



WHYALLA NORTHERN  
COASTLINE MASTER PLAN  
**DRAFT REPORT**

JULY 2016





# CONTENTS

## Part A: Background Investigations

### 1. Introduction 2

- 1.1 Context 2
- 1.2 Purpose 2
- 1.3 Study Area 3

### 2. The Study Area 4

- 2.1 Locality 4
- 2.2 Key Land Uses & Tenure 5
- 2.3 The Natural Environment 7
- 2.4 Recreation & Tourism Activities 11
- 2.5 Access 12
- 2.6 Zoning 13
- 2.7 Indigenous Land & Heritage 16

### 3. Strategic Context 17

- 3.1 South Australian Planning Strategy - Eyre and Western Region, 2012 17
- 3.2 SA Tourism Plan 2020 17
- 3.3 SA Nature Based Tourism Action Plan 18

- 3.4 RDA Regional Plan 2014-16 and Annual Report 2013-14 and 2014-15 18

- 3.5 Spencer Eyre Peninsula NRM Sub-Regional Plan - draft 18

- 3.6 Regional Climate Change Adaptation Plan for the Eyre Peninsula 19

- 3.7 Eyre Peninsula Coastal Action Plan and Conservation Priority Study 20

- 3.8 Eyre Peninsula Coastal Access and Off-Road Vehicle Strategy 20

- 3.9 Upper Spencer Gulf Marine Park Management Plan Summary 21

- 3.10 Eyre Peninsula Destination Action Plan (DAP) 2012-2015 21

- 3.11 Whyalla City Council Strategic Plan 2015-16 to 2019-20 22

- 3.12 City of Whyalla Tourism Strategic Plan 2015-18 22

### 4. Socio-Economic Context 23

- 4.1 Demographic Context 23

- 4.2 Manufacturing & Mining Industries 24

- 4.3 Fishing & Aquaculture Industry 25

- 4.4 Tourism Sector 26

### 5. Tourism Market Analysis 29

- 5.1 Broad Market Trends 29

- 5.2 Visitation on the Eyre Peninsula 31

- 5.3 Visitation in Whyalla 33

### 6. Consultation 37

- 6.1 Previous Consultation undertaken and results 37

- 6.2 Master Plan Consultation Process and Results 37

- 6.3 Key Findings - Residents 37

- 6.4 Key Findings - Visitors - Preliminary Survey 39

- 6.5 Key Findings - Visitors - Online Survey 39

### 7. Audit of Existing Facilities 42

- 7.1 Key Infrastructure 42

### 8. Swot Analysis 44

- 8.1 Strengths 44

- 8.2 Weaknesses 45

- 8.3 Opportunities 46

- 8.4 Threats 47

## Part B: Master Plan

### 9. Master Plan 50

- 9.1 Structure & Purpose 50

- 9.2 Master Plan Opportunities 50

- 9.3 Vision 51

- 9.4 Objectives 51

- 9.5 Precincts 53

- 9.6 Overall Master Plan 63

### 10. Conclusions & Implementation 70

#### APPENDIX 1: AUDIT

#### APPENDIX 2: MASTER PLAN

#### APPENDIX 3: IMPLEMENTATION PLAN

# PART A: BACKGROUND INVESTIGATIONS



# 1. INTRODUCTION

## 1.1 Context

Whyalla is located 396km north-west of South Australia's capital, Adelaide. The city is the largest in the Upper Spencer Gulf region, and is located on the western shores of Spencer Gulf. Founded in 1901 as the town of Hummock Hill and renamed Whyalla in 1914, it was established as a port to ship iron ore extracted from the nearby Middleback Ranges.

Whyalla is the major population, industry and service centre of the Upper Spencer Gulf with an Estimated Resident Population of 22,759 persons in 2015<sup>1</sup>.

It contains a large number of educational, retail and commercial facilities and services, including a regional campus of the University of South Australia.

Whyalla became a key South Australian centre of steelmaking at the start of the 20th century, with the start of ship construction and the Whyalla Steelworks in the early 1940s. Following the closure of the shipyards in the late 70s, the viability of the steelworks has experienced increasing pressure and uncertainty.

It has become apparent over the last few years that diversification is required to sustain the local economy.

The City of Whyalla has identified the Northern Coastline of Whyalla as being an area with potential for further economic recreational and tourism development. Accordingly, a project brief to prepare a Master Plan was formulated by Council in conjunction with the Regional Development Australia Whyalla and Eyre Peninsula (RDAWEP).

## 1.2 Purpose

The Master Plan for the Development of Whyalla's Northern Coastline seeks to undertake research, identify and assess options and incorporate into a plan of action that will maximise Whyalla's Northern Coastline recreational and tourism potential.

The project output will be a comprehensive Master Plan for the future development of the coastline which will form the base for longer term development of the area. The long term aim is to identify and develop high quality recreational and tourism infrastructure and activities that will increase utilisation of the precinct by residents of Whyalla and visitors to the region.

As identified in the project's brief, the Master Plan will:

- Investigate current land tenure and planning policy;
- Investigate and quantify expected increased demand, current capacity and costs of infrastructure;
- Include evidence based market research;
- Identify the existing aquaculture zones within Fitzgerald Bay and investigate the potential for these areas to become productive once again;
- Investigate the provision of services and infrastructure for current residents;
- Identify specific precincts which might support more intensive development;
- Ensure that the area's fragile ecosystems are protected;
- Include cost estimates; and
- Be able to be regularly updated.



<sup>1</sup> ABS, Regional Population Growth, Local Government Areas



Figure 1: Study Area

The project also needs to ensure future tourism and recreational activities are able to co-exist with existing industry. In other words, tourism and recreational development will not be facilitated at the expense of industry. The Master Plan will form part of a long term strategy (10-15 years) where actions can be implemented over time in order to achieve the Master Plan vision.

### 1.3 Study Area

The Study Area is shown in Figure 1.1 and extends from False Bay to Stony Point, and from Point Lowly to Douglas Point.

The Study Area is located some 20 kilometres from Whyalla, and extends over a stretch of some 35 kilometres along the northern coastline.



## 2. THE STUDY AREA

### 2.1 Locality

The broad locality comprises a mix of land uses, which is generally identified on the Land Use Plan which forms Figure 2.1. The key distribution of land uses can be described as follows:

- Large tracts of essentially undeveloped Conservation Zone land bordering the coastline;
- Industry Zone land (Deferred Industry and Special Industry (Hydro) Zones), which includes:
  - » The Santos Processing Plant to the west of Point Lowly in Port Bonython. The land is leased to Santos by the SA Government. A 2.5 kilometre long jetty extends over the water, which is also owned by the SA Government and leased to Santos;
  - » Mitsubishi Corporation's diesel import facility, consisting of three fuel storage tanks, a pipe-rack above the jetty and pipelines;

- Unzoned land owned and used by the Department of Defence, known as the Cultana Jenkins Training Area, as shown by Figure 2.2.

It is noted that a desalination plant and associated pump station, proposed by BHP, was approved in 2011 in Point Lowly, just north of the Santos plant. Construction of the desalination plant is yet to commence. BHP has indicated that the facility may be constructed in the coming years.



Source: Spencer Gulf Port Link



Source: Department of Defence

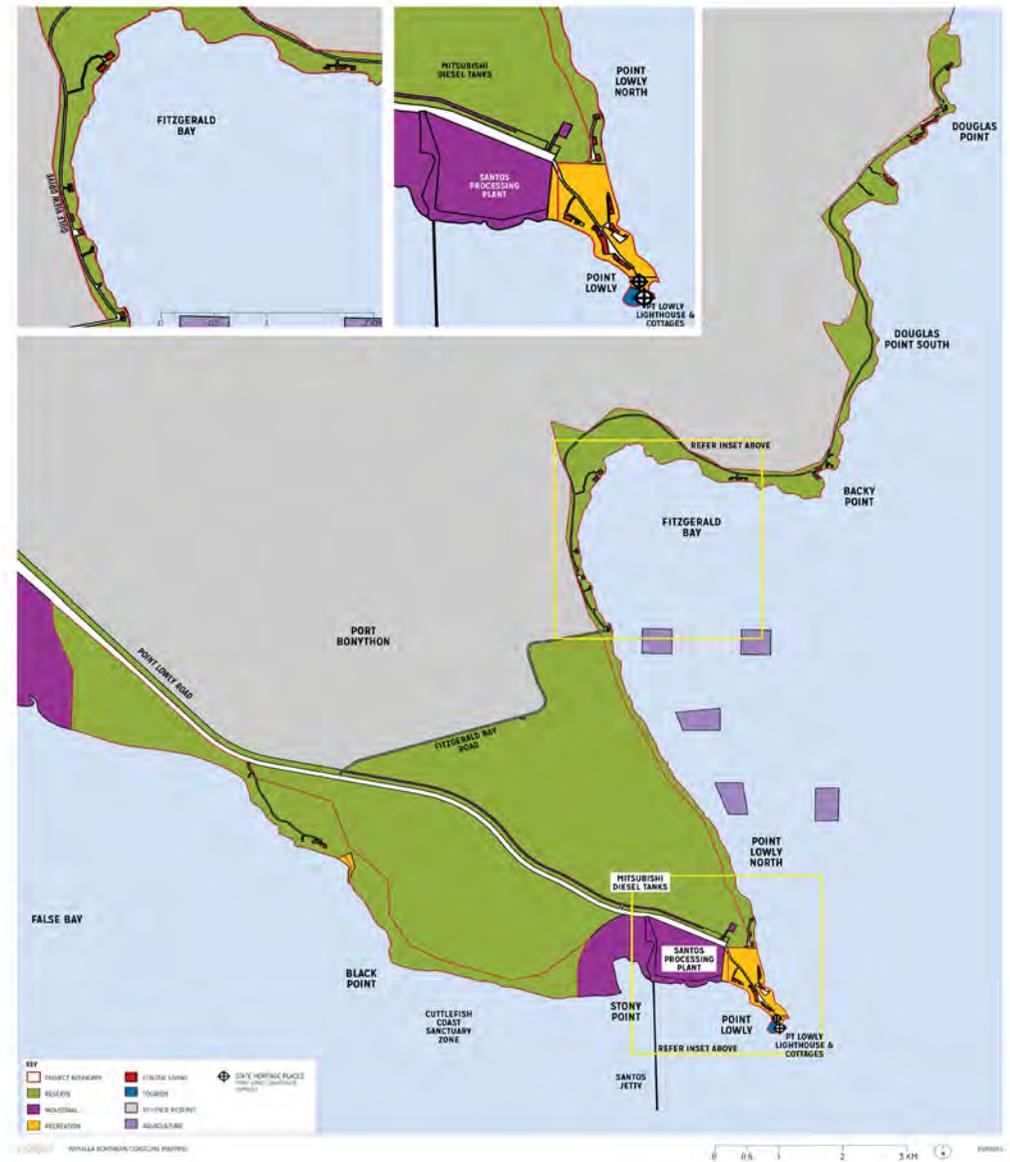


Figure 2.1: Land Use Within Locality



## 2.2 Key Land Uses & Tenure

The majority of the Study Area is undeveloped and comprises large tracts of leasehold Crown land, as identified by Figure 2.2.

Figure 2.3 identifies in greater detail the landowners in the Study Area. These include:

- Commonwealth Government (Defence);
- State Government (Department of Planning, Transport and Infrastructure and Department of Environment, Water and Natural Resources), including land under the care and control of the City of Whyalla;
- City of Whyalla;
- Private owners (residential and industrial owners).

Figure 2.12 in Section 2.7 identifies traditional ownership of the land.

It is important to recognise the following key uses/activities:

- The Point Lowly Lighthouse, which is in operation and also registered as a South Australian Heritage Place since 1994<sup>2</sup>;

- Shacks in the Point Lowly area and along the coast from Fitzgerald Bay to Point Douglas. These have been established on freehold Crown land and serve as holiday homes or permanent residences. Some of these are also rented to holiday-makers and are advertised as such. It is noted that 15 such dwellings have been established with Council approval in the past ten years. Dwellings are connected to electricity and various arrangements exist for water connections. It was suggested during consultation that no change should be made to this situation, to prevent additional costs. All dwellings use on-site waste treatment; and
- A range of tourism and recreation facilities, further described in Section 2.5.



<sup>2</sup> Point Lowly Lighthouse Complex (including Lighthouse, Reserve Land of 2.14 Hectares, Power House, Two Keepers' Cottages, Oil Store, and Signal Flag Mast)

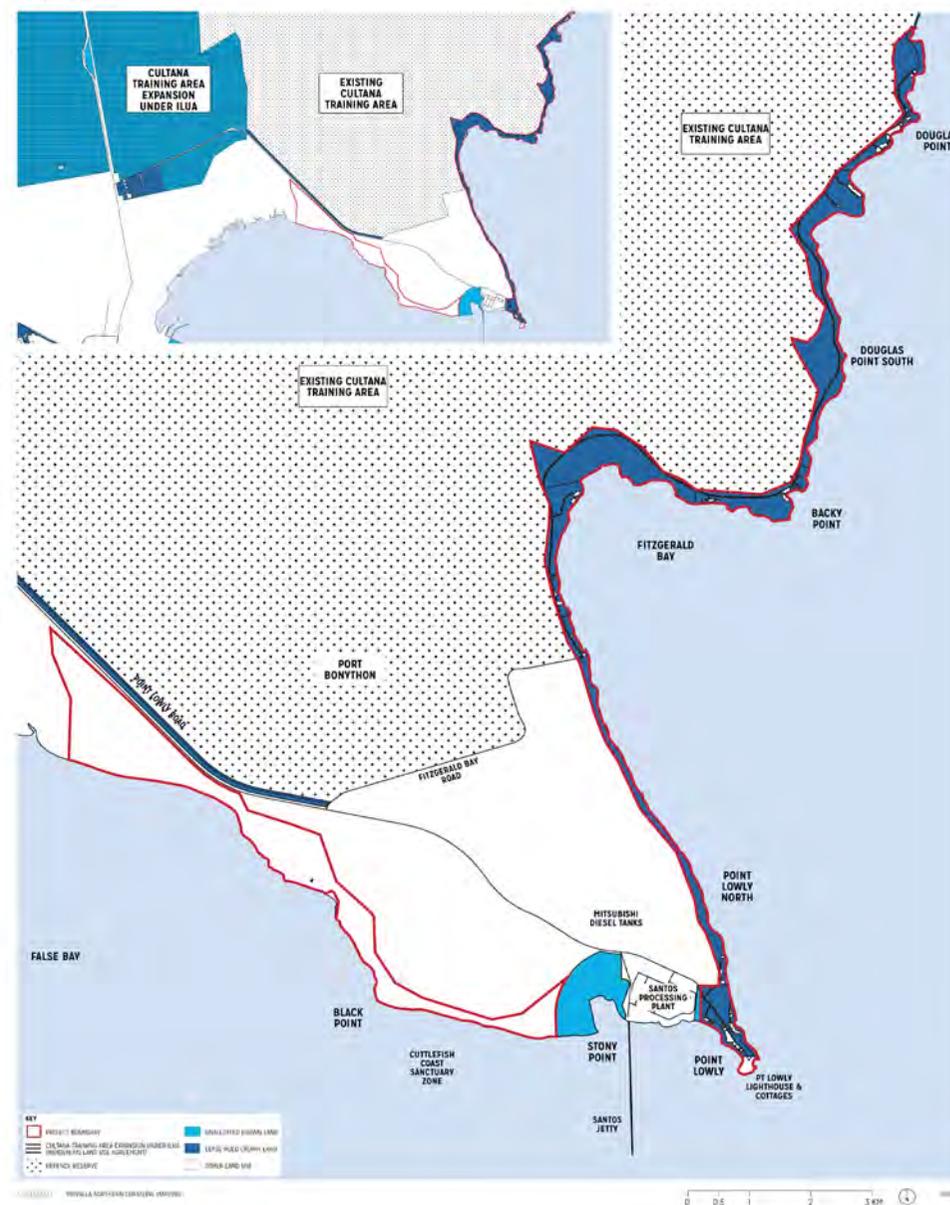


Figure 2.2: General Land Tenure

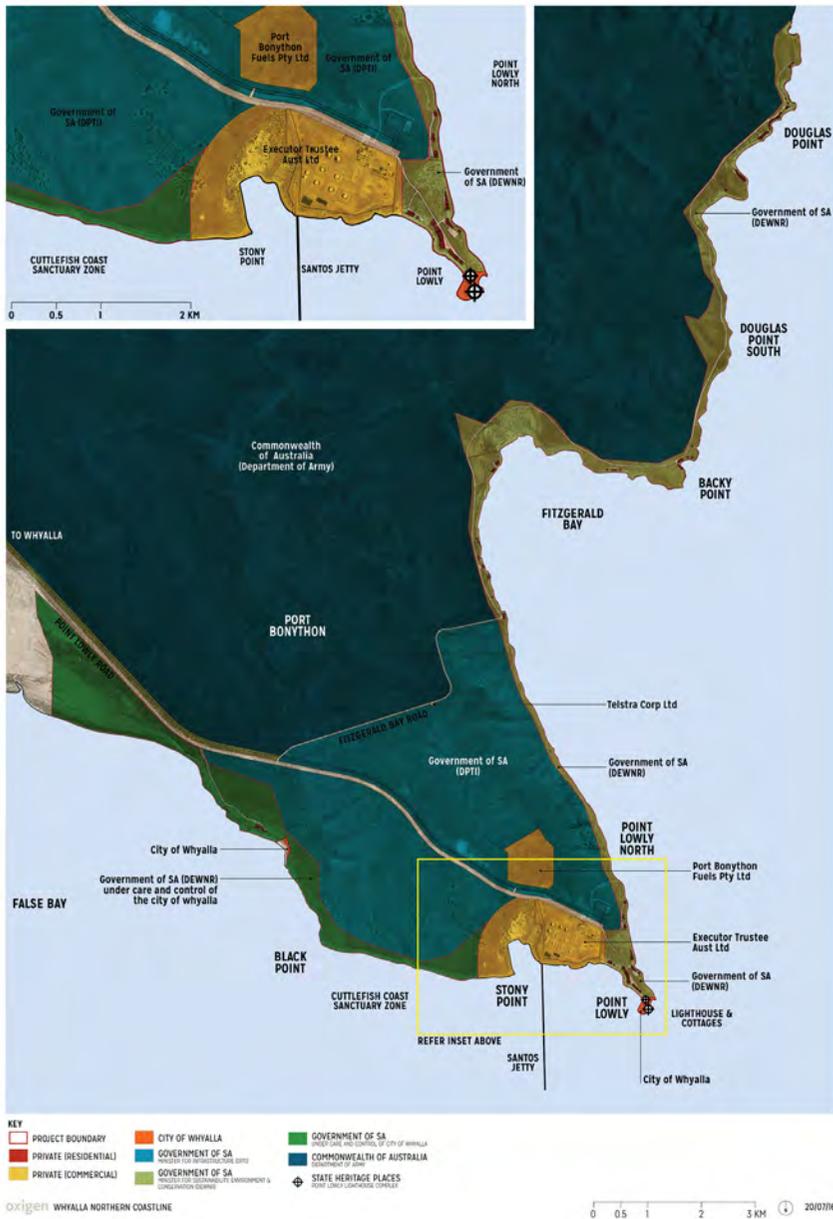


Figure 2.3: Detailed Land Ownership





## 2.3 The Natural Environment

### 2.3.1 The Land

The Study Area is mostly undeveloped natural coastline environment characterised by:

- Uneven terrain, sand dunes and cliff tops. Those dunes located at Fitzgerald Bay and near Point Lowly are the most northerly on the western side of the Spencer Gulf and contain rare fauna specimens<sup>3</sup>;
- Low to medium height cliffs along the southern shoreline;
- Sandy beaches exist along the southern coast (Black Point, western edge of the Lowly Peninsula) and at Fitzgerald Bay. They are about 3 to 5 metres above sea level;
- Mangroves;
- Rocky beaches are found to the east and west of the Santos Plant;
- Mallee/saltbush is only found around Black Point and the southern portion of the Study Area. The rest of the Area is mostly composed of low to medium height bushes; and

- The entire coastline is identified as wetlands of national importance which are home to fauna and flora of conservation significance.

