the WATC’s northern and southern intra-state promotion. The WATC could build a composite co-operative page with RTA’s and operators under the banner “Holidays of an Entirely Different Nature”. Editorial would be negotiated to strengthen the campaign.

Outcomes: The likely external outcome would be a high, positive profile for CALM and CALM sites and a direct, measurable result for co-operative partners. Internally, the campaign would be a great morale booster for CALM rangers and promote a positive relationship between CALM and the tourist public.

Once a creative template was created, it could be applied to different parks or sites - and different print mediums according to need and available funds.

Strategy: To increase the media profile of CALM's Natural Attractions

Method: By targeting and influencing key media likely to impact on the strategy's primary audiences.

A media "hit list" which identifies key publications and television/radio programmes that impact on the strategy's primary target markets will be produced. An Editorial Library will be created, built around Park Fact Sheets and Editorial Profiles on each of the established and emerging national parks.

An Electronic Media Kit will be developed for access through the Internet.

Emphasis will be centred on providing a flow of editorial to suburban/country/ and free newspapers throughout the state and stimulating editorial opportunities in targeted magazines, high circulation newspapers and electronic media programs.

The editorial will be complimented by access to high quality images from CALM's Image Library which will be translated onto CD ROM for easy access. To minimise expense, the CD ROM's - like library books - will be able to be borrowed and returned after use.

A National Park Media Familiarisation program will be developed. Regional managers will be canvassed to determine which parks are prepared to participate in program. The program's schedule will be developed in consultation with regional tourism associations on an annual basis so resources can be shared. All media participating in the program will be appropriately screened to ensure maximum exposure is provided.

Emphasis will be placed on complimenting and strengthening only the media familiarisation initiatives of the ATC and WATC which provide direct exposure to CALM sites and impact on the specific target audiences identified in its marketing strategy.

Due to associated costs, CALM will limit the funds it spends on advertising, preferring to undertake public relations initiatives which will increase exposure of the parks. As any advertising expenditure is likely to be strictly measured in terms of outcome, all campaigns should be tactical, aimed at producing tangible benefits to specific properties. All tactical advertising will be undertaken in line with the marketing plans produced by specific tourist product (ie Penguin Island, Valley of the Giants and Landscape expeditions). Any park specific advertising initiatives will be measured for effectiveness and assessed in terms of its application to other parks. Low cost, strategic sponsorships may also be undertaken. For example CALM could sponsor a regular section in the Travel Pages of the West which would profile Western Australian celebrities (ie Janet Holmes a Court, Terry Willisee etc) in their favourite National Park settings (not the obvious ones) in W.A. The obvious benefit would be an increased awareness of different properties.

Efforts will be made to strengthen co-operative advertising campaigns involving the tourism commission, regional tourism associations and operators with editorial and photography.

Consideration should be given to influencing the WATC's annual intra-state marketing initiatives (the northern campaign and southern campaign) to produce a quality insert/handout/direct mail tactical campaign which promotes the national parks of WA and provides a vehicle for park tourism operators. Both campaigns will be specifically tagged with product to produce direct, measurable results in terms of increased visitations.

It is anticipated the campaign will be specifically driven by the qualitative research undertaken by CALM.

Method: To develop a media promotion strategy in consultation with regional managers.

The strategy will concentrate on generating "free" editorial time or space in targeted mass media. As the media are always looking for story ideas and photo opportunities, story leads from CALM sites will be identified and listed. Emphasis will be placed on stories that provide readers/viewers with a "motivation to go there." -- holiday or tourist related news stories or human interest features that highlight the uniqueness and popularity of the parks (celebrity visits, "feel good" stories, character profiles, events, unprecedented coral spawning season at Ningaloo Reef etc). A briefing sheet will be produced for Recreational Program Managers to assist them to recognise potential media stories. Consideration should also be given to developing Park Ranger Profiles.

A workshop will also be staged for recreation and tourism program managers on "getting the most out of the media."

As the West Australian Newspaper is the most influential publication in terms of reaching the strategy's primary target audience, CALM will liaise directly with the paper's editorial department (Chief of Staff/designated roundsman) to ensure a constant flow of story ideas is provided and followed up.

Strategy: To broaden the profile of CALM's Tourist product

Method: By creating a distinct, though complimentary profile, for CALM's commercial enterprises (Valley of the Giants, Bibbilmum Track, Penguin Island).

Each of these assets should be promoted as distinct entities which are part of CALM's overall product mix. Dedicated Marketing Plans for each product should be developed. The plans would clearly identify each product's target segments and what will be done to strengthen the individual profile of each asset.

While there should be some visual link to CALM's "branding", logo's, slogan's, photography, information and merchandising should be part of a distinct product identity.

Development of all visual design elements of the identity should be centralised and strictly quality controlled to be in keeping with the high standard currently reflected in CALM publications.

Method: By promoting lesser known experiences to be enjoyed in WA's National Parks.

While simplifying the message for international and inter-state markets will be important, equally important will be the need for CALM to broaden its promotional message to include lesser known experiences, particularly for the intra-state market. High emphasis will be placed on increasing the profile of lesser known tourism product in the CALM estate and promoting the wide range of experiences available.

Particular emphasis will be placed on increasing the profile of "adventure" experiences such as abseiling, caving, mountain bike riding, orienteering, rafting, rock climbing and fishing.

An inventory of potential tourist attractions will be produced as part of each region's marketing strategy and energies will be spent increasing the profile of particular attractions in line with target segment interests.

Strategy: To influence the decision making process of visitors to W.A and increase awareness of CALM sites

Method: By identifying key points where potential visitors are likely to source holiday information, and encouraging them to visit CALM sites.

As indicated earlier, CALM will seek to work with the ATC, the WATC, the 10 regional tourism associations and wholesale and inbound travel agents to strengthen their promotional efforts outside of the state.

Within the state, however CALM will seek to have a direct impact on visitors by increasing the awareness of its tourism assets beyond the well known, more established sites through the following outlets:

- The WATC's Travel Centre
- Perth Tourist Lounge
- CALM's WA Naturally Facility
- The Media
- All CALM Visitor Centres
- Tourism Operators (Displays, brochures, videos etc)
- Hotels/Hostels
- Regional Tourism Associations which deal directly with the public
- Tourist Bureaus
- Niche market outlets (camping and outdoor stores etc)
- Social Clubs (Bushwalking adventure etc)
- Major holiday and travel shows

Consideration will be given to providing display posters, hand out materials, videos, product update presentations and specialist updates (ie fax stream promoting short notice opportunities in parks).