As the Study Area comprises coastal land, risks of flooding and erosion exist as shown on Figure 2.4. It is noted that, as in most low-lying coastal regions, the majority of the Study Area is prone to coastal acid sulphate soils, including the whole of the Point Lowly Peninsula. These are formed during and following tidal movements. When disturbed (leading to air exposure), this may lead to additional soil oxidation and cause/worsen erosion, leading to habitat degradation and loss of biodiversity, such as mangrove dieback. Disturbance may be the consequence of infrastructure work, industry work, tourism activities, boating/marinas, or in some cases aquaculture<sup>4</sup>.

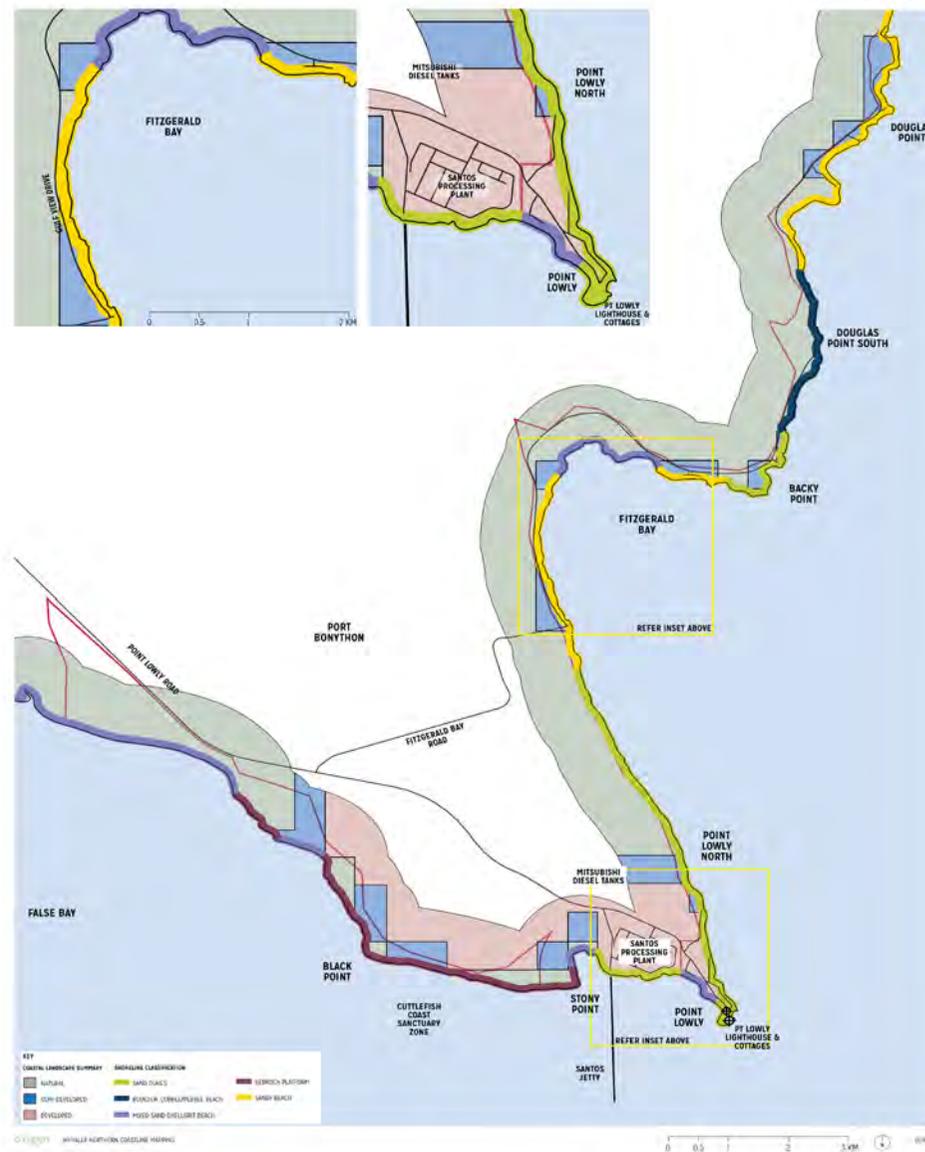
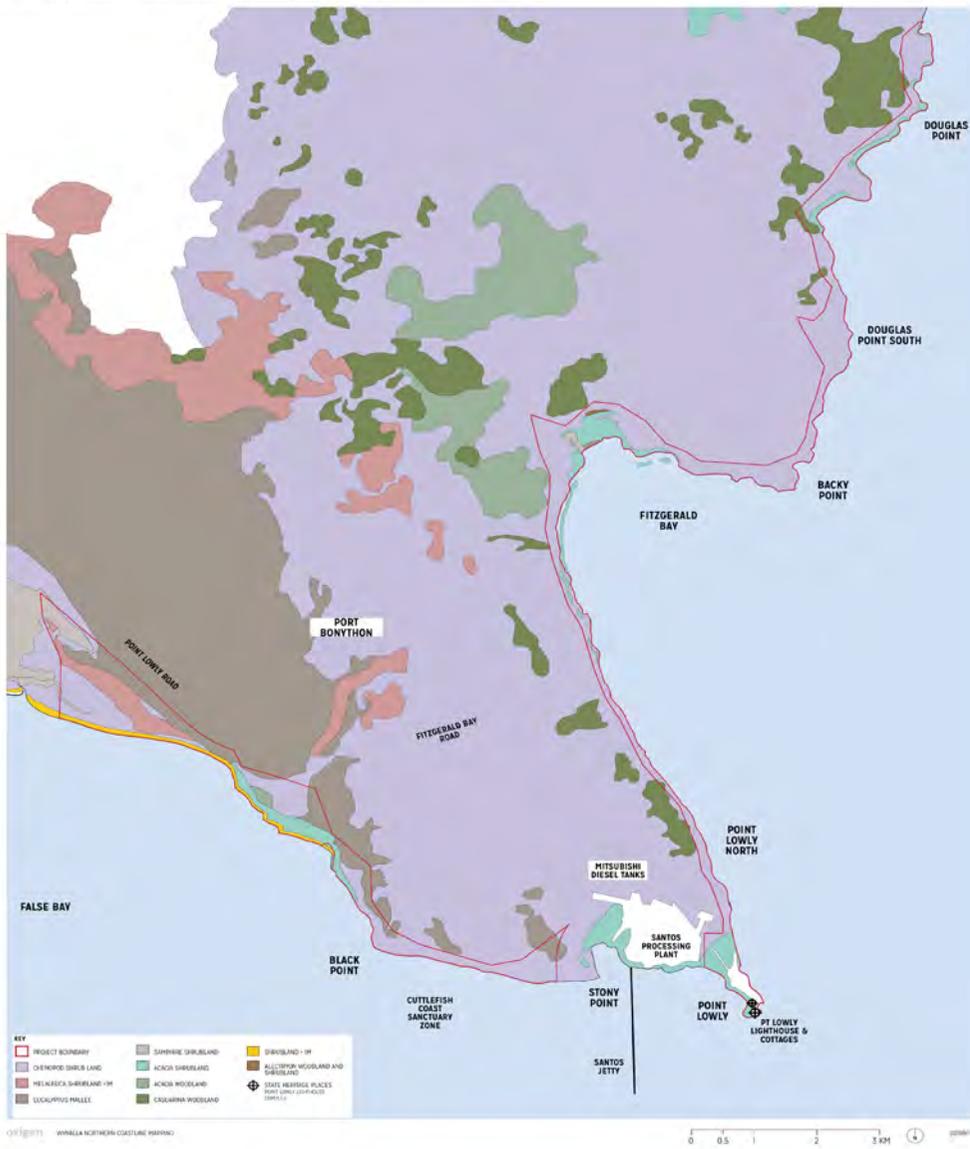


Figure 2.4: Coastal Condition

<sup>3</sup> Eyre Peninsula Coastal Action Plan and Conservation Priority Study

<sup>4</sup> South Australian Coast Protection Board, A Strategy for Implementing CPB Policies on Coastal Acid sulfate Soils in South Australia, 2003



As shown by Figure 2.5, the majority of the Study Area is not subject to native vegetation constraints.

It has been identified by consulted stakeholders that some of the vegetation was being used for firewood by visitors.

In terms of geological heritage, the stranded shingle beach ridges are a natural geological phenomenon which runs along portion of the coast and is found in the Study Area at Fitzgerald Bay. The general extent of this area is identified on Figure 2.6. This occurrence is the only one in South Australia and is generally uncommon in Australia.

An application to register the ridges on the SA Heritage database was submitted in 2014. As advised by the State Heritage Unit of the Department of Environment, Water and Natural Resources, this application is awaiting consideration by the SA Heritage Council.



It was indicated that the item will be recommended for listing, noting that additional field work was undertaken at the time this report was prepared, to ascertain the exact spatial extent of the listing.

Figure 2.5: Native Vegetation



Off shore, adjacent to the eastern portion of the Study Area (i.e. between Point Lowly and Douglas Point) is a General Managed Use Zone, where all fishing, harbor, recreation and commercial activities are authorised.

The southern portion of the Whyalla region is subject to special purpose zones for harbour activities.

The Restricted Water Bodies Area which extends around the Port Bonython Jetty is shown on Figure 2.6.

In addition, the SA State Government has implemented a temporary closure (since March 2013 and officially until 15 February 2017) to cuttlefish fishing which extends to the whole of the northern Spencer Gulf (refer Figure 2.7), in order to facilitate ongoing research into the behaviour of the cuttlefish.

Whether this is due to the temporary closure or not, it is noted that the 2014 records show an increase of cuttlefish to 57,317, as compared to 13,492 in 2013.



Source: City of Whyalla

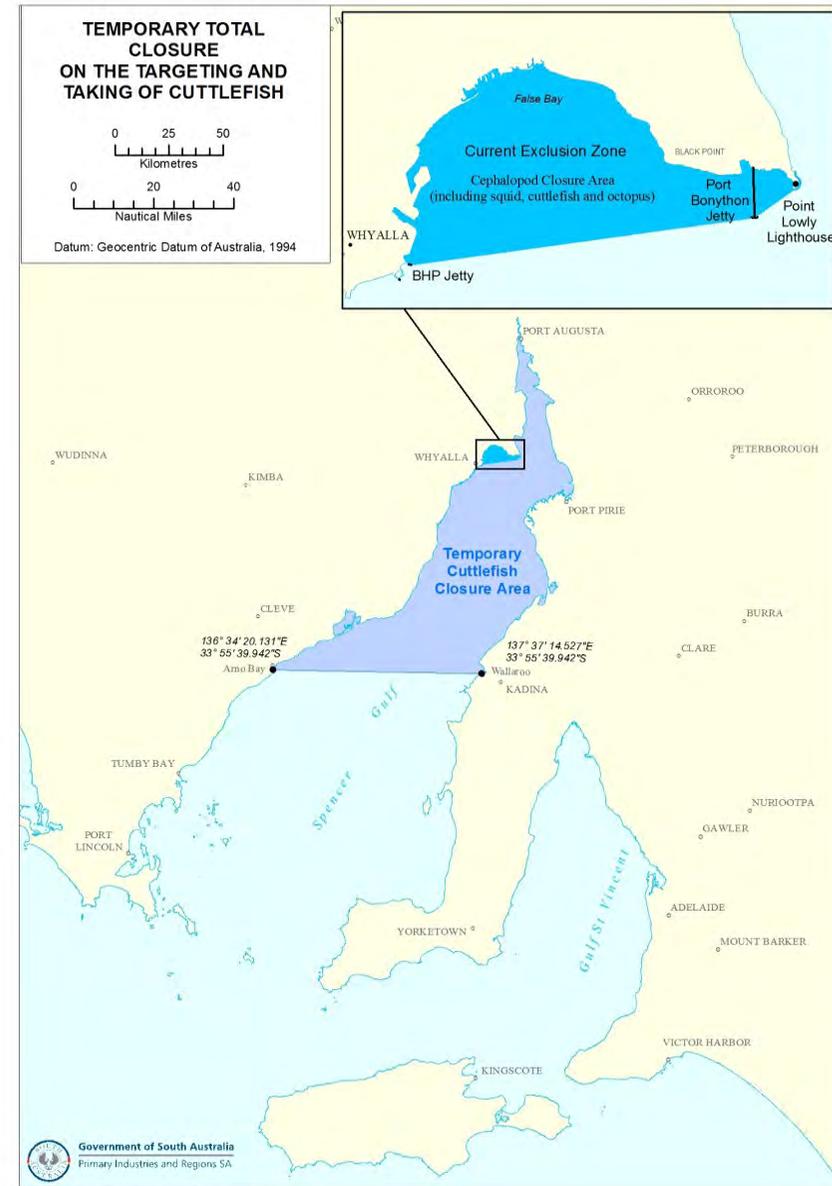
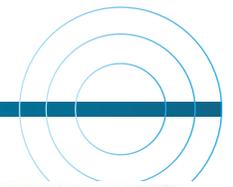


Figure 2.7: Cuttlefish Closure Area

Source: PIRSA



## 2.4 Recreation & Tourism Activities

The Study Area has a long accommodating history of recreation uses. Dating back to the late 19<sup>th</sup> century, day excursions were organised from Port Pirie and Port Augusta to Point Lowly to spend the day fishing, boating, crabbing etc. During the 20<sup>th</sup> century, a holiday camp used to host smelter workers and their families from Port Pirie, at Weeroona Bay. The camp was relocated to Weeroona Island in 1929.

Since then, assets a range of recreation and tourism remain or have been established in the Study Area. These assets are identified on Figure 2.8 and include:

- Lighthouse complex, which includes two cottages that are presently used for accommodation purposes. These are owned and managed by the Whyalla Council, following a number of years under the management of Uniting Church;
- Camping grounds at Point Lowly, including showers, toilets, and playground. These are managed by the Council;

- Adjacent to the camping grounds are a marina and two boat ramps, one being for leisure boats and the other for commercial/fishing boats;
- A number of bush camping sites along the coastline between Point Lowly and Fitzgerald Bay;
- A number of diving spots along the southern coastline, particularly within the Sanctuary Zone which is known as the breeding area for the Giant Cuttlefish; and
- A walking trail known as the Freycinet trail of a length of approximately 8 kilometres. The trail extends from Point Lowly to the southern portion of Fitzgerald Bay.

Weeroona Bay, however, has been closed to the public and is now located within the buffer zone around the Santos plant.



Figure 2.8: Recreation and Tourism Infrastructure

These assets encourage a range of recreation and tourism activities in the Study Area:

- Recreational fishing;
- Boat launching - fishing;
- Camping - formal and informal;
- RV;
- Snorkelling and diving;
- Hiking and cycling; and
- Four wheel driving, mountain biking and motor biking, using formal and informal tracks across the Study Area. Tracks are shown on Figure 2.9.

It is further noted that some areas are informally used for four-wheel driving.

Whilst a marina and built boat ramps exist at Point Lowly, a number of users launch their boats directly from the beach, particularly at Fitzgerald Bay.

A range of formal and informal activities occur off-shore from the Study Area. These include:

- Fishing - on and off shore, noting that charter trips are organised for visitors. Locals tend to use their own boats;

- Diving/snorkelling, noting that diving/snorkelling/dolphin trips are organised for visitors; and
- Kayaking, windsurfing, and other aquatic activities.

## 2.5 Access

As identified by Figure 2.9, the Study Area is only accessible via Point Lowly Road, a sealed road which connects with the Lincoln Highway.

Fitzgerald Bay Road (or Gulf View Drive) connects from Point Lowly Road, providing direct access to Fitzgerald Bay. The road then continues unsealed along the Bay and the coastline, with the exception of a sealed portion at Backy Point.

The road physically continues north of Point Douglas, however it is within land controlled by the Department of Defence and is now permanently closed to the public. Discussions have occurred in the past to open this road to the public however such an outcome remains unlikely, which was confirmed during the consultation process for this project.

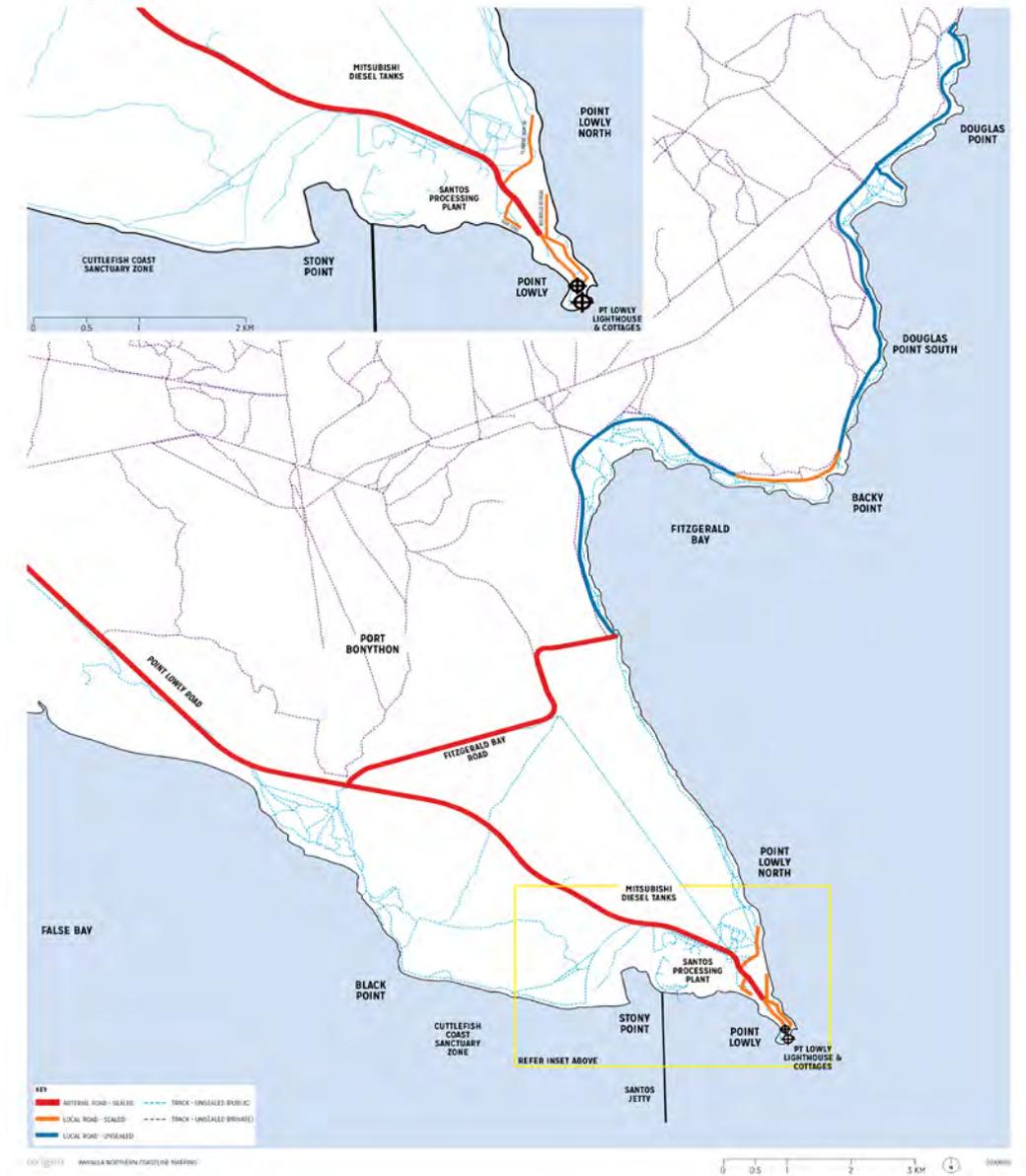


Figure 2.9: Road Infrastructure



**Table 2.1: Zoning**

<b>Zone</b>	<b>Primary Objective</b>	<b>Key Envisaged Uses</b>	<b>Existing Uses</b>
Coastal Conservation	To enhance and conserve the natural features of the coast  Low-intensity recreational and tourist accommodation where environmentally appropriate	Conservation works Interpretive signage and facilities Nature-based / eco-tourist accommodation Facilities associated with public recreation etc (e.g. toilets)	Bush camping Camping grounds Diving infrastructure Portion of the buffer zone around Santos plant
Coastal Settlement	Protection of the natural coastal environment from inappropriate development	Coastal protection work Detached dwelling Tourist/visitor facilities (other than accommodation)	Dwellings
Settlement	A mixed use village environment in Point Lowly with small collection of low-density dwellings, holiday accommodation, recreation and community facilities.	Dwelling Holiday house Local community facility Shop or group of shops under 250 square metres in size Recreation area/ facility Supported accommodation Tourist related accommodation	Dwellings Camping grounds and associated facilities
Coastal Open Space	Coastal land protected from development other than that necessary for conservation, recreational activity and public facilities  Development designed to be sympathetic to the heritage value and historical significance of the zone including the Point Lowly Lighthouse and Lighthouse cottages	Coast protection works conservation works Jetty and boat ramp Public car parking Recreation area Sporting club facilities directly related to water activities Toilet blocks and barbeque facilities	Lighthouse Cottages Access to beach
Coastal Marina	A zone that provides for a marina and maritime structures	Boat berth Boat construction, maintenance, repair or sale Boat servicing facility Coastal protection works Loading and unloading facilities Marina and associated club room Car parking area Small scale tourist development	Boat ramps/marina and associated infrastructure



The Point Lowly Settlement Zone Concept Plan Wh/1, as contained in the Whyalla (City) Development Plan applies to a portion of the Study Area. This Concept Plan is reproduced as Figure 2.11.

Offshore, portion of waters adjacent to the Study Area are located within the Aquaculture Zone. These areas are identified in Figure 2.10, and were used for aquaculture for a number of years, however are not currently active. Some operators have active leases/licenses which are valid until 2023.

An aquaculture exclusion zone exists which provides a buffer between aquaculture development, other marine resource uses and areas of high conservation significance. This zone includes:

- A 1 kilometre buffer around Port Lowly which incorporates three shipwrecks; and

- A one kilometre buffer around Backy Point and south along the beach in order to protect aboriginal heritage sites.

Clean Seas and Southern Star Aquaculture have indicated that their kingfish farming activity could resume in the short to mid term at Fitzgerald Bay. Associated land infrastructure would be necessary and is likely to comprise:

- Office buildings;
- Shed/warehouse; and
- A new boat ramp, jetty and wharf.

Such future land infrastructure is likely to be established between Fitzgerald Bay and Point Lowly.



Figure 2.11: Concept Plan Map Wh/1

## 2.7 Indigenous Land & Heritage

The Study Area is significant to the local aboriginal community. The Spencer region is the traditional land of the Barngarla people, who gained Native Title in 2015.

A vast portion of the Study Area is therefore subject to Native Title, which Native Title has however been extinguished on Defence and industrial land. This is shown on Figure 2.12.

Native Title has also been extinguished in that portion of the State Government owned land adjacent False Bay, which is under the care and control of the City of Whyalla, with only a narrow strip of land being subject to Native Title and corresponding to the coastal track.

There are sites along the coast, predominantly located near Fitzgerald Bay, that are culturally significant to the Barngarla people. The sites are both archaeological and mythological and predominantly include the Seven Sisters Dreaming track, which begins in Whyalla and extends north to Coober Pedy. Sites along the coast include, for example, fish traps and camp sites.



Source: Kapululangu Culture Camps



Source: Kapululangu Culture Camps



Source: Seven Sisters Songline

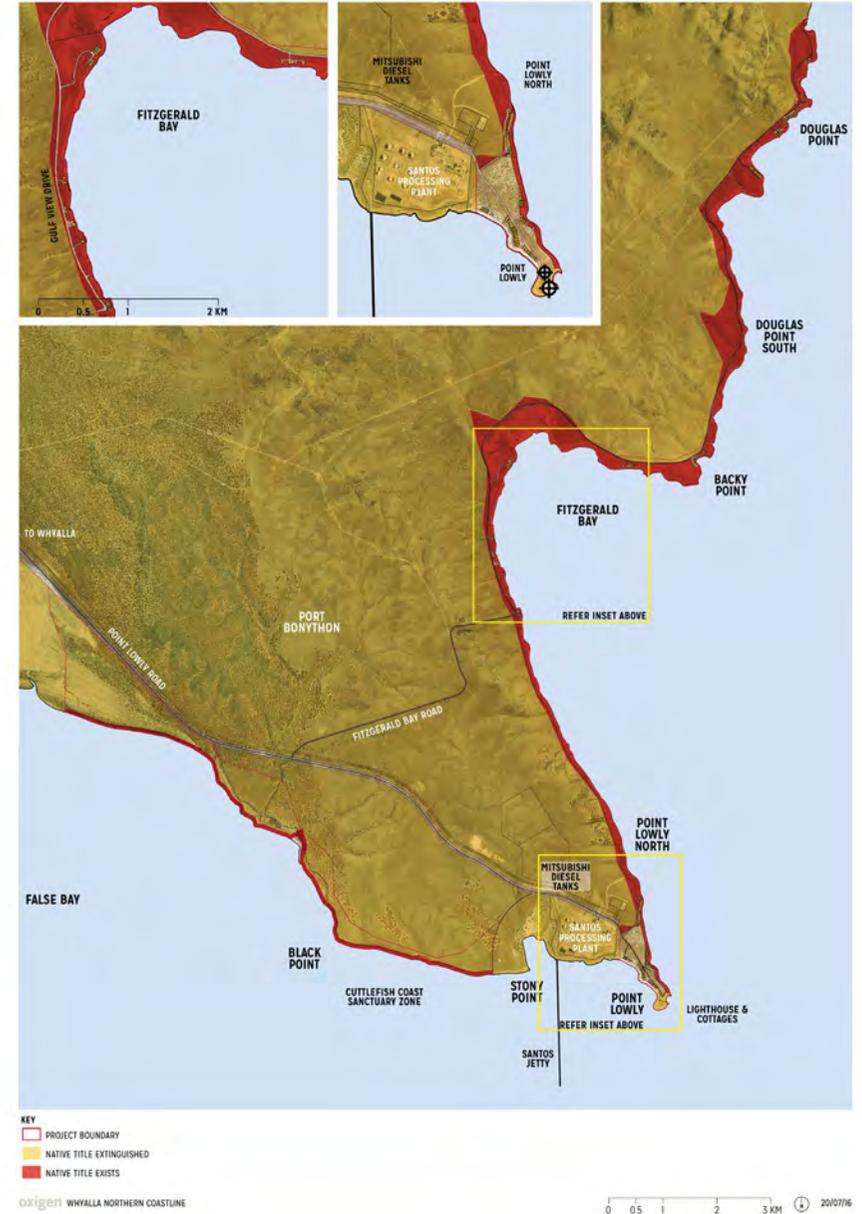
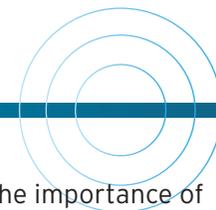


Figure 2.12: Native Title



### 3. STRATEGIC CONTEXT

#### 3.1 South Australian Planning Strategy - Eyre and Western Region, 2012

The Planning Strategy identifies the planning priorities, principles and policies necessary to achieve community and economic targets outlined by the South Australian Government. The key principles of the Plan that are relevant to this Master Plan are listed below:

- Recognise, protect and restore the region's environmental assets. The Plan considers the importance of marine parks and coastal areas, and the need to protect them, and recognises the importance of the Australian Cuttlefish spawning congregations. Scenic landscapes are also regarded as an important regional economic and recreational driver and should be protected;
- Strengthen the commercial fishing and aquaculture industries. Fitzgerald Bay is recognised as an

area with "significant potential" for aquaculture. Whyalla is generally recognised as an area with potential for fish processing;

- Reinforce the region as a unique and diverse tourism destination. Key aspects to retain and improve encompass "a unique and diverse range of nature-based visitor experiences related to its scenic landscapes, ecotourism and unique wildlife, as well as coastal recreation, seafood, adventure tourism and Aboriginal culture". Opportunities may include trail networks (walking, cycling, scenic, four-wheel drive), eco-tourism experiences, conservation reserves, cultural facilities, accommodation and food businesses and co-located experiences with other sectors (e.g. industry, aquaculture);
- Provide and protect industrial land to meet projected demand. Whyalla is recognised as the region's major industrial hub and should be maintained as such. Defence facilities are also considered, with the need to establish appropriate buffers; and

- Identify and protect places of heritage and cultural significance, and desired town character. Places and items of significance should be identified and protected.

It is acknowledged in the Planning Strategy that economic development needs to be supported by adequate infrastructure.

#### 3.2 SA Tourism Plan 2020

The State Government seeks to maximise the benefits of tourism for the South Australian economy, and aims to grow visitor expenditure to \$6.7b by 2020 (as compared to \$5.2b in June 2014). The SA Tourism Plan 2020 forecasts strong growth in overseas and interstate expenditure, with a slower growth in intrastate spendings.

When releasing the Plan, the State also announced the aim to reach a total of 41,000 direct jobs in tourism (i.e. a growth of 10,000 jobs since December 2013).

The Plan recognises the importance of marketing and promotion, as well as the need to grow off-peak visitation and to leverage off existing infrastructure and assets.



Source: PIRSA



### 3.3 SA Nature Based Tourism Action Plan

The SA Nature Based Tourism Action Plan recognises the opportunities that exist to link tourism and conservation areas without endangering natural assets.

Research used to inform the Plan showed that “all trips that include a nature-based activity account for \$1.1 billion in expenditure in SA each year”. The goal of this Plan is to increase this value to \$1.45b by 2020 and generate 1,000 new jobs (since 2015).

Nature-based tourism is already a significant contributor to some regional economies but may be improved via the following actions which are relevant to this Master Plan:

- Action 1: Support existing and create new nature based tourism experiences; and
- Action 4: Raise awareness of South Australia’s unique appeal.

The importance of adequate and/or new infrastructure, promotion and marketing, and local/regional support is noted with a particular focus on walking journeys and marine experiences.

### 3.4 RDA Regional Plan 2014-16 and Annual Report 2013-14 and 2014-15

In RDA’s Regional Plan 2014-16, economic development is described as a key priority, with key opportunities for the region identified as mining, manufacturing, and renewable energy development. Tourism is also described as a key growing sector.

The RDA region is “world renowned for its premium seafood product” and launched a brand ‘Eyre Peninsula Australia’s seafood frontier”, which was awarded an SA Tourism Award in 2014.

Whilst fishing and aquaculture are relatively small employment sectors compared to other industries, “there is substantial opportunity for further growth through marketing the region as a culinary tourism destination”. Generally, the region focuses on the promotion of nature-based experiences.

This is consistent with the below regional priorities that are relevant to the Master Plan:

- Consider the environment when planning regional development: the environment should be preserved and enhanced and is considered as a key leverage for tourism, especially the coastal environment; and
- Strengthen, foster and promote the region’s business and product diversity: tourism would increase the region’s competitiveness and reputation.

The RDA supported the preparation of a design study for a Cuttlefish Interpretive Centre and interpretive redevelopment of the Visitor Centre. Due to lack of funding, this project has been put on hold.

In 2014-15, the RDA supported tourism-related projects in Whyalla, including the preparation of a background paper for the development of a Cuttlefish Interpretive Centre and a business case for the redevelopment of the Visitor Centre (refer 2.12).

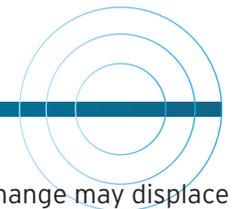
In liaison with LGASA and EPLGA, RDAWEP also progresses the development of a range of marketing and promotional materials for event organisers and direct consumers.

### 3.5 Spencer Eyre Peninsula NRM Sub-Regional Plan - draft

The Eyre Peninsula NRM Board is currently updating the Sub-Regional Plan for the Spencer area. This area extends west from the Spencer Gulf to the foothills of the Middleback Ranges, and south to the Munyaroo Conservation Park.

This document identifies the importance of the Northern Coastline of Whyalla, and describes it as:

*“particularly cherished by locals, with places like Point Lowly and Fitzgerald Bay being “post card stuff, it’s just gorgeous”. The area “makes you feel that this is something different - with the pebble beaches, mangroves, clear waters and the backdrop of Flinders Ranges, it’s unique and very special”. A particularly unique and valued feature is the shingle stranded dune that runs along Fitzgerald Bay, with one community member saying this needs to be “recognized as a geological feature with Aboriginal significance.”*



[...] It also has historical significance with the lighthouse and the associated cottages provided a great place for holidays.

Other aspects that are relevant include:

- The marine biodiversity (cuttlefish and dolphins);
- The area is well suited to a range of activities (e.g. fishing, diving, wind surfing, sailing, swimming, bird watching); and
- Commercial fishing and aquaculture activities, which are a “source of livelihood for some”.

The draft plan also identifies a number of issues in the Spencer subregion that are relevant:

- Coastal degradation as a result of human impacts including:
  - » off-road vehicle damage (e.g. 4WD and quad bikes);
  - » litter from land and marine sources;
  - » stormwater; and
  - » visitor access management;

- Land use conflict between the highly valued Northern Coastline and the future industrial development relating to the Port Bonython expansion. Maintaining the Northern Coastline for recreational use is considered key for the “liveability of Whyalla”; and
- Need for economic diversification for Whyalla.

### 3.6 Regional Climate Change Adaptation Plan for the Eyre Peninsula

The Regional Climate Change Adaption Plan refers to previous investigations to state that:

*“The Eyre Peninsula will be impacted by climate change through warmer and drier conditions on the land, rising sea levels on the coast and changing temperatures and pH in the Great Southern Ocean and in Spencer Gulf”*

This is likely to impact in multiple ways on the Study Area, given its coastal location, and on some aspects of the Master Plan, given the importance of recreational fishing and diving for tourism in the area.