Particular emphasis should be placed on promoting CALM product through the WATC's Travel Centre which attracts more than 390,000 tourists a year (70% intra-state, 13% interstate and 17% international)

WATC Travel Centre.

The profile of WA's natural estate at the WATCs Travel Centre is weak, no hand out information is provided, access to information - apart from what is provided in tour operator brochures - is time consuming and inconvenient and sales of CALM product are low.

A tremendous opportunity to increase awareness of CALM's tourist product and generate revenue is available.

It is understood that the WATC is considering re-locating its Travel Centre to a more high profile location - possibly the Hay street Mall - in conjunction with the Department of Transport (and Fisheries?). This being the case, CALM should explore the opportunity of sharing space to become the "one stop tourist shop" for Information, bookings, licences and park passes.

While the advantages of CALM having a profile at the state's most frequented tourist centre are obvious, the extent of CALM's presence would need to be determined by a detailed cost/benefit analysis. A decision would need to be made on whether CALM wants to just provide information or whether it wants to generate revenue through merchandising and bookings. Should a commitment be made towards the later, CALM should look towards substantially expanding its merchandise range and establishing a WA Naturally style outlet which would adjoin the WATC Travel Centre.

Method: By attending two major consumer shows staged in WA -- The Perth Holiday and Travel Show and the Perth Caravan and Camping Show. (Collectively, the two shows attract in the vicinity of 40,000 potential visitors).

CALM will produce a distinctive, modular display stand (Refer previous section) to increase awareness of CALM product. While obvious reference will be made to key sites, given the intra-state market's likely familiarity with them, emphasis will be focused on promoting new product.

A special newsprint hand out "What's new in the Parks" (refer previous section) will also be distributed.

Method: By producing a range of information which encourages potential visitors to visit, extend their stay and return to CALM's estate.

CALM currently produces a range of information aimed at different access levels. Included in its publication stable is a "Magpaper" series, a series of DL sized brochures with maps and general details on some specific parks, and a broad range of interest specific commercial publications. Also provided by CALM is an internet site and a CD ROM both which offer detailed information.

The following table indicates CALM's key market sources, the existing information providers and the key agencies responsible for the information.

Key Outlets

INTERNATIONAL

| | Information providers | Key Impact agency |
|-----------------|---|---|
| DOMESTIC | Travel Agents Tourism Operators Consumer promotions Internet Media Word of Mouth Publications | ATC/WATC/RTA's Tourism Operators ATC/WATC CALM/WATC/ATC ATC/WATC All beneficiaries Publishers |

| | Information providers | Key Impact agency |
|--------------------|---|---|
| INTRA-STATE | Travel Agents Tourism Operators Consumer Promotions Internet Media Word of Mouth Publications | ATC/WATC/RTA's Tourism Operators WATC/RTA's CALM/WATC/ATC WATC All beneficiaries Publishers |

| | Information providers | Key Impact agency |
|--|--|--|
| | Word of Mouth Media WATC Travel Centre WA Naturally RAC Regional Tourism Associations Tourist Bureaus CALM Visitor Centres Operators Accommodation Houses Retail outlets (Outdoor Shops) Social Clubs Universities | All beneficiaries CALM WATC/CALM CALM CALM CALM CALM CALM CALM CALM/RTA's/T/Bureaus CALM CALM CALM |

Information Research/Survey

While provision of information to the international and domestic market is limited primarily to the internet, commercial publications, and the travel industry, effort should be made to ensure the broad range of information currently offered by CALM within W.A is cost effective and appropriate to the needs of the marketplace and those who seek to provide it.

Included in the proposed qualitative research should be reference to consumer needs and expectations regarding information relating to National Parks. The research should determine what level of information is expected at different points (ie Prior to departure, in transit and on location), at what level the market becomes unreceptive to paying for additional information and where the market expects to access various levels of information.

A survey of tourists information bureau's will also be undertaken to determine whether improvements can be made to the existing range of CALM provided information.

While it is anticipated the research and survey will provide direction to any changes which need to be made to the information currently made available by CALM, the following objectives are sought:

- That CALM provided tourist information be standardised in terms of presentation, quality of information, availability and cost.
- That the provision of tourist information be cost effective.
- That a base level of tourist information is established and provided by CALM on all established and emerging parks.
- That the cost to purchase any CALM provided information and the price at which it is sold is standardised (ie Some Tourist bureaus are selling site brochures while others are giving them away).

As indicated in the consultative process, there is an issue in terms of availability of the existing publications and provision of free information to tourist.

Priority should be placed on providing a base level of "free" information on all parks which would be given to all park visitors on payment of their entrance fee or purchase of a park pass. Commercial opportunities aimed at value adding visitor experience and generating income for park projects, should extend separately according to the pre-determined publication program and in line with market demands.

Strategy: To strengthen travel trade awareness of CALM's tourist product

Method: By improving the profile of the state's natural assets in the travel industry's promotional collateral and developing CALM's tourism product for inclusion to tour wholesalers and inbound tourism operator product.

As indicated in an earlier section, CALM will improve all visual reference to its tourism product and provide high quality images and maps for use in inbound and wholesale publications. CALM's posters will also be selectively distributed to all key booking outlets and agencies.

Considerable business is generated by travel agents selling holiday packages to the general public. Travel wholesalers and inbound tourism operators 'package' tourism product by combining various components such as accommodation, transport and tours. They then include those various packages into their own publications which are widely circulated and used by travel agents to sell holidays. Wholesalers and Inbound tour operators charge tourism operators a commission for their service which ranges from 10 - 30%.

CALM will work with major domestic and international inbound and wholesale suppliers including Great Aussie Holidays and Discover West to develop new product which can be sold through travel agents.

Immediate emphasis will be placed on packaging drive itineraries which take in national parks and developing an International Park Pass which provides access to all sites for international visitors and can be commissioned by wholesale operators at 20%.

Strategy: To encourage cross promotion of national parks and sites.

Methods: By ensuring all rangers are familiar with neighbouring sites and new products

Where practical, CALM managed tourist information access points should be standardised in their presentation and ample stocks of CALM promotional products should be made available. All rangers in a position to provide public information need to be conversant with the promotional material and the tourism product of neighbouring parks. An internal E- mail bulletin board should be set up highlighting up and coming attractions in different parks.

OBJECTIVE

TO ENHANCE THE EXPERIENCE OF VISITORS TO THE CALM ESTATE

STRATEGIES

To provide a range of quality information using various mediums.

To prioritise provision of basic tourism infra-structure in Established and Emerging National Parks*

To preserve the opportunity for a quality experience by effectively managing tourist visitations*

To assist tourism operators in providing the highest standards of service and interpretation to visitors*

*** Refer Product Development Strategies**

Strategy: To encourage visitors to extend their stay and/or return to CALM sites by providing a range of information.

Method: By effectively promoting within each region/park the range experiences available

Development of the regional marketing plans will identify the existing and potential tourist attractions of each park and the most effective methods of promoting them.

Convenient access and presentation of information will be of critical importance.

Provision of information within each region is currently provided by five primary means: Displays/ at CALM offices and Visitor centres, Staff interaction (ie rangers), publications, interpretative displays, or presentations by tour operators, all of which are critical to conveying the message.

Displays: Generally, visitors have an aversion to absorbing huge wads of information from static display, however the displays can be effectively used to introduce visitors to the subject and point them in the right direction for more information if they want it. The primary goal of the displays should be to highlight the different features of the park, provide a “taste” of what’s available, and motivate visitors to experience them. Having achieved that, they can then direct readers to the following sources of further information.

Staff Interaction: Visitors expect rangers and interpretative staff to have a thorough knowledge of the tourist product. While most rangers have an in depth knowledge of their product, the standards in presentation varies and there may be benefit in providing training on public speaking and dealing with tourists. Consideration should be given to developing formal information sharing mechanisms and standardising levels of service through an accredited training program (Aussie Host or TCA Quality Assurance program).

CALM’s Interpretive Unit has produced an excellent interpretative training manual for operators. Effort should be made to translate elements of the training manual into a 30 minute training video which would be circulated to all staff who have contact with the public.

Publications: Visitors expect to be able to access information (paid or free of charge) which will enrich their experience. As suggested earlier, a base level of information should be provided free of charge (with entrance fee) and additional information should be made available at a cost.

Interpretative Displays: In the absence of staff rangers, interpretative displays have a substantial role to play, not only in providing information but motivating visitors to extend their visit or return. Interpretative displays vary from location to location and while most have the obvious objective of providing information, there is opportunity to use the displays to increase a visitor’s motivation to experience the particular features of the park (ie a walk trail).

CALM will develop an Interpretative Display Template which could be applied to each site.

Consideration should be given to using photographs to indicate some of the features of the site. (Presentation will need to be standardised to ensure high quality and consistency), personalising display editorial (Keep it short, punchy and enticing) and promoting dedicated trail guides which provide more information.

Tour Operators

CALM licences more than 250 tourism operators and has experienced a 20% increase in the number of operators accessing its sites over recent years. The standard of presentation by tour operators accessing the CALM estate varies in terms of content and delivery. With ranger resources stretched, it is important that visitors are given correct and accurate information by tour operators in a professional manner. Once a year - or as required - CALM will conduct a Tour Operators Regional Workshop in which information can be shared. The one day workshop will be broken up into three sections -- information, delivery, sales techniques and discussion of key issues. The information segment may, for example, involve a presentation by a market niche expert or circulation and discussion of Park Fact Sheets. The presentation and sales technique session may involve a motivational speaker focusing on delivery of the information and sales methods or viewing and discussion of CALM's training video. The key issues section would look at the issues faced by specific parks and how they may be overcome.

The key outcome of placing emphasis on information delivery would be that the information would be accurate, consistent, practical and attractive.

Promotion should extend across all the above mediums to include information on new experiences, seasonal features and elements of the park management program which may be of interest to the general public.

Consideration should be given to standardising the presentation of a "Park Bulletin Board" which will be located in all visitor centres. The Bulletin board would promote all localised CALM collateral (ie Walk into a visitor's centre/CALM office and would be the first thing you look for to find out what's new, what's special and what's coming up).

Strategy: To encourage word of mouth promotion of the CALM estate.

Method: By promoting an exceptional experience.

Nothing sells like a good story! The belief that you did or saw something special rates highly in the tales of tourists returning from a holiday and interpretative emphasis should be placed on highlighting the uniqueness of such experiences when visiting a CALM property.

Method: By providing souvenirs and momentos which will "on-sell" the park experience.

It is likely that the proposed qualitative research will indicate a desire for visitors to be able to purchase souvenir products or momentos of their visit to the CALM estate. Such products are important tools to increase awareness of a particular tourism product and aiding word of mouth promotion of a holiday experience. (More detailed consideration of this subject is made on Page 66).

Method: By ensuring high levels of visitor satisfaction are maintained

Word of mouth is a valuable promotional tool and should be nurtured wherever possible.

According to the VISTAT study, CALM properties generally enjoy a high level of visitor satisfaction which should be maintained. As indicated in previous sections however research will be undertaken to clearly determine visitor expectations and whether they are being realised. Monitoring should be continued at a park level to ensure any shortfalls are addressed.

Strategy: To promote convenient access to CALM's tourism product.

Method: By promoting a fast and efficient means of gaining access to the CALM estate.

Having created the desire to visit the CALM estate, a fast, simple and efficient means of delivering access will need to be provided. Park Passes - a single pass for four weeks, a local pass or an all park pass for a year - would be a convenient option. The passes would address three distinct holiday types: Those booking a W.A holiday through travel agents (primarily inter-state and international visitors) who would purchase the park pass as part of their package, the intra-state traveller who is planning a drive holiday in W.A and is likely to access the pass through the recognised government travel centre, RAC or tourist bureau, and the W.A resident who is likely to visit several parks over a year and is prepared to buy the multiple entry pass.

While Travel agents, tourist bureaus and other recognised mechanisms of access are appropriate for International and Inter-state visitors, a cost benefit analysis should be conducted to determine the benefits of establishing a 008 telephone Park Pass purchasing line (Credit card) or providing a purchasing facility through CALM's Internet Site.