The Plan focuses on eight issues, including four that are relevant to this Master Plan:

- Conservation management: large scale refuges within the region will need to be created;

- Fisheries: climate change may displace fishing fleet and infrastructure, with a range of potential positive and negative environmental and economic impacts on the region;
- Management of coastal development: some areas will be subject to sea level rise and new development may be prevented in some areas and redirected to safer land, whilst existing development will need to be adapted and/or protected; and
- Port and wharf facilities: a new port and wharf facility for the Eyre Peninsula is expected by 2023.



### 3.7 Eyre Peninsula Coastal Action Plan and Conservation Priority Study

The Eyre Peninsula Coastal Action Plan and Conservation Priority Study seeks to understand the region’s coastal natural resources and potential threats and opportunities for more effective management. The coastal zone was divided into 85 cells to facilitate the assessment. The relevant cell to this study is cell EP2 Port Bonython, i.e. the coastal reserve between Backy Point and Black Point.

Throughout cell EP2, environmental assets include the presence of the cuttlefish breeding area, and the stranded shingle beach ridges found along Fitzgerald Bay.

The assessment of cell EP2 found that Point Lowly was subject to the highest concentration of threats within this cell, with:

- Weed infestation;
- Dune erosion from vegetation loss and beach recession;

- Marine debris;
- Uncontrolled RV use and camping, including firewood collection; and
- Future industrial expansion.

Potential impacts on Aboriginal heritage sites also exist throughout the coastal reserve.

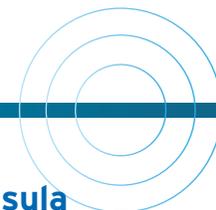
The report provides suggestions to improve the management of the area, including weed control, dune blowout management, and closer monitoring.

- With particular respect to camping, the preparation of a camping management plan or the formalisation of camping zones was suggested, as well as improved signage, fencing and weed management;
- In relation to RV activity, the development of an access/traffic management plan and the upgrade of tracks or car parks, with better signage, were also predicated. It is noted that a Study is presently being undertaken for the whole of the Eyre Peninsula in relation to coastal access (see Section 3.8);

### 3.8 Eyre Peninsula Coastal Access and Off-Road Vehicle Strategy

This strategy aims to improve the management of coastal access in the region. It is being prepared at the same time as this Master Plan. Action Plans arising from the Master Plan should have regard to the outcomes of this strategy.





### 3.9 Upper Spencer Gulf Marine Park Management Plan Summary

As show on Figure 3.1, the locality adjacent to the Study Area is subject to a range of Marine Park Zonings, including:

- SZ-5 Sanctuary Zones Cuttlefish Coast, which allows general navigation, recreational activities such as diving, boating, walking, surfing, but restricts a number of activities (no recreational or commercial fishing, competitions and organised events etc). It further restricts coastal development and infrastructure such as marinas, jetties, pontoons, breakwalls, renewable energy infrastructure. Subject to permits or limits, it allows tourism operations, domestic animals, research and non-fishing competitions or events;
- SPA -5 Harbor Activities;
- SPA-8 Shore-based recreational line fishing;

- GMUZ-2 General Management Use Zone, with no particular exception expect for mineral or petroleum processing; and
- Cephalopod fishing closure area (including squid, cuttlefish and octopus), which encompasses the southern portion of the Study Area, west of Point Lowly.

Based on this zoning, there is no real restriction on tourism activities, the exception being restricted recreational

fishing in that portion of the Sanctuary Zone that is not within the Special Purpose Area (i.e. to the east of Black Point and to the west of Port Bonython).

While it is noted that no coastal development and infrastructure is permitted in the Sanctuary Zone, including tourism infrastructure such as jetties or pontoons, it is further understood that a permit system can be put in place to introduce activities such as tourism operations, organised events and moorings in such zones.

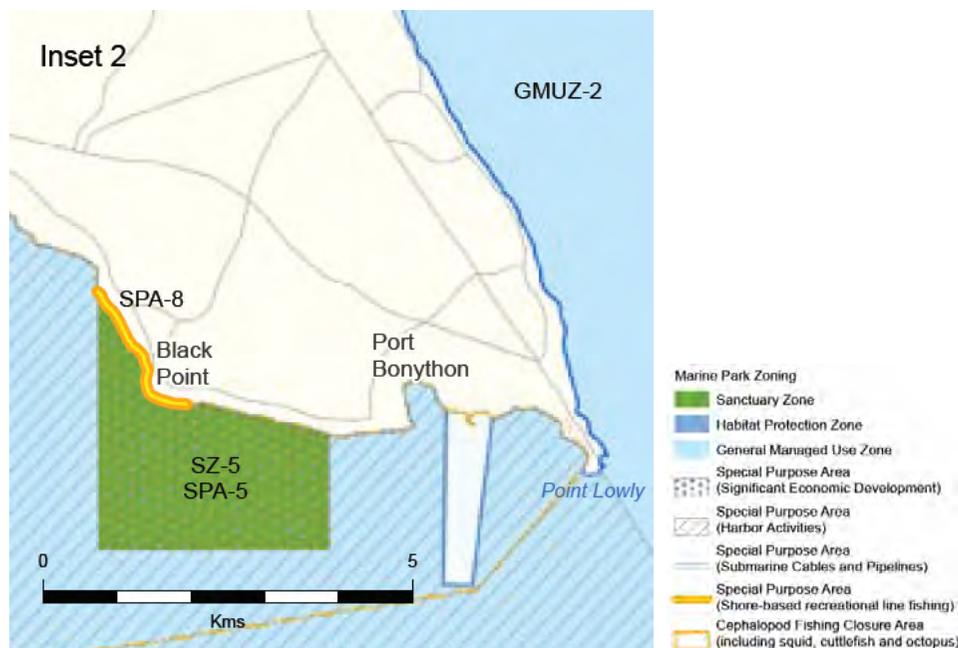


Figure 3.1: Marine Park Zoning

### 3.10 Eyre Peninsula Destination Action Plan (DAP) 2012-2015

The Eyre Peninsula Destination Action Plan identifies that the region attracts a mix of intrastate, interstate and international visitors, with some of the highest predicted growth in the state, despite low consumer awareness. Opportunities exist in relation to:

- a growth in the region's seafood product brand and experiences;
- a growth in fly-in market;
- raising awareness with additional marketing and promotion, including the 'seafood frontier' brand with promotion and events;
- creating new nature-based and/or self-drive and/or culinary experiences; and
- ensuring an adequate tourism industry with bookable operators (through agents and online) and marketing.

The DAP also identifies that all strategic gaps had been addressed in relation to RV facilities.

However, there may be opportunities to further attract this sector, to the Study Area (e.g. with the establishment of running water, waste water dumps).

### 3.11 Whyalla City Council Strategic Plan 2015-16 to 2019-20

The Council seeks to support a diversified and sustainable economy and to attract future industries such as manufacturing and mining.

The Whyalla Foreshore is also considered as a key recreational, fishing, commercial and residential area which should be further enhanced with hotel and conference facilities.

Tourism and branding are identified as part of Council's Top Ten Priority Listing.

Council seeks to develop tourism in the city and the wider region, by taking a "leadership role", by supporting events, enhance the image of the city as a destination and expanding the range of accommodation.

Landscapes should also be managed and protected in order to ensure that "developments in areas of high natural value are sympathetic to the natural environment".

### 3.12 City of Whyalla Tourism Strategic Plan 2015-18

The Tourism Strategic Plan is based on five strategic themes which are all relevant to the Master Plan:

- Provide an environment conducive to investment and growth;
- Develop sustainability, infrastructure and capacity, with marine environs considered as essential to the visitor experience;
- Seek to provide the best in visitor experiences;
- Increase visitor numbers arriving by air and road, through marketing and product development; and
- Develop and build events capacity and capability.

It is noted that the Point Lowly Lighthouse and cottages and the Northern Coastline in general are listed as tourism assets.

The Plan also identifies key potential niche market opportunities to capture Experience Seekers<sup>7</sup>:

- Eco & marine tourism; nature based;
- Visiting Friends and Relatives (VFR);
- M I C E - Meetings, Incentives, Conferences and Events;
- History and heritage; and
- Industrial and educational tourism.

In order to achieve the above strategies, the Plan provides "Game Changing Projects". These included the development of a Master Plan for the Northern Coastline, and other projects which should inform this Master Plan, including:

- a Marine Discovery Centre, potentially co-located with a new Visitor Information Centre;
- a hotel Complex, at the Whyalla Marina;
- a Whyalla Industry Heritage Centre, developed inside the existing Maritime Museum Precinct;

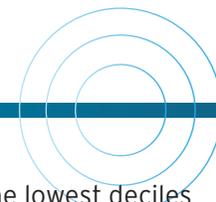
<sup>7</sup> Experience Seekers are described as experience international travellers, who seek original, varied, active (if not adventurous) and personal experiences, in contrast with their day-to-day lives (Tourism Australia).

- a Tourism Hub, within the Whyalla Marina precinct;
- the development of value-adding experience at Point Lowly; and
- the rebranding and repositioning of Whyalla, taking into consideration key themes such as industrial history and the cuttlefish.

### Key Findings

A high level of consistency exists between the various strategic documents. Key themes emerging from the strategic review include:

- Build on natural and cultural heritage;
- Grow eco-tourism, with nature-based tourism, particularly marine experiences, including the Cuttlefish;
- Grow the seafood industry and aquaculture;
- Protect the environment and biodiversity, prevent future degradation and minimise the effects of climate change; and
- Raise awareness and promotion.



## 4. Socio-Economic Context

### 4.1 Demographic Context

#### 4.1.1 Population

Based on the ABS Census, Whyalla had a population of 22,088 in 2011, down from approximately 33,000 during the flourishing shipbuilding years in 1975-76<sup>8</sup>. Following closure of the shipyards in 1978, the population started to decline, with rise and falls occurring in response to local economic factors.

The Estimated Resident Population of Whyalla was 22,759 persons in 2015<sup>9</sup>.

Key characteristics are highlighted in Table 4.1.

The population of Whyalla is relatively young compared to the South Australian average, with a smaller proportion of people over 60 years of age, and a median age of 38 (39 in SA).

Incomes but also cost of living is comparatively lower in Whyalla.

Whyalla is listed in the second lowest decile of the Index of Relative Socio-economic Advantage and Disadvantage<sup>10</sup>.

The Index of Economic Resources (IER) summarises variables relating to the financial aspects of relative socioeconomic advantage and disadvantage. These include indicators of high and low income, as well as variables that correlate with high or low wealth. Whyalla is listed in the lowest decile of the IER.

The Index of Education and Occupation (IEO) summarises variables relating to the educational and occupational aspects of relative socio-economic advantage and disadvantage.

This index focuses on the skills of the people in an area, both formal qualifications and the skills required to perform different occupations. Whyalla is listed in the lowest decile of the IEO.

An area ranked in the lowest deciles indicate high levels of disadvantage.

**Table 4.1: Key Socio-Demographic Characteristics**

Characteristics	Whyalla	South Australia
Population		
0-4	6.6%	6%
5-9	6.6%	5.8%
10-14	6.9%	6.1%
15-24	13.4%	13.1%
25-39	18.7%	19.1%
40-59	27.5%	27.5%
60-74	20.4%	22.3%
+75	6.1%	7.8%
Median age	38	39
Median weekly household income	\$934	\$1,044
Owned private dwellings (outright or with mortgage)	58.1%	68.1%
Rented private dwelling	39%	27.9%
Less than \$600 gross weekly income	34.2%	27.7%
Households where mortgage payments are 30%, or greater, of household income	6%	8.8%
Median rent	\$150	\$220

Source: ABS Census 2011

<sup>8</sup> Whyalla Council

<sup>9</sup> ABS, Regional Population Growth, Local Government Areas

<sup>10</sup> ABS, Socio-Economic Index for LGAs. All areas are ordered from lowest to highest score, the lowest 10% of areas are given a decile number of 1 and so on, up to the highest 10% of areas which are given a decile number of 10.

This means that areas are divided up into ten groups, depending on their score. Decile 1 is the most disadvantaged relative to the other deciles.

### 4.1.2 Employment

Key industries of employment in 2011 are identified in Table 4.2 below.

Basic Ferrous Metal Manufacturing was evidently the major industry in 2011.

It is further noted that the number of businesses has decreased in every industry between 2012 and 2015 with the exception of financial services (ABS 81650).

**Table 4.2: Employment Characteristics 2011**

Characteristics	Whyalla	South Australia
Basic Ferrous Metal Manufacturing	17.9%	0.5%
School Education	5.5%	4.6%
Hospitals	4%	3.9%
Retail	3.5%	2.8%
Cafes and restaurant	3.2%	3.9%

ABS Census 2011

As shown by Table 4.3, unemployment fluctuated between 2011 and 2016, with quarterly peaks of 10% in 2014, and a rate of 8.6% (7.1% in SA) as of March 2016 (Australian Department of Employment).

<sup>11</sup> Ibid.

**Table 4.3: Average Unemployment Rate (%)**

Year	Whyalla	South Australia
2011	6.6%	5.3%
2012	6.9%	5.5%
2013	7.6%	6.3%
2014	9.5%	6.7%
2015	7.3%	7.4%

Source: Australian Department of Employment

## 4.2 Manufacturing & Mining Industries

Manufacturing and resource processing is the largest industry sector in Whyalla. Whyalla is the key regional centre for manufacturing, steel production and resource processing in the Upper Spencer Gulf region.

The manufacturing sector alone contributes approximately \$341 million p.a. to the State's gross regional product<sup>11</sup>. This sector represents 22.3% of employment and is the main employing industry in Whyalla (ABS).

In recent years steel making with OneSteel-Arrium at Whyalla has increased significantly from 460 thousand tonnes to a rate of 1.1 million tonnes per annum.

The sector employs 3,331 people accounting for 13.5% of regional employment. The future of steel making in Whyalla is uncertain with Arrium recently being placed into receivership.

The establishment of a new fuel storage/distribution infrastructure (Mitsubishi) in Port Bonython has also created a new fuel supply gateway for the northern and western regions.

The growth of the mining sector in the region will also generate potential benefits for the Whyalla economy.

Other employment generating activities are being investigated in the region, including renewable energy projects.



Source: Herald Sun



Source: Mining Monthly



### 4.3 Fishing & Aquaculture Industry

The Eyre Peninsula is by far the leading region in the aquaculture sector in South Australia and has a noted reputation as a seafood producer. The region's commercial fishing and aquaculture industries in the Eyre Peninsula provide approximately 80% of South Australia's seafood product<sup>12</sup>. The combined value of this industry exceeded \$200 million in 2014<sup>13</sup>.

Specifically, two main aquaculture zones exist offshore from the Study Area, which are partially being operated.

Active licenses and production leases exist for the farming and establishment of sea cages for Finfish, yellow tail kingfish and snapper. These are held by Clean Seas Tuna Ltd/Clean Seas Aquaculture Growout Pty and Southern Star Aquaculture Ltd.

Some licenses expired in February 2016.

A sizeable portion of the existing aquaculture zones are not currently under any lease or license.

It is anticipated that Kingfish farming activity will resume in the coming years at Fitzgerald Bay, with land-based facilities to be established between Fitzgerald Bay and Point Lowly.

It was indicated during consultation that other aquaculture activities (mussels for example) had potential in the area.

The Department of Primary Industries and Regions, SA (PIRSA) has also indicated that there was potential for Whyalla to develop its land-based aquaculture activity.

The industry provided a total of 1,211 FTE aquaculture in 2012/13, which represented more than 80% of total jobs in this sector in South Australia.

The RDA WEP and the Eyre Peninsula food industry have developed the "Eyre Peninsula, Australia's Seafood Frontier" brand which seeks to promote the region's products and traders.



Source: PIRSA



Source: PIRSA



Source: PIRSA



Source: PIRSA



Source: DENWR

<sup>12</sup> EPICCA, Regional Climate Change Adaptation for the Eyre Peninsula, 2014

<sup>13</sup> Ibid.

## 4.4 Tourism Sector<sup>14</sup>

### 4.4.1 Contribution to the Economy

The tourism sector is growing in the Eyre Peninsula region which was ranked fourth overall in the comparative importance of tourism across SA's regions in 2013-14, supplying 4.6% of the state-wide contribution of tourism.

The sector was estimated to contribute \$293 million to the regional economy in 2013-14<sup>15</sup>.

Total tourism expenditure reached \$568 million in the same period (of which \$208 million in direct output).

In terms of contribution to tourism, long distance transport, retail food businesses and fuel were the key items of tourism consumption.

### 4.4.2 Employment

The tourism industry directly employed approximately 1,500 persons (including 46.4% full and 53.6% part time) in 2013-14, representing 6.4% of regional employment, and another 1,500 persons (including full and part time) indirectly<sup>16</sup>.

Direct employment that contributed most to regional tourism employment was primarily at food and beverage retail, other retail trade and accommodation.

### 4.4.3 Businesses

A total of 150 tourism businesses were recorded in Whyalla in 2013, of which 8 were recorded as tourist accommodation (hotel, motel or serviced apartment of more than 15 rooms<sup>17</sup>). These 8 establishments supply more than 35% of the regional room and bed stock, and employ a total of 222 persons. This does not reflect other types of accommodation such as caravan parks (three in the Whyalla township) or holidays rentals (at least two advertised as such in the Study Area).

### 4.4.4 Airport

The Whyalla airport is a key asset for accessibility to the Region. Both Rex Airlines and Qantas Link provide services to and from Whyalla.

With respect to passenger profile, the master plan prepared in 2014<sup>18</sup> highlighted the below characteristics:

- Importance of mining and resources industry aged between 25-44; and
- The traveller makes an average four annual trips to Whyalla, with a length of stay between 1 and 7 days, and stays in a hotel/motel.

Commuters and short-term/fly-in fly-out workers are the key market segment for the airport, with holiday-makers more inclined to road transportation.

### 4.4.5 Previously Identified Tourism Opportunities

#### Cuttlefish Interpretive Centre

A Scoping and Design Study was undertaken in 2012 to determine the viability of an interpretive facility.