Consideration should be given to developing an International Park Pass which provides unlimited access to all national parks to international visitors. The Pass could be sold on a commission basis through major inbound and wholesale tourism operators.

All promotional collateral produced by CALM, the WATC and agencies accessing the CALM estate should promote the National Park Passes and the ways in which they can be conveniently purchased (More detailed reference P64-65)

5.5 Strategic Partnerships

CALM will seek to develop strategic partnerships with key promotional agencies at a national, state and regional level as well as with tour operators, major tour wholesalers and inbound tour operators.

OBJECTIVE

TO DEVELOP STRONG PARTNERSHIPS WITH THE TOURISM INDUSTRY

STRATEGIES

To develop co-operative promotional relationships with federal and state tourism authorities.

To develop co-operative promotional relationships with the State's 10 regional tourism authorities.

To develop co-operative promotional relationships with WA's tourist information bureaus.

To develop co-operative promotional relationships with tourism operators accessing the CALM estate

Strategies and Methodologies

Strategy: To develop co-operative marketing relationships with Federal and State agencies involved in tourism promotion.

Method: By working with key marketing agencies including the Australian Tourist Commission and the Western Australian Tourism Commission which are likely to strengthen CALM's Marketing Strategy.

Both of these agencies have had input into the marketing strategy and will be aware of the strategies and methods to be employed. Where possible, and appropriate, marketing resources should be shared and efforts complemented.

Attention will be focused on complementing and strengthening the existing marketing strategies for the ATC (Partnership Australia) and the WATC (Partnership to Success)

In line with promotional strategies identified in the **Nature Based Tourism Strategy** and the **Memorandum of Understanding between CALM and the WATC**, specific opportunities of mutual benefit will include:

- Working with the WATC to strengthen the presence and appeal of the State's natural assets in the Commission's promotional collateral. Editorial, high quality images and video footage will be made available for inclusion to the WATC's national and international promotional publications and sales tools.

- Providing "National Park Profiles" which can be included in any nature based marketing initiatives undertaken by the Commissions (Data base, Internet, brochures, media kits etc).

- Strengthening the WATC's participation in key national and international nature based promotions (Assistance with promotional collateral, display presentation, staffing of stand etc).

- Hot linking" CALM and the WATC's Internet sites for cross promotional purposes.

- Undertaking quarterly presentations to the WATC's Travel Centre staff to familiarise and update them on CALM's tourism products. Efforts will also be made to ensure Travel Centre Staff have first hand experience of CALM's tourism product.

- Providing park editorial and Park Fact Sheets for inclusion to the WATC's Media Kits.

-By assisting with the WATC's Media Familiarisation Program.

It should be noted that CALM's strategy is to strengthen the profile of WA's national parks in existing domestic and international tourism publications -- not create new ones.

Strategy: To develop co-operative marketing relationships with the state's 10 regional tourism authorities to strengthen the profile of CALM's estate.

Method: By familiarising, and where possible, involving regional tourism association's in CALM's plans to market its sites.

The regional tourism associations and CALM have a mutual objective -- to increase and extend visitations to the national parks in their regions.

CALM will work with regional tourism authority managers to identify mutually beneficial co-operative initiatives which can be included into their regional marketing plans. Initiatives may include development of site specific hand out information and niche market publications, joint media familiarisations, joint trade orientations etc.

A meeting will be sought between CALM and RTA managers early in the calendar year to compare marketing plans and ensure any new initiatives are well planned and adequately financed.

Strong emphasis will be placed on strengthening park profile's in the regional holiday planners.

Strategy: To develop a co-operative promotional relationship with WA Tourist Information Bureaus.

Method: By seeking to develop close working relationships with tourist information bureaus.

As tourist bureaus are one of the main sources of referral to CALM's estate, CALMs Tourism and Recreational Leaders will develop a direct line of communication with tourist bureaus in their regions. Energies will be focused on providing helpful, up-to-date tourist information and working with bureau managers to identify and promote new product opportunities.

It is anticipated the relationship will be developed in close consultation with Regional Tourism Associations, with initiatives identified forming part of CALM's Regional Marketing Plans.

Strategy: To develop a co-operative promotional relationship with tourism operators accessing CALM estates.

Methods: By familiarising, and where possible, involving tourism operators with CALM's plans to market the sites they access.

CALM will produce an executive summary of the Marketing Strategy which will be distributed to all park operators. A "user friendly" summary of operator opportunities and benefits will be inserted to the publication for easy reference. Operators will also be invited to participate in development of the regional marketing plans.

Methods: By packaging complimentary tourism product and developing co-operative promotional opportunities which can be promoted by the travel industry.

In each of its regional marketing plans, CALM will identify complementary tourism product which can be "packaged" with CALM product to strengthen the likelihood of visitation. CALM will work with tour operators to develop distinctive nature based packages which can be promoted by the travel industry to strengthen the profile of CALM's estate. For example a specially priced, off season, package might be developed combining train, coach, accommodation and a national park visit built around a particular experience. While CALM would work with operators to identify opportunities and provide access, it is anticipated the operators will market the package. Consideration should be given to "branding" the package with CALM's distinct promotional themeing to re-enforce CALM's presence and capitalise on the already established reputation of National Parks.

Methods: By providing access to CALM's image library for promotional purposes

Promotional collateral produced by operators to promote CALM's natural assets vary greatly in terms of their visual appeal and there would be considerable benefit in providing the opportunity for operators to access high quality images of the estate for promotional purposes.

It is anticipated the images would be accessed for the cost of duplication (standards, in terms of reproduction, would need to be strictly adhered to; usage restrictions - ie not for commercial purposes - would need to be set)

Methods: By assisting with media familiarisations which promote operators businesses.

Regional Marketing Plans will identify media familiarisation opportunities in consultation with the regional tourism authorities and tourism operators. Where practical, CALM will seek to strengthen the media familiarisations by providing expert interpretation, on site accommodation and information.

Methods: By assisting accommodation houses in providing promotional collateral
Current research indicates the majority of visitors to national parks choose to stay in satellite accommodation. That being the case, it is in the accommodation facility's interest for tourists to be given information which is likely to encourage them to stay longer. CALM will approach accommodation houses when producing their regional mags to see if they would be prepared to subsidise run-ons for circulation to their guests. Consideration should be given to approaching accommodation chains such as the Accor Group and having their corporate logo included on the front of the run ons.

OBJECTIVE

To ensure the strategy is consistent with CALM's Corporate objectives of protecting and conserving the State's natural assets.

STRATEGIES

All of the strategies proposed are in keeping with CALM's corporate objectives.

5.6 Key Outcomes:

KEY OUTCOMES

- The provision of a solid, research based promotional strategy.
- The development of a fully integrated promotional strategy involving all CALM regions and key tourism stakeholders.
- The creation of a strong and attractive W.A National Park Profile.
- A positive and increased media presence for CALM.
- Increased awareness of the range of CALM products and experiences.
- Improved tourist information dissemination.
- The development of strong strategic partnerships at both a state and regional levels.
- The attraction of co-operative dollars to promote the CALM estate.
- Increased awareness of CALM and the services it provides the community and the tourism industry.
- An increased level of support from the tourism industry.
- Increased visitations to CALM estates.
- Improved promotion of specific CALM sites.
- Improved presentation of CALM's tourist product.
- Improved access to CALM's tourism product.

PART TWO SECTION THREE

PRODUCT DEVELOPMENT STRATEGIES

- 5.1 Introduction
 - 5.2 Product Development Strategies
 - 5.3 Key Outcomes
-

5.1 Introduction:

An effective promotional strategy cannot be developed in isolation of the tourism product. The tourism product needs to satisfy visitor expectations, be able to accommodate increased demand, and develop according to the changing needs of its market.

Promotion and Product Development are both management tools and should be considered in context of the overall marketing program and its objectives.

The following section identifies key strategies and methods which will need to be implemented to ensure the established marketing objectives are realised.

5.2 Product Development Objective and Strategy summaries:

OBJECTIVE

**TO DEVELOP VIABLE AND ECOLOGICALLY SUSTAINABLE
TOURISM PRODUCT WITHIN THE CALM ESTATE**

STRATEGIES

To develop a Tourism Product Development Strategy which strengthens CALM's tourism product mix and stimulates growth of the tourism industry.

To Prioritise provision of basic tourism infra-structure in Established and Emerging Parks.

To integrate the development of tourism product into the Management Plans produced for the CALM estate.

To identify and facilitate the creation of tourism product which can be developed by private operators

To preserve the opportunity for a quality experience and ensure visitor impact on the natural environment is minimal.

To build strong working relationships with key agencies involved in tourism development at both a state and federal level.

Strategies and Methodologies:

Strategy: To develop a Tourism Product Development Strategy which strengthens CALM's tourism product mix and stimulates growth of the tourism industry

Method: By designing a Tourism Product Development Strategy which prioritises development of new product that is attractive to its target segments.

CALM will establish a Tourism Product Inventory which will be used as a reference for what new product could be developed to compliment and strengthen its existing product mix. The objective of the Tourism Development Strategy will be to identify and promote opportunities to develop new tourism product, ensure the product is complementary to what is currently available, generate nett revenue increases, and prioritise projects which are likely to strengthen the appeal of visiting the CALM estate.

While the strategy will be flexible in terms of adapting to changing trends, it would provide a clear tourism product development blueprint for tourism industry stakeholders and give direction to, and strengthen, future marketing initiatives.

Specific attention should be focused on developing tourism experiences and product which does not compete with existing product, will add to the natural appeal of the parks and provide an exceptional experience by worldwide standards.

Methods: By producing a Tourism Development Matrix which will prioritise development of tourism infra-structure in specific sites.

The Tourism Development Matrix will identify which properties will be able to sustain increased tourist numbers (and therefore can be promoted), which properties will require specific infra-structure development or assistance before further promotion should take place, and which properties have a high profile and could not sustain larger visitations (in which case high yield/low volume marketing strategies may have to be considered).

It is anticipated that each of the region's Marketing Plans will categorise their primary tourism assets as either Established, Emerging or Undeveloped Tourism Sites -- each of which will require different attention. In general terms, an Established Tourism Site can be defined as a high profile tourism asset which can sustain an increase in tourist visitation or usage. An Emerging Tourism Site is an asset which is potentially highly desirable and could soon be in a position to handle increased visitations, and an Undeveloped Tourism Site which is desirable but is either too sensitive to handle higher visitations or is not a priority in the overall context of CALM's marketing strategy.

Note: The criteria which qualify each of the sites for inclusion to the Marketing Matrix will need to be developed in consultation with CALM senior management. Criteria may include current visitor numbers, site infra-structure, visitor growth, number of licensed operators, staffing/visitor centre, development of marketing plan etc

Method: By developing a tourism development strategy which is complimentary to the plans of the Western Australian Tourism Commission and regional development Commissions.

The Western Australia Tourism Commission has identified zones of opportunity within the state and CALM will work closely with the Commission and other development agencies such as the Development Commissions and local government authorities to ensure efficiencies are maintained and clear lines of communications are established. Particular priority will be given to realising the objectives of the Nature Based tourism Strategy.

Strategy: To prioritise provision of basic tourism infra-structure in Established Parks and Emerging Parks.

Methods: By determining what is necessary in terms of basic tourism infra-structure required to satisfy visitor expectation (ie Information/signs/toilets etc) and delivering, or planning to deliver, those services.

Visitor satisfaction will be critical to the success of the marketing strategy. While natural appeal of the locations will be the primary drawcard, a lack of basic infra-structure could well detract from the experience of some visitors and impact negatively on existing and potential markets.

Obviously, due to lack of resources and the emphasis on protecting the parks, management initiatives will need to be prioritised, however, given the commitment to tourism, new weight will need to be given to providing a basic level of tourism infra-structure which will extend across the range of product being promoted.

The qualitative research to be undertaken by CALM will identify what is required to satisfy tourist's basic expectations. The outcome will form the basis of a Tourist Infra-structure Development Plan for the parks.

A park's ability to provide basic tourism infra-structure should be one of the primary prerequisites for increased promotional emphasis.

Where additional infra-structure is not available or unlikely to be available for some time, communication strategies will need to be adopted to modify tourist expectations.