Key characteristics of the proposed Centre are outlined below:

- The Centre should consider the broader marine environment of the Upper Spencer Gulf, without only focusing on the cuttlefish;
- The facility could be split into a number of strategic locations, with one main Centre and satellite smaller facilities;
- Boat and diving tours are essential to maximise the experience; and
- Commercial and/or community facilities may be integrated.

<sup>14</sup> Tourism SA/TRA, Regional Tourism Satellite Account Eyre Peninsula 2013-14

<sup>15</sup> Tourism SA

<sup>16</sup> Ibid

<sup>17</sup> ABS, Tourist Accommodation, Small Area Data, SA, June 2013

<sup>18</sup> The Airport Group, Whyalla Airport Master Plan, 2014



The analysis considered two sites located at Point Lowly and on the Whyalla Foreshore. Indicative cost plans were also prepared for both options:

- Option A: Main facility on Lowly Peninsula, with associated satellite facilities on the Peninsula including a research lab, and in Whyalla. Option A1 looked at a Centre constructed over water, and Option A2 at a Centre constructed on land; and
- Option B: Main facility at the Whyalla foreshore, with associated satellite facilities in Whyalla including a exhibition space, and on the Peninsula.

As previously mentioned, this study could not be progressed further, due to lack of funding, and does not consider the cost of the design and installation of interpretive displays.

However, a Background Paper was prepared in March 2015 which analysed the benefits of a Cuttlefish Interpretive Centre (CIC). Key elements of the Paper are listed below:

- The CIC is considered as both a catalyst for economic development and an opportunity to change the negative image of Whyalla. It would become Whyalla's key attraction;
- The Point Lowly location is not considered viable due to lower potential visitor numbers, and would not create the same benefits for the wider Whyalla region;
- The Point Lowly location is however considered appropriate to support snorkelling and boating activities, with the installation of visitor shelters;
- A research laboratory would also be built at Point Lowly;
- The Visitor Centre is best located at its existing location, with potentially some satellite elements of the CIC to be integrated;

- Interpretive elements were estimated, bringing the total cost of the facility to approximately \$20 million; and
- The CIC is likely to secure government funding.

A report prepared by Andrew Robertson Marketing & Consulting for the SA Tourism Commission<sup>19</sup> assessed the tourism potential and commercial fishing potential of the cuttlefish at Whyalla in order to estimate the likely economic benefits of these activities.

From a tourism perspective, it was estimated that the cuttlefish tourism in Whyalla "generated \$580,000 in 2002" without any promotion or tourism effort, and "could increase to \$1.076 million" within five years with the development of an appropriate strategy.

Target markets were identified as below:

- Dive and snorkelling market;
- Accompanying members; and
- Eyre Peninsula drive market (domestic and international).

An increase of 19% in visitor numbers on Whyalla's total holiday/leisure/VFR visitor numbers of 40,000 was forecast (e.g. an additional 7,600 in 2008), as well as an increase of 9% in total visitor nights (e.g. an additional 12,330 nights in 2008), representing an additional \$829,870.

The report also investigated the infrastructure requirements necessary to develop activities around the cuttlefish theme:

- Improving the Point Lowly facilities, including the boat ramp (this has been addressed), and other basic facilities (toilets, car park);
- Improving the road along Fitzgerald and False Bays;
- pontoons off Black and Stony Point, basic facilities (e.g. toilet) and car park;
- Signage; and
- Accommodation near Point Lowly and a major interpretive centre.

<sup>19</sup> Andrew Robertson Marketing & Consulting, Tourism Potential of the Cuttlefish at Whyalla, 2003.

## Dolphin Research Centre

A Dolphin Research and Tourism Centre for Whyalla has recently been proposed and considered by the City of Whyalla.

While environmental concerns remain, the proposal is supported in principle by the South Australian Government particularly considering the likely economic benefits this would have, noting anecdotally that the Monkey Mia resort in WA attracts 100,000 visitors a year.

The City of Whyalla has indicated its support for the development of an integrated facility including a Cuttlefish Interpretative Centre / Marine Discovery Centre with a mixture of commercial and research elements (e.g. retail/café, exhibition, tourist information and research etc).

## Artificial Reef

Federal Defence is proposing to decommission a number of vessels and offer them to State Governments. While there has been no formal discussions between Council and the State Government, the topic was raised at one of Whyalla Council's meetings and the following motion was passed: "That Council write to Senator Marise Payne to express interest in one of the two ships HMAS Tobruk and Sydney to be used as an artificial reef in our Gulf for recreational divers." Two years of decommissioning work to strip and prepare the boat for sinking are likely to be required, with an estimated cost of \$10 million, and an associated employment of 50-80 workers.

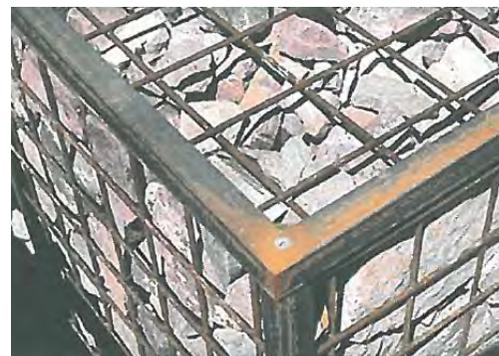
Long term economic benefits will also occur from this artificial dive site.

Whilst three shipwrecks exist off Point Lowly, these have been described as having little potential to attract divers given their condition.

## Cuttlefish Drive Project

Funding for improvements to the Cuttlefish Drive area was sought in January 2016. The improvements seek to enhance the diving experience in the area and the overall marine experience.

The proposed built infrastructure remains light and discreet and seeks to emphasise the unique views. The key node is located at Stony Point adjacent to the Santos fence line. A range of basic infrastructure was proposed including (tables, access ramp, parking, signage, etc). Portion of the funding was approved during the course of this project. The inclusion of toilets is also being considered.



## Key Findings

- Unemployment in Whyalla is higher than the South Australian average;
- Traditional industries (steel making) are at risk;
- There is opportunity to diversify the economy particularly in the aquaculture and tourism sectors;
- Holiday-makers are more inclined to road transportation rather than flying to get to Whyalla; and
- Existing tourism proposals area already being discussed at the local, State and Federal levels.



Source: SWA



## 5. TOURISM MARKET ANALYSIS

This chapter examines data and information obtained from Tourism SA to inform the nature and characteristics of the tourism market in Whyalla. It also includes information provided during the stakeholder engagement process which informed these investigations (refer Section 6).

The importance of the tourism industry to South Australia cannot be underestimated. Tourism currently contributes some \$5.6 billion in tourism expenditure to the South Australian economy<sup>20</sup> and represents some 2.5% of Gross State Product<sup>21</sup>. This figure has been steadily increasing and is expected to increase further in accord with Government policy, initiatives and targets.

The tourism industry provides direct employment opportunities across a broad range of areas suiting personnel with varying skills sets and education levels i.e. spanning drivers, tour guides, travel agents, interpreters, hospitality and marketing and product development staff.

<sup>20</sup> Tourism SA

<sup>21</sup> Tourism Research Australia, State Tourism Satellite Accounts 2013-14

<sup>22</sup> Tourism Research Australia, State and territory tourism forecasts 2015

Tourism Research Australia forecasts have predicted an annual growth of 24% in domestic visitor nights (to 17 million nights) and 65% in international visitor nights (to 3 million nights), outside of Metropolitan Adelaide, over the next ten years in regional South Australia<sup>22</sup>.

In order to inform the a Master Plan for the Northern Coastline, it is important to understand the broader Eyre Peninsula context, as opportunities may exist to capture portion of the wider region's tourist population.

Additionally, and while the majority of this analysis will focus on Whyalla and the Northern Coastline, investigations have also considered the Port Lincoln market. This has been undertaken on the basis that a large proportion of visitors to Port Lincoln and indeed Whyalla are potentially part of a broader "east-west" road trip.

Those visitors to Port Lincoln are therefore a market segment of relevance to Whyalla with it therefore important to understand their characteristics.

### 5.1 Broad Market Trends

A number of visitor and segment trends in South Australia, Australia and internationally represent an opportunity for the Northern Coastline.

#### Aquatic and coastal environment

The aquatic and coastal environment is a key theme which particularly echoes with the image of 'Australia' overseas. International visitors expect to explore marine environments when they visit the country. This theme is a key strategy for Tourism Australia and Tourism SA. It is also a natural expectation for domestic visitors and, in the case of Whyalla, local residents, who enjoy active coastal experiences (boating, kayaking, fishing etc). This also includes divers, who are perpetually looking for new exploring opportunities. It is noted that this theme is likely to be subject to seasonal fluctuations, with two exceptions:

- Fishing - visitors who travel with the primary purpose of fishing, tend to travel all year round, subject to potential fishing closures. In Whyalla, this occurs during snapper closure;

- The particular context of Whyalla, with the presence of the cuttlefish during a short 3-4 months season, in winter, represents a rare opportunity to 'fill in' this seasonal gap, and have a yearly aquatic activity.

It is noted that beach and coastal environments are a key marketing focus for Tourism Australia.

#### Nature-based tourism

Nature-based, sustainable and environment-friendly activities are an increasing sector across all generations.

Visitors, both internationally and Australian visitors, increasingly seek landscape and nature-based activities. This is partly explained with the rise of senior tourism, a segment that enjoys low-impact activities (walking, cycling, bird watching etc).

Domestic and international visitor look for unique views to set up tents or RVs, spend the day, explore. Adventure activities in general is a rising trend, with the recent emergence of adventure parks, ziplines, and other environment-friendly attractions which are an attraction for both visitors and local residents.

## Diving

On a similar note, divers form a limited niche market, noting that snorkelling is a more popular activity which is easier to spread amongst a wider range of potential markets. International diving travellers are known to be high yield visitors who stay for extended periods. Even local divers may stay overnight.

The economic contribution of diving in Australia was estimated at \$4.2b in 2015<sup>23</sup>. While domestic dive tourists stay only a limited time and only slightly longer than non-diving tourists, they spent almost three times as much, with \$2157 per diving trip vs \$762 per other trip.

International dive tourists in Australia spend 30% longer than non-dive tourists, and spend 80% more than non-dive tourists on average (\$4949 vs. \$2765 per trip).

It is noted that a ship wreck may trigger a significant increase in dive-related tourism. Previous research (refer to Table 5.1) undertaken identified the following demands and benefits for various sunk ex-HMAS vessels.

In the case of the ex-HMAS Brisbane, the average spending per diver was estimated at \$878.73 for tourists and \$343.59 for locals<sup>24</sup>.

**Table 5.1: Comparable demand and benefits of ex-HMAS vessel reefs (2015)**

Vessel and Location	Annual Diver Demand <sup>25</sup>	Annual Economic Impact (\$M)
Ex-HMAS Swan	4,000	\$3.5-\$3.8
Ex-HMAS Perth	3,000 (est)	\$3(est)
Ex-HMAS Hobart	4,000	\$3.5
Ex-HMAS Brisbane	5,300	\$4.4+
Ex-HMAS Canberra	7,000	\$5.5-\$6
Ex-HMAS Adelaide	5,000	\$4.5-\$5.5

Source: Proposal for Relocation of the Ex-HMAS Tobruk (II) to Skeleton Bay, Tasmania, as a New Artificial Reef and World-Class Dive Tourism Site

## Food and wine

Food and wine is a major factor influencing holiday destination decisions.

It is noted that food and wine is a key marketing focus for Tourism Australia, as well as for Tourism SA with the Seafood Frontier Strategy. There is therefore potential for food and particularly seafood enthusiasts to become a growing segment. This segment is likely to include higher yield visitors, and year-long visitation.

Supported activities include fishing industries, diving/boating/fishing charter operators, restaurants.

Businesses need to take part in this Strategy and participate in showcasing existing product.

## Cycle tourism

Cycle tourism is an increasingly more popular activity for both domestic and international visitors (from Europe largely), as groups or independent travellers. Cycling may be the primary (pre-planned trip, organised tour, cycling event) or secondary purpose as one of a multiple activities undertaken during a trip (day touring, casual cycling).

In comparison to other tourists, cycle tourists are more likely to stay for an extended period of time and spend more than \$2000 on a trip. Anecdotally, domestic cycle tourists spent over \$213 million in Australia during 2004-2005<sup>26</sup>.

It is noted that 19% of the South Australian population cycles, whether regularly or occasionally, 30% of which are from the AB (Affluent & Educated Audience) quintile<sup>27</sup>.



Source: Tourism SA



A subsection of cycle tourism relates to Mountain Biking.

Mountain bikers include:

- Core mountain bikers (experienced riders who will travel to riding destinations);
- Non-core mountain bikers (families, groups, visitors in search of a different experience); and
- Local mountain bikers, who would regularly ride a mountain bike within a 40km radius of their home.

Non-core and local riders form a broad market. In Whyalla, it is noted that cycling/mountain biking occurs to the top of Hummock Hill, and down to the turn off to Iron Baron. It seems that a new destination for local residents may represent a new opportunity.

Cycle tourism may be improved and/or driven by:

- Appropriate signage;
- Built attractions/historic sites;
- Natural attractions, landscapes, views;
- Information - maps indicating attractions, toilets etc;
- Overnight stay opportunities;

- Variety in trails; and
- Secure infrastructure - bike racks.

### Recreational fishing

Recreational fishing is a major activity, with the Spencer Gulf attracting a large proportion of SA recreational fishers who form a population of approximately 277,000<sup>28</sup>. The value of recreational fishing in SA was estimated at \$148 million in 2011<sup>29</sup>. The cost of a fishing trip is estimated at approximately \$200-250 which may include accommodation, bait and other expenses such as fuel and food<sup>30</sup>.

### Generation Y and social media

'Millenials', otherwise known as Generation Y, form the generation aged between 18 and 30. This segment is likely to be environment aware and cautious. Young travellers seek experiences and adventures in a natural environment. They are likely to use digital media to organise their trip, but also during ('navigate' and 'show to peers') and after their trip ('report back to the community'). Word of mouth is particularly important with this segment<sup>31</sup>.

As stated by Tourism Australia, social media is increasingly affecting the way Australians travel domestically:

*"A significant number of the 10 million Australians on Facebook make travel decisions based on their friends' social media activity, with 20 per cent of those surveyed admitting they had booked a domestic holiday as a result of viewing friends' updates, photos and check-ins. More than any other age group, Generation Y was most likely to book a holiday based on the social media activity of friends."<sup>32</sup>*

This was reinforced by leisure operators from Whyalla, who are active on social media and notice changes in visitor numbers based on social media exposure and activity.

### Baby Boomers

Baby boomers are now entering retirement and represent a large segment of active potential holiday makers. This is likely to drive growth in intrastate and interstate visitation, particularly in the recreational vehicle market.

## 5.2 Visitation on the Eyre Peninsula

The Eyre Peninsula is one of the key tourism regions in South Australia and is promoted specifically in relation to sea life, sea food and marine experiences, as 'Australia's seafood frontier', with Whyalla the "Northern gateway" to this region<sup>33</sup>.



Tourism expenditure on the Eyre Peninsula shows a three year average to December 2015 of \$260 million in visitor expenditure. This is expected to increase to \$417 million by 2017 and \$511 million by 2020<sup>34</sup>.

<sup>26</sup> Sustainable Tourism CRC, Cycle Tourism in Australia, An Investigation into its size and scope, 2007

<sup>27</sup> Roy Morgan research

<sup>28</sup> RecFish SA

<sup>29</sup> Ibid.

<sup>30</sup> Victoria State Government, Economic Study of Recreational Fishing in Victoria

<sup>31</sup> Tourism Australia, The Youth Segment

<sup>32</sup> Tourism Australia 2012-2013 Annual Report

<sup>33</sup> Explore Eyre Peninsula

<sup>34</sup> Tourism SA

### 5.2.1 Number of Visitors

As identified by Table 5.1, over the period 2012-2014, the region annually attracted an annual average of approximately 361,000 domestic overnight visitors, which accounts for approximately 7% of the domestic overnight market in SA, and 13,000 international overnight visitors, which accounts for 3.5% of the overnight international market in SA.

It is also noted that 355,000 day-trippers visit the region.

Overnight visitor numbers have not increased since the mid 2000's as researched by TRA. Interstate visits have declined, which is a consequence that can be seen across Australia of both the GFC and the higher value of the Australia dollar which has encouraged Australians to travel overseas.

International visits have remained stable (11,000 in 2002, as shown in the Strategic Infrastructure Plan for SA dated 2005).

**Table 5.1: Eyre Peninsula Visitor Summary**

Visitor Segment	Number of Visitors	Proportion	Nights	Average Length of Stay	Purpose of Visit (% of visits)/ length of stay		
					Holiday	VFR	Other
Intrastate Overnight	273,000	76%	1,107,000	4.1	n/a	n/a	n/a
Interstate Overnight	89,000	25%	437,000	4.9	n/a	n/a	n/a
Domestic Overnight	361,000	97%	1,544,000	4.3	39%/5.2	31%/3.9	32%/3.3
International	13,000	3%	138,000	10.7	78%/4.5	13%/29.1	10%/33.1

Source: Regional Tourism Profile December 2012 - 2014

<sup>35</sup> SA Regional Tourism Satellite Accounts 2013-14

### 5.2.2 Profile of Visitors

Of domestic visitors, approximately 35% are Adelaide-based, and another 40% from elsewhere in South Australia. The region is evidently dependent on the SA market.

With respect to international visitors, the extended length of stay reflects the multi-destination trips.

With specific regard to the domestic market, it is noted that:

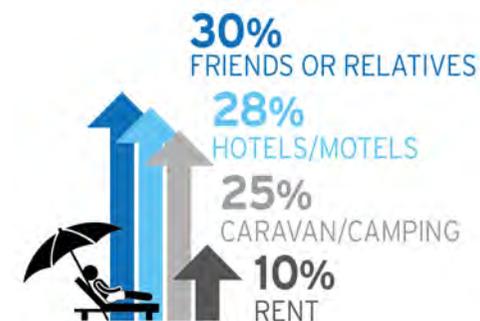
- 30% stay at friends or relatives;
- 28% stay in hotels, motels and the like;
- 25% stay in a caravan/camping park; and
- 10% rent a property.

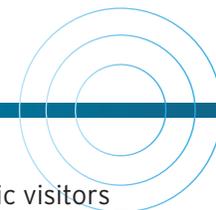
The majority of consumption in the Eyre Peninsula is contributed by domestic overnight visitors who spend the most per night (\$250) on average.

### 5.2.3 Tourism in the Eyre Peninsula and Regional Comparison

Tourism contributes to 9.1% of the Eyre Peninsula's economy, and to 12.4% of its employment, during 2013/14. Comparatively, tourism contributed to 13.3% of the Yorke Peninsula economy, and nearly 18% of its employment in the same period.

Notwithstanding, "from 2006-07 to 2013-14, tourism GVA grew most significantly in Eyre Peninsula (6.7%)<sup>35</sup>", and, considering the recent events in the steel industry, there is potential to grow the importance of tourism in the region. The recent promotional strategies will also support visitation growth.





Further comparison with the Yorke Peninsula suggests that the Eyre Peninsula has a much stronger presence in the interstate and international markets, with nearly three times more interstate overnight visitors and four times more international overnight visitors.

This is presumably explained by:

- the presence of larger cities on the Eyre that drive international and interstate visitation;
- more formalised attractions and activities;
- the fact that the Eyre region act as a gateway to the Nullarbor/WA region that is typically part of international visitors' longer trips; and
- the fact that the Yorke Peninsula is promoted as a family/getaway destination for Adelaide/SA residents.

The self-drive tourism sector is also considered to have potential for future growth<sup>36</sup>.

### 5.3 Visitation in Whyalla

Only limited data is available to understand the existing tourism market in Whyalla. Data has been provided by Tourism SA specifically for this project. Other data used was published by Tourism Research Australia.

#### 5.3.1 Number of Visitors

Visitation to Whyalla over the last 10 years averages 83,000 visitors annually<sup>37</sup>.

- Over this ten-year period, visitation peaked at an annual average 91,000 visitors in 2008, and troughed in 2012 with 75,000 visitors; and
- In September 2015 an annual average of 87,000 visitors was recorded.

It is important to note that these visitation figures include short-term workers and do not reflect visitation in a pure leisure/tourism sense. Anecdotally, short term worker account for a significant proportion of overall visitor nights.

#### 5.3.2 Profile of Visitors

- In the year ending September 2015, Whyalla attracted an estimated annual average of 84,000 domestic overnight visitors, who stayed approximately 308,000 nights;
- There were approximately 3,000 international overnight visitors to Whyalla for year to September 2015, representing 3% of overall visitors.
- On average, domestic overnight visitors to the Whyalla stayed 3.7 nights, on par with the state average of 3.7 nights; and

- Of the total domestic visitors to Whyalla 78% on average are intrastate travellers visiting friends and relatives with 65% of these intrastate visitors from Adelaide.

Based on information provided by Tourism SA and data prepared by Tourism Research Australia (TRA)<sup>38</sup>, there was an increase of 36% in international domestic visitors between 2013 and 2015 (+800 visitors).

**Table 5.2: Visitation to Whyalla - Year Ending September 2015 unless otherwise stated**

Visitor Type	Number of Overnight Visitors	Proportion	Number of Nights	Average Length of Stay	Average Spend per Trip (2014 data)	Average Spend per Night (2014 data)
Intrastate	65,500	78%				
Interstate	18,500	22%				
Total Domestic	84,000	96.6%	308,000	3 nights	\$494	\$142
International	3,000	3.4%	65,700	26 nights	\$773	\$37
Total Overnight	87,000		373,700			

<sup>36</sup> RDA

<sup>37</sup> Figures are reported on year ending September

<sup>38</sup> TRA, Tourism in Local Government Areas 2013 and 2014 Whyalla

Based on similar information, there was an increase of 5% in domestic overnight visitors between 2013 and 2015 (+4,000 visitors).

A summary of Whyalla visitation profile is provided at Table 5.2, based on information provided by Tourism SA, data prepared by TRA, and the results of consultation.

Tourism Research Australia further identified a total of 93,000 day-trippers in 2014. Average spend per day trip was estimated at \$181.

### 5.3.3 Detailed Characteristics

#### International Visitors

A vast majority of international visitors typically have longer stays, with lower spends per night as shown in Table 5.2. This theoretically reflects low-yield travellers staying at lower-end accommodation types, e.g. camping, bush camping or travelling with self-contained residential vehicles.

While international visitors account for 5% of overnight visitors in Port Lincoln, they account for approximately 2.2% in Whyalla (difference of 4,000 visitors). Noting an overall 4% of international visitors in the Eyre Peninsula, it is evident that it is the whole region that is yet to capture the attention of the international travel market.

#### Domestic Visitors

Based on data prepared by TRA, approximately 35-40% of domestic visitors travel to Whyalla to visit friends or relatives (31.5% in Port Lincoln), and 20% for holiday-purposes.

Approximately 35-40% of domestic visitors are in Whyalla for 'business' reasons (24% in Port Lincoln), and are likely to mainly comprise of contract workers.

Approximately 20% of domestic visitors are travelling on their own to Whyalla, and another 20% in a family group. Some 25% are travelling as a couple. It is likely that approximately 30% of visitors are groups or friends or relatives travelling together, which may reflect group business trips.

A majority of domestic visitor nights in Whyalla are spent with friends or relatives (41.5%) and hotels (21%). This is similar in Port Lincoln.

In the absence of data for Whyalla in respect to camping, it is worth noting that 13% of domestic visitor nights in Port Lincoln were spent in commercial camping/caravan park, and 25% in 'other' forms of accommodation. 'Other' forms of accommodation are likely to include rentals and guest houses.

The consultation process described in Section 6 identifies that an average of 82.5% of visitors who responded to the surveys undertaken in order to inform the Master Plan were camping or staying in caravans.

It is evident that the visitor profile in Whyalla is more business/family and less holiday oriented as compared to Port Lincoln.

### Accommodation Nights (Hotels, Motels, Serviced Apartments)<sup>39</sup>

A review of quarterly performances for hotels, motels and serviced apartments has identified key characteristics in relation to seasonality:

- Interestingly, the best performing quarter in Whyalla in terms of number of nights and occupancy rates tends to be the June 'winter' quarter; and
- In terms of takings however, the best performing quarter is the January to March period, where room rates are traditionally increased by operators.

Whyalla seems to be the best performing location in the Eyre Peninsula in terms of room nights occupied, with approximately 37% of room nights occupied in Whyalla compared to 29% in Port Lincoln.

This is explained by the larger number of rooms in Whyalla (358 vs 991 in the Eyre Peninsula). This is further explained by the importance of short-term workers to Whyalla as compared to Port Lincoln.

With respect to expenditure, average takings are generally lower in Whyalla, with Port Lincoln trading some \$35 to \$42 higher per room night occupied.

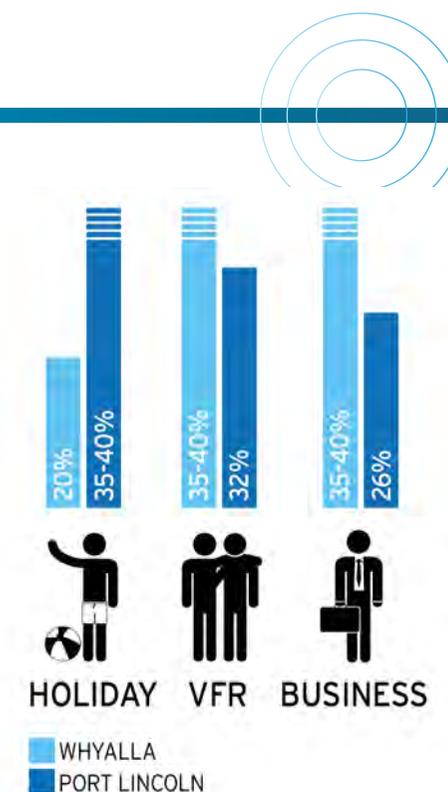
Table 5.3 below provides a comparison between Whyalla and Port Lincoln tourist data, with numbers on the left for Whyalla, numbers on the right for Port Lincoln.

For those staying in commercial accommodation, the average spend per night in 2014 was \$170 in Whyalla, as compared to \$260 in Port Lincoln.

Table 5.4 compares the purpose of visit for domestic visitors. The sample size is too low to provide a similar assessment for international visitors. It is evident that Whyalla has a significantly higher proportion of business visitors and a lower proportion of holiday visitors. Capturing more of this holiday visitor market is a key opportunity for Whyalla.

**Table 5.4: Comparison of Domestic Visitor Type - Whyalla and Port Lincoln**

Domestic Visitor Type	Whyalla	Port Lincoln
Holiday	20%	35-40%
VFR	35-40%	32%
Business	35-40%	26%



**Table 5.3: Comparison of Visitation to Whyalla and Port Lincoln - Year Ending September 2015 unless otherwise stated Whyalla/Port Lincoln**

Visitor Type	Number of Overnight Visitors	Proportion	Number of Nights	Average Length of Stay	Average Spend per Trip (2014 data)	Average Spend per Night (2014 data)
Intrastate	65,500/86,000	78%/70%	n/a	n/a	n/a	n/a
Interstate	18,500/37,000	22%/30%	n/a	n/a	n/a	n/a
Total Domestic	84,000/116,000	96.6%/94%	308,000/439,000	3.7 nights/3.8 nights	\$494/\$692	\$142/\$168
International	3,000/7,000	3.4%/6%	65,700/49,000	25 nights/7 nights	\$773/\$463	\$37/\$60
Total Overnight	87,000/ 123,000		373,700/488,000			

<sup>39</sup> ABS Tourist Accommodation, SA 2014-15

### 5.3.4 Activity Profiles

Popular activities were identified through the survey undertaken with visitors (refer Section 6 for further information).

In general in Whyalla, the Marina/foreshore, the Point Lowly Lighthouse, the Maritime Museum were popular places to visit.

In respect to the Northern Coastline, fishing was identified as the primary activity, followed by, in order of popularity:

- Swimming;
- Boating/fishing;
- Hiking; and
- Crabbing.

#### Attractions in Whyalla

Table 5.5 identifies the annual number of admissions for each key visitor attraction in Whyalla.

It is noted that data for the Visitor Centre includes all interactions, including visitation of the Centre itself, but also any other type of enquiries.

Notwithstanding, it is evident that fewer visitors seek information from the Visitor Centre, before or during their trip, potentially due to new technologies.

#### Accommodation in the Study Area

As previously noted, the cottages at Point Lowly are managed by the Council as temporary accommodation, along with the adjoining camping ground.

The cottages were handed back to Council on 6 January 2015. The cottage can accommodate up to 29 persons. A review of the bookings at the cottages since then indicates an average of four monthly bookings, with groups of a size ranging between two and 30 persons. Approximately 40% of bookings were made by Whyalla-based people for various social or family gatherings. Peak booking is evident in June.

The average length of stay is of approximately 2.9 nights, with peaks of up to 12 nights for fishing groups (interstate visitors). Divers from Adelaide also seem to be aware of the opportunity to stay at the cottages, with a total of 86 visitors during the period (June and July).

Council income generated by the cottages in this period is estimated at an average of approximately \$27,300 (using standard rates, noting different rates for residents, including surcharge).

As for the camping ground, a review of the visitor numbers between March 2015 and June 2016 identifies April/Easter as being the most popular period, with other long weekends also popular times for stays. August is seemingly the least preferred month, with the period from June to August generally less attended, along with December. The length of stay seems to extend over the warmer months, with a peak of 4.8 nights over the Australia Day week. The average length of stay is of approximately 2 nights.

Council income generated by the camping ground in this period is estimated at an average of approximately \$25,000 (incl GST).

**Table 5.5: Annual Admissions to Key Attractions**

	Visitor Information Centre	Maritime Museum	Steelworks
2015	23,962	7,935	2,033
2014	26,416	8,025	2,151
2013	25,128	7,495	1,843
2012	27,658	7,584	1,836
2011	28,453	8,804	1,979
2010	n/a	9,268	1,927

Source: City of Whyalla



## 6. CONSULTATION

### 6.1 Previous Consultation undertaken and results

As noted in the project brief, previous consultation have identified a range of improvements and activities that could occur in the area:

- Several upgraded coastal tracks (including 6km to Fitzgerald bay, reduce several steep inclines and seal);
- More walking trails, integrating different sections of the Point Lowly Peninsula;
- Improvements to existing and the provision of more camping sites;
- Provision of small fishing jetties;
- Lookouts at key locations;
- A cycle/walking trail connecting Whyalla to the northern sections of Point Lowly;
- An upgraded road network, ideally including the sealing of key roads (to Point Douglas);

- Satellite facilities for the proposed Cuttlefish Interpretive Centre;
- Options to encourage the development of additional aquaculture enterprises;
- Caravan park with supporting infrastructure; and
- Coastal living subdivision at False Bay and/or Southern Fitzgerald Bay.

### 6.2 Master Plan Consultation Process & Results

This Master Plan is further supported by data collected via the following consultation processes:

- Direct stakeholder consultation;
- Preliminary survey at the Visitor Centre and Point Lowly;
- Online visitor and resident surveys; and
- Community Open Day.

Due to the sample size the results from the surveys are potentially statistically biased. Therefore the results should be used with caution.

#### 6.2.1 Direct Stakeholder Consultation

Key stakeholders were contacted while preparing this Master Plan, from the following sectors:

- Federal and State government department and agencies;
- Industry, including aquaculture operators;
- Hospitality - Accommodation;
- Leisure operators; and
- Key indigenous and community groups.

#### 6.2.2 Visitor and Resident Surveys

A preliminary survey was conducted during the summer holiday period of January/February 2016. Hard copy survey forms were available at the Point Lowly camp grounds and at the Visitor Information Centre.

A total of 51 responses were received.

A further, more detailed survey was conducted between 7 April and 18 May 2016. Two survey forms were available for either residents or visitors on Council's website. Hard copy survey forms were also available for visitors at the Visitor Information Centre and at Point Lowly camp grounds.

A total of 98 responses were received (56 residents, 42 visitors).

Four survey responses were submitted by international visitors (4% of visitor responses).

### 6.3 Key Findings - Residents

#### 6.3.1 Activities

Those activities that are typically undertaken at least once a month are 4WD and shore/jetty fishing. Boating/fishing is also an activity that is performed once a week by a quarter of respondents.

While most activities are performed less than once a month, a majority of respondents do participate in hiking, cycling, swimming, diving, crabbing.

The Northern Coastline is clearly a destination location for diving, snorkelling, shore/jetty fishing, boating/fishing, crabbing, 4WD and swimming.

Cycling and hiking are two activities that are undertaken less frequently on the Northern Coastline as compared to elsewhere in Whyalla.

Camping was also a common activity.

### **6.3.2 Cuttlefish Experience**

It is noted that nearly 75% of local respondents have never been cuttlefish diving.

It should be noted that all suggested improvements to the cuttlefish experience, as outlined by the survey were positively received.

A viewing platform and seating/picnic tables received the greatest level of support. While the cuttlefish does not represent - at present - a key

interest or a main reason to travel out of Whyalla, it seems to be considered as an opportunity/reason for a day outing for local people, which can be embellished with a picnic, a walk, or other activity in an enjoyable location out of town.

Information and awareness also seems to be a key aspect to improve the cuttlefish experience for locals.

### **6.3.3 Quality of Infrastructure**

The quality of infrastructure on the Northern Coastline was generally assessed as being average to poor, with walking/cycling trails the item with the most "poor" responses.

### **6.3.4 Supply Gaps and Needs**

A majority of respondents (78%) agreed with the statement that more accommodation options should be provided on the Northern Coastline, predominantly in the form of a camping ground (44%) or caravan park (26%).

With particular respect to camping, a majority of suggestions for additional facilities related to the provision of toilets and showers (in some cases, hot showers). Other suggestions related to:

- Waste management - bins;
- Barbecue, particularly in Point Lowly;
- Accessibility, with bitumen roads for an easier access for non-4WD vehicles. It should be noted that accessibility and the quality of roads was an issue for some respondents who are not currently regular visitors of the Northern Coastline;
- Directional/traffic signage and information boards (camping areas, fauna, flora, history of area etc); and
- Boating/fishing facilities related facilities - jetty, pontoons, fish cleaning facilities, as well as an upgrade to the boat ramp.

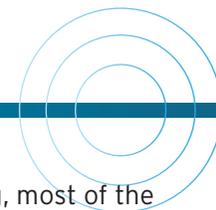
The general sentiment is that the area should be left as natural as can be, with only minor improvements to the camping facilities.

It should be noted that nearly 40% of respondents do not regularly visit the area because of the lack of infrastructure. Nearly 60% of respondents strongly or generally agreed with the proposition of a shop/café in the Study Area.

More than half of the respondents (53%) strongly agreed that more cycling trails should be established, within the Study Area.

A larger proportion of respondents (58%) thought that a cycling trail should be established connecting Whyalla and the Study Area.

Respondents generally agreed with the proposition for more events and festivals.



## Open suggestions

The key matters identified in the open feedback question are listed below and confirm previous findings:

- Upgrades to roads;
- Visibility and promotion;
- Need for toilets;
- Running and/or drinking water;
- Café/shop;
- Look-out panoramic locations;
- Walking and cycling/bushwalking trails within the Study Area and connecting back to Whyalla; and
- Upgrade to boat ramp.

## 6.4 Key Findings - Visitors - Preliminary Survey

### 6.4.1 Profile of Visitor Respondents

A majority of respondents (70%) were from interstate (all states represented), travelling in groups of 2 persons, predominantly above 50/60 years of age.

The majority of respondents were on self-organised holidays, with Whyalla only a stop over during a longer trip for 75% of visitors.

Approximately 20% were on their way to Port Lincoln. Approximately 90% were camping/caravanning during their stay.

### 6.4.2 Activities

Fishing was identified as the most popular activity for the respondents.

For those who had not been to the Northern Coastline, “lack of time” was the key reason, followed by lack of information. Most respondents knew about Whyalla through word of mouth (approximately 20%).

### 6.4.3 Cuttlefish Experience

Some respondents suggested that more information be provided about the cuttlefish, including at a national level. Some also suggested that they would have liked to have experienced the cuttlefish.