Strategy: To ensure visitor satisfaction levels are maintained

Methods: By continuing to conduct visitor surveys which identify and address any park shortfalls in terms of visitor expectations.

The surveys, which should be conducted on a park by park basis, will be helpful in prioritising improvements or, where appropriate, modifying visitor expectation.

It should be noted that current visitor satisfaction levels to CALM's estate are high with more than 90% of visitors recorded in CALM's 1996 VISTAT Survey indicating a high satisfaction level.

Strategy: To include development of tourism product into each Regional Tourism Marketing Plan so it can be integrated into the overall management plans of the CALM estate.

Methods: By working with CALM Regional Managers and Recreation and Tourism Program leaders to develop regional tourism marketing plans which include a section of Product Development which can be integrated to CALM's overall Management Strategy.

The underlying philosophy of this strategy is to prioritise identification of tourism development initiatives in each region so they can be considered as part of the overall tourism product development strategy.

As tourism is likely to have a substantial impact on CALM estate, it is anticipated future Park Management Plans produced by CALM will include specific reference to tourism product development and the marketing of CALM's tourism product.

Methods: To establish a network of CALM personnel who will have included in their job description a dedicated tourism marketing component. The component of the Recreation and Tourism Program Leader's job description will be standardised to reflect the duties and responsibilities required to implement the regional marketing plan.

Once a year the designated personnel will be brought together for a CALM Regional Marketing Workshop to share information, acquire new training and evaluate and improve on their plans.

Strategy: To identify and facilitate the creation of tourism product which can be developed by private operators.

Method: By working with tourism operators to develop new tourism product.

Tourism operators are keen to develop "new product" which is likely to be commercially viable. The new product might include packaging specialist tours such as nocturnal animal watching, stargazing, animal tagging, expert interpretations etc. CALM should be receptive to such ventures as it is likely to increase visitor yield (and CALM revenue) without necessarily increasing visitor numbers.

Each region will identify at least one new tourism product opportunity in their marketing plans which would be developed by the Recreational and Tourism Program Leader in close consultation with central office. The initiatives would form part of the CALM Tourism Product Development Strategy. As new product development initiatives are likely to be resource hungry, priority will need to be given to projects which diversify CALM's product base and don't duplicate other operations.

Strategy: To facilitate the development of two major world class nature based tourism projects in the CALM estate.

Method: By identifying two major world class nature based tourism projects which could be built on CALM estate, and working with key government and non government agencies to create incentives which will attract investors to develop the project.

As well as responding to requests by industry to develop small scale tourism product, CALM will identify two major tourism projects which would significantly increase the profile of the state's nature based tourism product. It will then actively work with key authorities to develop a range of incentives for potential developers or target major institutions to get the project off the ground. The premise is simple: If a major investor with \$5 to \$10 million is looking at Western Australia for a commercial tourism opportunity, he should be made aware that government and non government agencies are pro-active and are prepared to fast track two major projects which preliminary studies have proved would be viable.

Methods: By developing expertise which is capable of recognising, and facilitating the development of world class tourism opportunities within the parks.

Development of exceptional world class tourism product is important to the growth of the tourism industry and the realisation of CALM's tourism marketing objectives. CALM needs to be able to speak, and advise, with some authority regarding the development of high quality tourism opportunities within its estate if it is initiate new, ecologically sustainable tourism product in its national parks. That authority needs to be drawn from an up-to-date understanding of what is being successfully done in other parts of the world, a consciousness of the environmental and political parameters within which such developments would work in W.A, and an intimate knowledge of the tourism industry. That resource would seek to identify new tourism product opportunities within the CALM estate and link them with existing or potential operators/investors.

As recognised earlier, emphasis should be placed on developing unique world class product which is complimentary to its distinct environment.

Strategy: To strengthen the opportunity for visitors to have a quality experience by working with tourism operators to provide high standards of interpretation and service.

Method: By providing interpretative training assistance to tour operators.

Standards of interpretation by tour operators vary throughout the state and CALM will plan to improve them where necessary to acceptable standards.

CALM has produced an excellent interpretation manual which could be used as a reference for operators. Consideration should be given to producing a 30 minute training video which could be lent out to operators and studied as part of their licensing process.

A training opportunities may also be available at the proposed Annual Tourism Workshop held by CALM and involving the regional tourism industry.

Methods: By providing access to expert interpretation to CALM managed assets. As part of the regional marketing plan launch or review, CALM rangers will stage an operators workshop to present any new interpretative information on their respective parks.

Strategy: To preserve the opportunity for a quality experience by effectively managing tourist visitations

Methods: By determining capacity visitor levels on each site and developing plans and mechanisms based on visitor number forecasts which will limit visitations to an acceptable level.

CALM's natural assets are finite resources in terms of their ability to sustain tourist levels without damaging the environment or negatively effecting the visitor's experience. The limit of each property varies according to a range of factors including environmental sensitivity and visitor activity etc.

It is inevitable that in time demand will exceed supply. If CALM is to effectively preserve and promote its natural assets, it must determine at what level visitor impacts become damaging. Once that is identified, a range of mechanisms such as charge increases, traffic flow management strategies and exclusive tour operator access can be considered.

As park access and the degree of quality tourist experience will have a major impact on the marketing strategy, provision of a forecasting model is seen as a priority.

Strategy: To build strong working relationships with key agencies and authorities involved in tourism development at both a state and regional levels

Method: By involving key stakeholders in the design and interpretation of CALM's Tourism Product Development Strategy.

CALM will seek to work closely with key agencies including the WATC, the development commissions, main roads, regional tourism authorities and local government authorities to develop integrated regional marketing strategies which identify tourism product priorities.

5.3 Key Outcomes:

KEY OUTCOMES

- The design of a statewide Tourism Product Development Strategy for the CALM estate.
- The prioritisation of tourism product development opportunities on the CALM estate.
- The creation of a tourism product development strategy which complements the activities of the Western Australian Tourism Commission and regional development strategies.
- The identification and prioritisation of two world class eco-tourism projects.
- The development of a plan that provides for a base level of tourism infra-structure throughout the CALM estate.
- The development of a site access model which limits tourist visitation to ecologically sustainable levels.
- The creation of an internal mechanism able to implement the Tourism Product Development Strategy.
- The development of a monitoring mechanism to ensure high levels of visitor satisfaction are maintained.