### 6.4.4 Quality of Infrastructure

Most of the existing infrastructure was considered to be in “good” condition.

Signage however was described as being an issue (both directional and informational), in the Study Area and also on the main highway.

Some respondents also mentioned the quality of roads along the coast. It was seen as a reason for visitors not to visit the Study Area (damage to vehicles).

### 6.4.5 Supply Gaps and Needs

Approximately 30% of respondents did not think it was necessary to establish a food/beverage outlet, noting that nearly half of total respondents did not respond to this question.

Signage, particularly on main roads, but also in the Study Area and in the Whyalla centre, was identified as requiring significant improvement.

In relation to camping, most of the suggestions were as follows:

- Water, showers, toilets;
- Shade (shelters or trees);
- Barbecue area, particularly at Point Lowly camp ground; and
- Rubbish bins (in some cases recycling bins).

## 6.5 Key Findings - Visitors - Online Survey

### 6.5.1 Profile of visitor respondents

A majority of visitors were from interstate (WA, QLD, NSW, VIC, and Tasmania).

Nearly 70% of respondents were travelling in a group or family of 2 persons, with approximately 25% travelling as a group or family of 3 or 4.

A large proportion of respondents were between 60 and 69 years of age.

75% of respondents were in Whyalla/ Northern Coastline as part of a longer trip to multiple destinations. Approximately 12.5% were on a holiday in Whyalla only, and only 5% were visiting friends and relatives.

The length of stay varied, with a majority of respondents staying 3 nights or more.

60% respondents travelled to Whyalla with a mobile home or caravan, and 40% by private car. As expected, a majority of respondents were staying/ stayed on a camping ground (72.5%).

Over 80% thought the quality of the accommodation was good (52.5%) or excellent (30%).

None of the respondents were travelling with an organised tour group.

Word of mouth was the principal source of awareness/information for visitors, followed by Internet searches (more particularly wiki camps) or camp guide books.

### 6.5.2 Activities

The two most popular activities were visiting the foreshore/marina, and the Point Lowly lighthouse, which respectively approximately 51% of respondents visited.

The Maritime Museum, Fitzgerald Bay and the Visitor Information Centre received similar levels of responses (between 30 and 35%).

The most popular activities on the Northern Coastline, in order of popularity, were:

- Shore/jetty fishing (83%);
- Swimming (64%);
- Boating/fishing (60%);
- Hiking (58%); and
- Crabbing (50%).

Other activities (diving, snorkelling, cuttlefish diving, cycling, 4WD) were selected by less than 50% of respondents.

### 6.5.3 Cuttlefish Experience

Only a minority of respondents had experienced the cuttlefish.

Therefore, whilst the majority of respondents to this question considered a viewing platform to be desirable to enhance the cuttlefish experience, this reflects the opinion of a non-diving market, which would not require the use of a platform. Potential therefore exists to respond to the non-diving market and to capture the interest of a broader market segment.

The survey identified that little information existed about the cuttlefish.

A glass bottom boat was also suggested, to assist in viewing the cuttlefish.

Overall, it seems that “viewing” opportunities would potentially reach a wider market than solely the diving market.

The fact that other facilities were not by any of the respondents reflects a non-diving market. Targetted consultation was required to identify requirements to improve the cuttlefish diving experience (refer 6.1).

### 6.5.4 Quality of Infrastructure

Overall the quality of existing infrastructure was assessed predominantly as ‘good’ (average of 54%). Notwithstanding, all infrastructure received significantly more ‘average’ responses than ‘excellent’ responses.

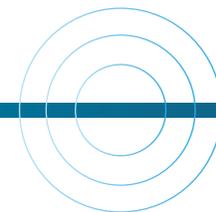
Roads ranked as the ‘best quality’ infrastructure, with 74% of satisfied responses (64% good, 10% excellent).

Rest stations and walking/cycling trails were two elements with the lowest levels of satisfaction.

### 6.5.5 Supply Gaps and Needs

Approximately 55% of respondents highlighted the need for additional accommodation infrastructure on the Northern Coastline, predominantly in the form of camping grounds, noting 10% of respondents suggested a bed and breakfast option.

A majority of respondents also agreed with the need for a shop/café to be provided on the Northern Coastline, with nearly a third “strongly” agreeing with this concept.



Similarly, a majority of respondents identified the need for more cycling trails, noting that cycling was an activity for only 10% of respondents. A similar proportion of respondents were “unsure” about the need to create a cycling trail between Whyalla and the Study Area.

No respondent disagreed with the proposition for more events and festivals to be organised on the Northern Coastline, however 40% were “not sure”.

In summary, all suggestions for additional infrastructure/facilities received general support.

### Open suggestions

The open question at the end of the survey highlighted a need for more and clearer signage (both information and directional).

Respondents were generally satisfied with the camping grounds as they were, with only minor additions needed. Running water (presumably at Fitzgerald Bay), hot showers (with the opportunity to be coin operated), BBQ facilities and dump points/rubbish collection points were the most popular suggestions.

Respondents seemed to be generally open to paying a small fee to use low level facilities (showers and/or toilets). More structured facilities (e.g. playground) were considered unnecessary, but food/café facility was suggested a few times (seasonal/temporary in some instances).

### Key Findings

- The Northern Coastline is a destination location for Whyalla residents, with a range of recreational pursuits undertaken;
- Residents would support and potentially utilise improved accommodation options, but of a form which maintains the natural character of area;
- A shop/cafe and improved cycling facilities were also supported by residents;
- Most visitors were from interstate, were couples aged 50 years or over, and were visiting the region as part of a longer journey;
- The majority of visitors stay 3 or more nights;
- Fishing and marine based activities were the most popular for visitors;
- The need for improvements to a common range of facilities were identified by various stakeholder groups; and
- The cuttlefish experience is seen as a key opportunity of interest to many respondents.

## 7. AUDIT OF EXISTING FACILITIES

An audit of existing tourism and recreation was conducted by landscape architects Oxigen. This audit involved a review of existing infrastructure and facilities and the identification of potential opportunities for upgrades or improvements. The audit examined campsites, hard facilities/landmarks (Lighthouse, Cottages, Boat ramp, toilets facilities), infrastructure, car parking areas and signage.

The detailed audit is provided at Appendix 1.

The audit insides the present condition of existing facilities and structures. Other sections of this Master Plan describe upgrade/improvement works that are being undertaken or that are proposed/recommended in the area.



### 7.1 Key Infrastructure

#### *Campsites*

Camp sites in the Study Area include:

- Point Lowly camp ground;
- Bush camping along the coastline between Point Lowly and Fitzgerald Bay;
- Fitzgerald Bay RV camp area; and
- Fitzgerald Bay camp ground.

In Fitzgerald Bay, while it is understood that the area's key quality is its remoteness and isolated landscapes, minor upgrades would assist to improve the general amenity visitors' experience.

At Point Lowly, basic infrastructure such as picnic tables, bins, a toilet/shower block, and playground, which are all generally of moderate condition.

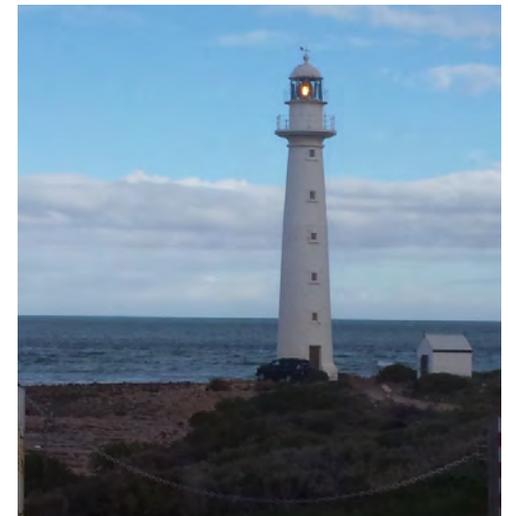


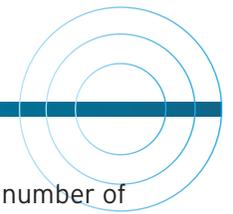
#### *Facilities/Landmarks*

Some more recent facilities such as the boat ramp is considered to be in good condition.

Issues constraints exist in relation to the Lighthouse and Cottages at Point Lowly:

- Internal access to the Lighthouse is restricted to the public, although it is promoted as an iconic landmark;
- The Cottages are in relatively poor condition.





### Diving Site

The cuttlefish dive site is subject to a number of locational and amenity issues including:

- Views to the adjacent Santos site and jetty undermine the otherwise pleasant aspect;
- A lack of basic infrastructure (no toilets, change room, etc);
- General access to the site including directional signage and car parking; and
- Information signage would be improved.

### Freycinet Trail

A general upgrade of the Freycinet trail would also be of benefit, including start and finish infrastructure.



### Car Parking

In general existing car parking areas meet the demand.

### Signage

Signage around the Study Area is generally in moderate to poor condition, with old and/or inconsistent design, and could be upgraded or replaced.

### Vegetation

It is noted that the poor condition of some of the infrastructure is due to lack of three cover/protection against winds. Some of the existing vegetation is also of poor quality.

The audit identified a number of assets where upgrades are considered important, potential prioritisation of the upgrades has also been identified.

Considered to be of a high priority are listed below:

- Point Lowly Cottages: these are iconic buildings in the local area and represent an immediate opportunity for tourism related uses;
- Diving Site located between Black Point and Stony Point: such could be improved in terms of visibility, accessibility, amenity, to provide an enhanced diving experience;
- Signage, generally within the Study Area but more specifically in Point Lowly: directional, informational, interpretive signage could be replaced and further developed.

## 8. SWOT ANALYSIS

### 8.1 Strengths

Identified strengths of the Study Area are as follows:

- Existing nodes:
  - » Point Lowly with basic infrastructure facilities, landmarks, attractions, connections; and
  - » Fitzgerald Bay with limited facilities, yet remote and idyllic setting.
- Natural assets:
  - » Landscapes;
  - » Unique panoramic views;
  - » Fauna and flora; and
  - » Isolation and peaceful environment.
- The area benefits from the significance of an internationally recognised cuttlefish breeding area. This already attracts visitor activity, particularly in winter, which is a traditionally less popular period. Potential growth in visitation could occur through marketing and infrastructure provision.
- The existence of niche markets who are aware of and visit the Whyalla region in order to undertake:
  - » Diving, including cuttlefish divers/researchers;
  - » Four wheel driving; and
  - » Fishing.
- Existing infrastructure, which whilst is basic in most instances forms a platform for future development and improvement;
- Existing visitors are primarily self-driven, are therefore dynamic and able to move around the region (i.e. from Whyalla to study area);
- Other leisure facilities in Whyalla (VIC, HMAS, Steel Works, golf course) contribute to the general offering in the region;
- The area is recognised as a destination on wikicamps, together with other similar on and off-line information tools;

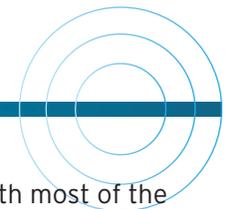
- Being located within the Eyre Peninsula and the seafood/water based attractions for which the region is renowned;
- Aquaculture industry stakeholders seek to resume activities at Fitzgerald Bay; and
- Strong community support for the region and environmental assets, with perpetual work and suggestions to protect the coastline, such as<sup>40</sup>:
  - » Protection of the shingle beach ridges;
  - » Establishment of fences at entry points of tracks to prevent unwanted vehicles (4WD, bikes);

- » Definition of walking trails;
- » Construction of parking bays; and
- » Establishment of signage to prevent access, damage to vegetation, etc.



Photo's courtesy of Cultana Jenkins Shackowners Association

<sup>40</sup> The Whyalla City Council, Eyre Peninsula NRM Board and Conservation Volunteers have provided assistance and funding to some of these improvement projects



## 8.2 Weaknesses

Identified weaknesses to the development and growth of the Study Area are as follows:

- Low awareness of Whyalla region in general, and in particular the Study Area;
- Poor signage, both in terms of quantity and location, and quality/maintenance;
- Poor quality of roads;
- The lookout is not frequented (lack of awareness, slightly out of the way), and is not 'visitor-ready';
- Should visitors travel to Point Lowly, they usually do not go any further (lack of information, visibility, access);
- Lack of designated/recognised tourist drive/route;
- Lack of shade or shelters;

- Strong currents in some areas limiting safe swimming opportunities;
- Interface with Defence land and lack of connection to Port Augusta via coastal road;
- Visitor profile is typically low yield and fully self-contained, with quality of motor homes constantly improving. Contribution to the local economy is therefore not as significant as most other market segments;
- Visitors are attracted to affordability of the existing facilities - any increase in costs needs to be well justified and may take some time to be accepted;
- Access management with a lack of property boundary definition and signage with some RVer/visitors entering private property;
- Restricted public access to a number of areas;
- Impacts of beach driving;
- Distance to Whyalla and inconvenient access;
- Land use zoning, with most of the Lowly Peninsula zoned Industry, and only a narrow strip zoned Coastal Conservation. Few opportunities exist, to develop recreation but also to ensure the conservation and protection of the environment, if such zoning is retained. Should the area be envisaged for economic/tourism/environmental development, it may be necessary to rezone the land;
- Lack of separation distances to existing industries; and
- Existing shipwrecks do not have the potential to create diving opportunities.







- Opportunity for more leisure and recreation activities to occur along the coast and offshore, noting that some experiences are not presently offered in the region, such as a 'swim with the dolphins' trip;
- Investigate opportunities to leverage off the lighthouse and built heritage; and
- Destination-making with key precincts:
  - » Point Lowly: built heritage to promote; existing infrastructure and marina facilities which may be further developed;
  - » Fitzgerald Bay: unique views, secluded environment which should remain as such with only low-key facilities.
  - » Cuttlefish Drive: for a diving experience. Although the main season will be winter, there is potential to promote the marine environment and create year round diving opportunities;
  - » Fitzgerald Bay North: coastal living should remain predominant.

- Opportunities for cycling and walking trails, including mountain biking trails. Joint use with four wheel driving can be investigated in some areas.



Source: The Retiree



Source: 4WD Touring Australia

## 8.4 Threats

Figure 8.2 identifies constraints and threats to the Study Area, which include:

- Potential future industrial developments in the area<sup>41</sup>;
- Previous Army activities and potential risk for unexploded ordnance;
- Risks that land and marine life, especially the cuttlefish, disappears or diminishes, due to known threats (acid sulphate soils, industrial pollution, habitat degradation, rise of sea temperature) or unknown future causes;
- Hazards with potential flooding and rise of sea levels. Across the Spencer Gulf region, sea levels are projected to rise by 18cm by 2030 and 59cm by 2100<sup>42</sup>. This is likely to have impacts on existing coastal habitats of mangroves, samphire wetlands and salt flats;
- Illegal dumping/waste management and marine debris;
- Firewood collection;
- Informal camping may have a range of impacts on fauna and flora, and contribute to soil erosion (particularly 4WD);
- Residential development may also have environmental impacts on soil, vegetation etc;
- Environmental conditions such as weed infestation or erosion (accentuated by wind, vegetation loss) which is worsened by some activities - illegal driving on dunes;
- Informal 4Wdriving/motorbikes/ mountain bikes in inadequate areas;
- Existing primary visitor market may be discouraged from visiting the Northern Coastline if costs are increased.

<sup>41</sup> In relation to the potential future BHP pump station this is unlikely to have impacts on aquaculture should this activity resume at Fitzgerald Bay. In relation to the potential future Flinders Port facility, access to the coastal road leading to Stony Point will remain open to the public once the project becomes operational.

<sup>42</sup> NRM Spencer Eyre Subregional Plan

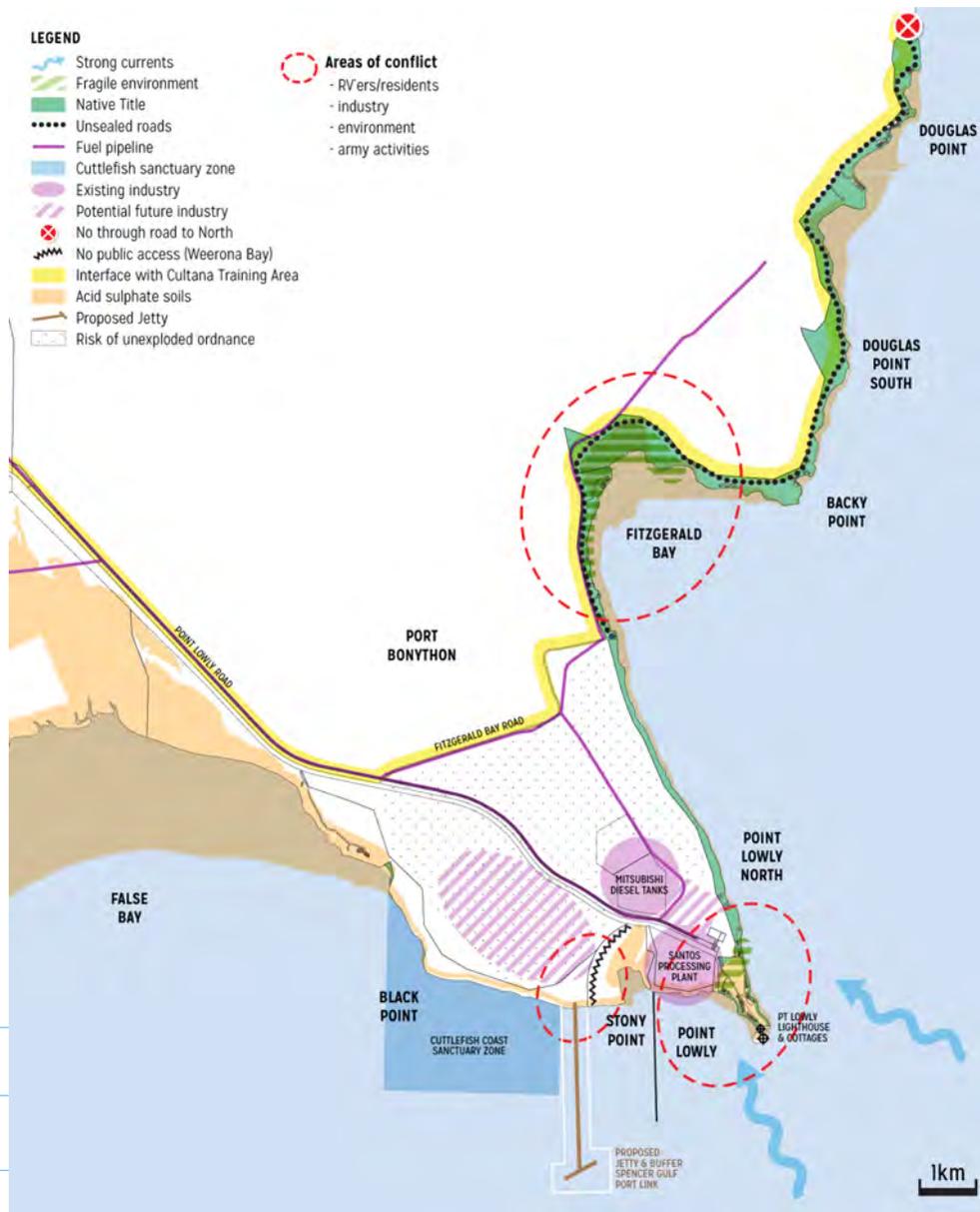


Figure 8.2: Constraints/Threats

# PART B: MASTER PLAN



## 9. MASTER PLAN

### 9.1 Structure & Purpose

The purpose of the Master Plan is to provide the direction and framework for a tourism based economic and sustainable development strategy for the Northern Coastline of Whyalla. It seeks to identify and prioritise future projects and actions to be undertaken in the area by a range of stakeholders.