PART SEVEN COMMUNICATION STRATEGY

- 8.1 Introduction
 - 8.2 Internal Communications strategy
 - 8.3 External Communications strategy
 - 8.4 Strategy Outcomes
-

8.1 Introduction:

To ensure the successful implementation of the marketing strategy, a range of internal and external communication initiatives will need to be undertaken. As indicated in the SWOT analysis there is confusion and likely to be some resistance - particularly from competing quarters of the private sector and within the organisation itself - to CALM playing an active role in tourism.

This confusion and resistance will need to be addressed through a dedicated communications strategy. While the scope of this consultancy does not extend into this arena, a possible framework is provided:

It should be noted that any communications strategy designed to strengthen the involvement of CALM in the tourism industry should be developed in close consultation with CALM's Corporate Relations Division and fall within existing policy guidelines

8.2 Internal Communications Strategy

Strategy: To promote CALM's position to its internal audiences with regard to its involvement in the tourism industry.

Method: By identifying and influencing key internal audiences likely to impact on, or be impacted by, CALM's tourism marketing strategy

Primary Audiences

CALM's **primary internal audience** is defined as all CALM staff, particularly those likely to be directly involved with the tourism sector and those in a position to influence public perception.

Method: By clearly communicating the benefits of the strategy to internal audiences.

Suggested communication initiatives for internal audience.

- By providing a clear and consistent message about CALM's involvement in tourism and the benefits provided to CALM, the community and the industry. Suggested message components, for example, could be:

“ That CALM now has a tourism marketing strategy which has been developed, and will be implemented, in close consultation with the Western Australian Tourism Commission and the tourism industry”.

“ That the objectives of the strategy are to increase awareness of CALM's natural assets, enhance visitor experience and generate revenue which can be channelled into improving facilities and preserving the park's natural assets.”

“ That CALM is supportive of managed tourism growth that minimises negative impacts on the environment”.

“ That CALM is in the business of marketing its tourism assets as a means of achieving its goal to maintain, protect and preserve its estate while offering an enhanced visitor experience”.

Note: Whatever messages are adopted, it will be important to ensure they are consistent and widely promoted throughout CALM.

Other suggested internal communications initiatives might include:

- Face to face briefing sessions.
- Production and distribution of “user friendly” question and answer sheet regarding CALM's involvement in tourism and the benefits likely to be derived. To be circulated to all staff. Consideration should also be given to developing a chart similar to Tourism Council Australia's “The Benefits of Tourism” which demonstrates the benefits which are passed to the CALM estate from tourism.
- Inclusion or reference of message to keynote speeches by senior management.
- Inclusion or reference of message in appropriate internal publications produced by CALM.
- Staging of a training workshop or series of presentations involving all staff likely to be directly involved with the tourism sector (Regional Managers and R&T Program Leaders). This will also be a good opportunity to prepare regional staff for their own regional presentations (Refer next section, External Audiences).
- By training Tourism and Recreation Program leaders to be “tourism ambassadors.” CALM's network of T&R Program leaders will be trained to become conversant with the reasons for CALM's involvement in tourism and part of their responsibility will be to ensure key messages are communicated throughout their regions.
- Bi-annual planning meetings between senior management of the Tourism and Recreation Program and the Corporate Relations Division.

8.3 External Communications Strategy

Strategy: To create a positive profile for CALM and its involvement in the tourism industry.

Method: By clearly communicating the extent of CALM's contribution to tourism.

There is a general lack of awareness about the extent of CALM's contribution to the tourism industry -- the infra-structure and services it provides, the financial commitment involved in developing its assets, the opportunities which are created for tourism operators and the economic benefits which are passed on to various communities by the Department. CALM will quantify its contribution to the tourism industry and provide a clear message about the extent of its commitment to tourism. It will, for example, undertake a simple economic impact study to determine the economic benefit to local communities which has resulted from the creation of the Treetop Walk, it will quantify new opportunities which have been created for tourism operators on its estate (20% increase in tourism operator licences a year), it will calculate the amount which has been invested in the development of tourism infra-structure during the past 12 months (millions?).

Once several key messages and case studies have been developed, they will be clearly and consistently communicated to industry, government and the general community to win support for CALM and its initiatives.

Method: By clearly communicating the benefits of the strategy to primary external audiences.

CALM's primary external audiences are defined as:

- The general public
- Politicians.
- Government agencies involved with the tourism sector including the WATC, State Development Commissions and Local Government Authorities.
- Private sector groups involved with tourism including Tourism Council Australia, Regional Tourism Authorities, Tourist Bureaus.
- Tourism operators

Suggested Communication initiatives:

- By providing a clear and consistent message about CALM's involvement in tourism and the benefits provided to the community and the industry.

Suggested message components, for example, could be:

" That CALM is committed to the development of a Nature Based` Tourism Strategy."

" That CALM and the WATC are working in partnership to increase the economic benefits of tourism to the state while protecting its natural assets"

" That CALM is responding to calls from the tourism industry to work in partnership with it at a state and regional level to promote and develop the state's natural assets"

“ That CALM is in the business of marketing and building its tourism assets as a means of achieving its goal to maintain, protect and preserve its estate while offering an enhanced visitor experience”.

“ That CALM is supportive of managed tourism growth that minimises negative impacts on the environment”.

Attention should also be focused on anticipating and addressing any opposition likely to develop from the marketing strategy, particularly the advertising campaign. Again, this should be done in close consultation with the Corporate Communications Program.

Consideration should be given to involving an outside consultant in an initial brainstorming session to provide an objective assessment of CALM's position and strengthen initiatives which will neutralise any opposition.

To impact on its key audiences, for example, the following initiatives could be undertaken:

General Public:

- By launching CALM's Tourism Marketing Strategy through the media and emphasising the new benefits for the public (ie concentrating on improved facilities and interpretation, enhanced experience, more information, providing assistance to tourism industry operators etc) which will be created through the partnerships with the WATC and industry (Let TCA and WATC expound its virtues). Unveil the pilot co-operative advertising campaign at the same time saying “CALM is proud of our parks and this is how we are working with small operators in the tourism industry to spread the word about what the state has to offer” and “There are things to see that the people of W.A don't know about and we want them to experience it first hand (The fact that the campaign will kick off in the West Australian and will be heavily supported by industry and the WATC should have some influence on the coverage). Also emphasise the principle that any revenue generated by visitors will be regionalised and put directly into local park projects.

Politicians:

- By ensuring key politicians are fully briefed on CALM's direction and the benefits to the community, the natural estate and industry which are likely to be derived.

Government Agencies involved with the tourism sector

- By producing an executive summary of the marketing strategy which will be circulated to appropriate government agencies. A covering letter from the Recreation and Tourism Program leader or respective CALM Regional Managers will draw their attention to the section relative to their business (of course agencies who have been involved in the strategy's design and are likely to be directly involved in the implementation of the strategy will receive a detailed document as well).

- By staging bi- annual planning meetings between senior management of CALM and the Western Australian Tourism Commission (Development and Marketing)

- At a regional level, presentations will be given to WATC management, key local government authorities and development commission boards with the understanding that input to CALM's Regional Tourism Marketing Plans is being sought to ensure consistency with regional tourism planning and marketing initiatives.

Private Sector Groups involved in tourism

- Executive summaries will be distributed to all regional tourism authority CEO's and their board members as well as each of the tourist bureau managers. Where appropriate presentations will be given, again, making clear that input to CALM's regional Tourism Marketing Plan is being sought to ensure consistency with regional tourism planning and marketing strategies.

Tourism Operators

- Executive Summaries will be distributed to all tourism operators on CALM's Data Base and summaries will be provided to all new licensed operators. A special insert will be produced spelling out the benefits and opportunities which have been created specifically for tourism operators.

- Where necessary, presentations to operators will be staged involving senior CALM management. Examples of other site specific co-operative marketing opportunities will be used to demonstrate the benefits of CALM's new position.

CALM's message should also be re-enforced in its newsletter Touring Western Australia

8.3 Communication Strategy Outcomes

OUTCOMES

The key outcomes of the communication strategy will be:

- Improved communication within CALM.
- Greater likelihood of support for the strategy by target audiences.
- A more positive public perception of CALM.
- A sense of professionalism and leadership demonstrated by CALM to the tourism industry.
- An end to the uncertainty on where CALM stands in regard to tourism.
- A clear understanding by key stakeholders of CALM's objectives and the strategies it is likely to apply.
- A solid foundation on which regions and tourism operators can begin to build their marketing relationship with CALM

PART SEVEN KEY RECOMMENDATIONS

7.1 Introduction

The following section is a summary of the Tourism Marketing Strategy's key recommendations.

STRATEGIC POSITION

* That CALM states clearly its commitment to:

- The development of a Nature Based Tourism Strategy.
- The development of partnerships with the tourism industry which will strengthen the profile of its parks and improve the quality of experience of its visitors.
- The business of tourism in terms of generating revenue which can be channelled back into protecting and managing its estate.

* That CALM creates a distinctive promotional identity for its estate which the travel and tourism industries will actively promote in the marketplace.

* That CALM shows leadership by seeding co-operative, nature based marketing initiatives and setting the direction for promotion, allowing industry to strengthen it and carry it into the marketplace.

* That CALM actively "facilitates" development of tourism product in its estate.

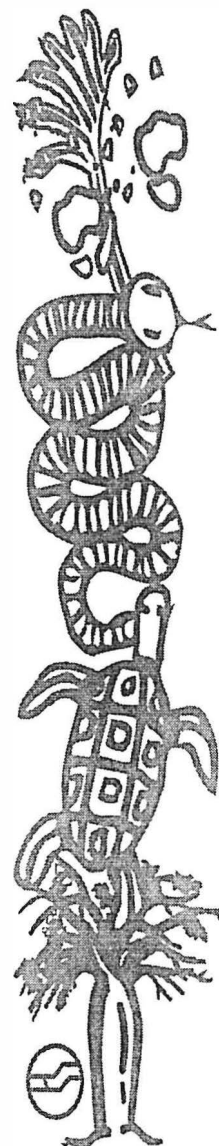
* That CALM nurtures a "marketing ethos" within the Department

RESEARCH AND PLANNING

* That CALM undertakes qualitative research to clearly identify what motivates existing and potential markets to visit its estate.

* That CALM undertakes research on an on-going basis to monitor the impact of its marketing strategy

* That CALM develops Tourism Marketing Plans for each of its regions/sites which can be integrated into the Tourism and Recreation Programme's Tourism Marketing Strategy.



PROMOTION

- * That CALM develops a strong and attractive visual identity for its tourism assets.
- * That CALM produces a range of promotional collateral to establish the profile of its natural assets in the national and international marketplace.
- * That CALM initiates a media campaign to increase awareness of the value and diversity of its estate and encourages visitation to its sites.
- * That CALM undertakes a range of initiatives which will provide more convenient access to its parks.
- * That CALM primarily focuses on promotion within the state, while strengthening the national and international promotional efforts of the Western Australian Tourism Commission, regional tourism authorities and individual operators.



PARTNERSHIPS

- * That CALM seeks to establish co-operative partnerships with key tourism stakeholders including the Western Australian Tourism Commission and the tourism industry.

PRODUCT DEVELOPMENT

- * That CALM seeks to produce an integrated Tourism Product Development Strategy for its estate.
- * That CALM prioritises the provision of a base level of tourism infra-structure to its Established and Evolving sites.
- * That CALM facilitates the development of two world class eco-tourism projects within the lifetime of the strategy.
- * That CALM facilitates the development of tourism product which is complementary to existing tourism product and provides specific encouragement to the provision of world class experiences within its parks.
- * That CALM modifies the Duty Statements of its Tourism and Recreation Leaders in each region to accommodate a new emphasis on tourism marketing and tourism product development .
- * That CALM direct energies towards expanding the range of quality experiences provided by its estate.
- * That CALM seeks to improve the standard of service offered by tourism operators accessing its estate.
- * That CALM develop initiatives to monitor and, where appropriate, limit tourism visitations to its sites to ensure negative impact on the environment is minimal.

COMMUNICATIONS

* That CALM initiates an internal communications strategy aimed at generating understanding and gaining the support of its staff for the Department's involvement in tourism.

* That CALM initiates a communications strategy aimed at "selling" the benefits of the marketing strategy to the tourism industry and the community.



- Ends -

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