The Master Plan will evolve and adapt over time, and is intended to initially respond to a 10 to 15 year horizon.

### 9.2 Master Plan Opportunities

The preceding investigations have identified different existing user types who the Northern Coastline in varying ways. It may act as:

- Living environment for shack owners;
- Recreation space for local residents;
- Holiday destination for local residents and visitors; and
- Stopover location for visitors.

The Master Plan has regard to the following considerations:

- Existing physical assets;
- Existing environmental assets;
- existing visitor profile, needs and demands; and
- Potential target markets, noting different economic value associated with different market segments.

It is noted without further major investment, the nature of existing physical assets located within the Northern Coastline Study Area is unlikely to generate significant economic development and growth.

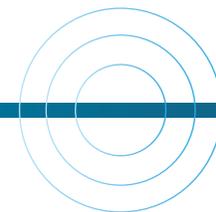
Opportunities exist to leverage off both the existing natural assets and primary physical assets of the Northern Coastline in order to increase the attractiveness of the area to existing markets, together with new market segments. Initial leveraging of these assets should aim to increase visitation and increase length of stay in the Whyalla region, thereby benefitting the existing tourism providers and the general economy of Whyalla.

The following themes and opportunities should be pursued, responding to the competitive advantages and natural assets of the Study Area:

- Nature:
  - » Views;
  - » Cycling/walking trails;
  - » Natural heritage;
  - » Shingle beach ridges; and
  - » Fauna and flora, bird watching.
- Adventure:
  - » Recreational fishing;
  - » Four wheel driving;
  - » Mountain biking; and
  - » Hiking.
- Aquatic:
  - » Cuttlefish - point of difference, uniqueness, international significance, with resonates in leisure/recreation, education, research, film industry etc;
  - » Diving, snorkelling;
  - » Wind surfing;

- » Boating/ off shore fishing;
- » Crabbing; and
- » Dolphin watching/swimming.
- Camping, with a range of users:
  - » RVer's for short or extended periods of time;
  - » Bush campers;
  - » Individuals or groups coming to enjoy the quietness or for a specific purpose (diving being one of them);
  - » Locals from Whyalla.

Other forms of tourist accommodation may also be explored. Point Lowly has two cottages, a lighthouse and camping ground which are, or have the potential to be used for overnight accommodation. The main disadvantage of these assets is their size, in that individually, they are small and hence have limited revenue potential. In addition, they are not located close to a resident population. Therefore activities such as maintenance and cleaning are not easily undertaken. This is likely to result in higher operating costs.



Grouping all these assets may result in the economies of scale required to attract private sector management and investment. Collectively, they could enable an on-site caretaker/manager to operate the facilities. The flow on effect from an on-site presence is the possibility of opening a café and small shop, even if only in peak season.

Current occupancy and revenue potential of the cottages is low. Hence, further development of the sites will require proactive and dynamic management. To encourage private sector investment in Point Lowly, a call for Expressions of Interest to develop, upgrade and manage the facilities may be the best option to identify the nature and extent of private sector interest. This approach will allow the private sector to investigate and potentially undertake viable business ventures tailored to satisfy market demand and expectations. This is preferable to a more definitive call for tenders or Expressions of Interest, which does not allow the private sector to be innovative.

Through targeted immediate investments, it is possible that the Northern Coastline will become a more attractive location, responding to market sectors which may seek to spend both more time and money in the area, therefore supporting the development of additional, facilities, and potentially a new range of accommodation opportunities in the longer term.

### 9.3 Vision

The following vision for the Northern Coastline is proposed, having regard to the opportunities identified.

*'The Northern Coastline will be recognised as a year round destination, valued for its quality environment and recreation experiences. A diverse range of activities will be accommodated that balances the need to maintain the value of the existing natural, cultural and environmental assets whilst adding value to the local economy'.*

The Master Plan seeks to create opportunities for residents and visitors alike to enjoy a diverse range of recreation and tourism experiences based around the unique land and marine assets of the Northern Coastline.

The Northern Coastline should integrate with the wider Whyalla and Eyre Peninsula tourism offer, physically (roads, connections, signage) but also strategically, as part of marketing and promotion initiatives.

The Master Plan seeks to ensure that the Northern Coastline becomes an integral part of the "Whyalla Destination", which does not compete with Whyalla but complements its assets and creates additional opportunities and experiences.

## 9.4 Objectives

For the success of the Master Plan it will be particularly important to:

- Increase and lengthen visitation to the Northern Coastline;
- Ensure the infrastructure and experience satisfies the needs and expectations of visitors;
- Ensure sustainable development and growth;
- Build a complete destination.

The following objectives are designed to facilitate the attainment of the vision for the Northern Coastline. It provides specific expectations in respect to what will be achieved. Associated prioritisation and timeframes are discussed further in the Implementation Plan.

### 9.4.1 Objective 1: Increase and Lengthen Visitation to the Northern Coastline

- Respond to new market opportunities;
- Provide a range of different activities;
- Transform day trips into overnight trips;

- Single night stays to increase to two or more nights;
- Reinforce the area as a recreation asset for the local community;
- Leverage off the existing assets which Whyalla provides. Do not compete with but complement Whyalla as a tourist destination;
- Provide infrastructure and experiences which respond to existing and future market segments.

#### **9.4.2 Objective 2: Ensure the Infrastructure and Experience Satisfies the Needs and Expectations of Visitors**

- Create unique experiences and diversify activities;
- Upgrade existing infrastructure and facilities;
- Facilitate a variety of accommodation and experiences as visitor demand increases, markets diversify and expectations changes;
- Ensure marketing/promotion material highlights the tourism offering and calendar of the region.

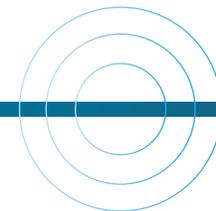
#### **9.4.3 Objective 3: Ensure Year-Round Sustainable Development and Growth**

- Encourage repeat visitation;
- Build a calendar of events which focus on the region, such as an outdoor endurance event eg kayaking, swimming, running and cycling, and fauna/cuttlefish;
- Encourage development which is compatible with the natural and cultural attributes of the area;
- Ensure the Whyalla community continues to enhance and support the coastline as a destination;
- Address existing conflicts (visitor/resident, interface with industry, army, area user/environment).

#### **9.4.4 Objective 4: Build a Complete Destination and Increase Awareness**

- Build on the strengths and competitive advantages in the region;

- Promote the Northern Coastline and Whyalla as a single destination;
- Seek increased the number of tours to the region and expand the focus of the tours such as cycling, kayaking, fishing, cuttlefish, coastal geology, birdwatching, wildlife and vegetation;
- Consider a naming/branding strategy for the Northern Coastline and market accordingly.



## 9.5 Precincts

Four precincts have been identified that are distinct from one another and can support different activities. These precincts can be developed in different yet complementing ways.

### 9.5.1 Cuttlefish Coast (1)

#### Diving Infrastructure

Having regard to likely future industrial development, it is desirable to relocate the existing diving infrastructure further to the west, in order to improve the general diving experience and minimise any nuisance arising from industrial activity.

The diving experience should also be improved with enhanced infrastructure, noting that a number of initiatives are already being undertaken (road upgrade, funding sought for improvements to the diving infrastructure).

Such actions should improve the diving/interpretive experience and therefore attract additional visitors to the area. Proposed initiatives are shown on the concept plan provided as Figure 9.1.

1 Cuttlefish Coast	Initiatives
1.1 Diving related infrastructure	1.1.1 Relocation of the existing ramp/proposed shelter further to the west
	1.1.2 Establishment of a viewing platform
	1.1.3 Establish a boat mooring facility
	1.1.4 Investigate opportunities for tourism operators to service the area (ie a glass bottom boat)

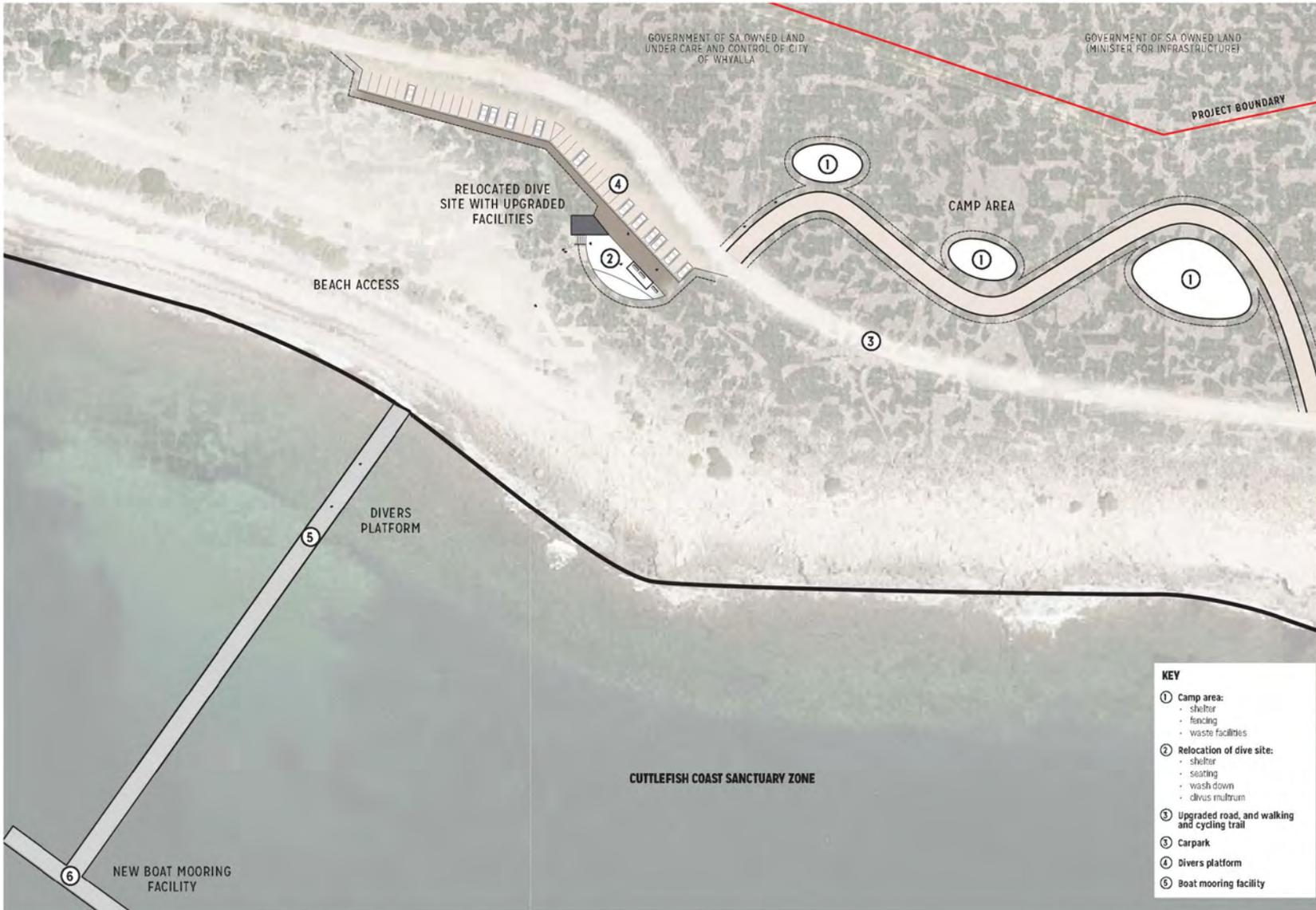
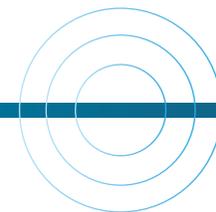


Figure 9.1: Diving Experience



## Black Point

Further west, adjacent Black Point, fishing is authorised within the Sanctuary Zone. Opportunities exist to enhance this popular snapper and whiting fishing area and to provide additional infrastructure to support a day trip. This could include seating and tables, barbecue facilities, fish cleaning facilities, and associated car parking.

Figure 9.2 provides an overview of the Cuttlefish Coast precinct.

Camping opportunities could be explored at the diving site in order to create an integrated experience.

This area could also be a central point for the future organisation of events, such as a Cuttlefish Festival.

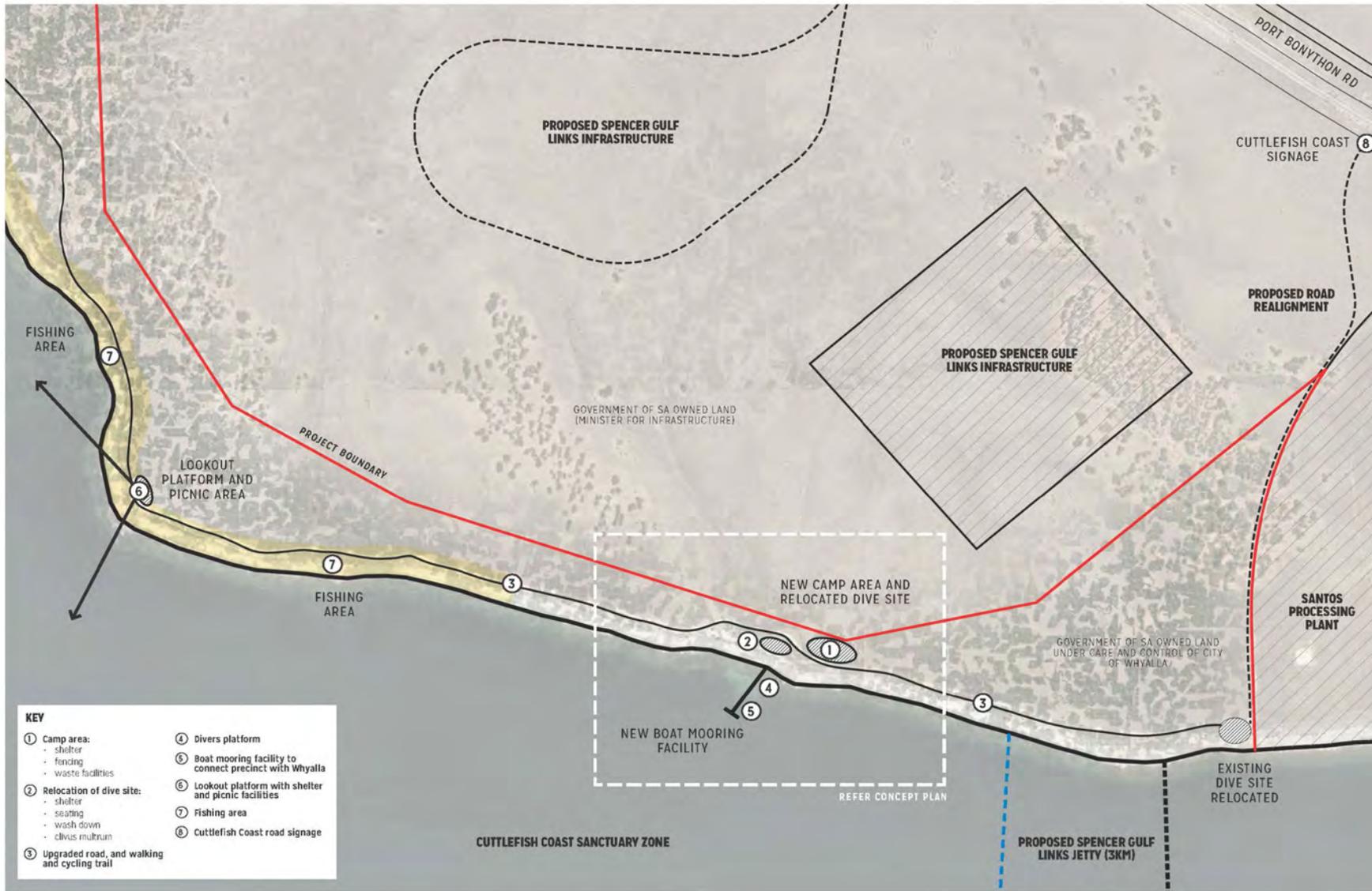
1 Cuttlefish Coast	Initiatives
1.2 Black Point	1.2.1 Progress concept design of a recreation precinct associated with fishing activity, including the creation of a lookout, picnic/bbq facilities, fish cleaning area, shelter and public amenities together with car parking facilities
	1.2.2 Improve and control access to water via boardwalk

1 Cuttlefish Coast	Initiatives
1.3 Accommodation	1.3.1 Establish camp ground near diving site in association with diving infrastructure
	1.3.2 In the longer term consider establish camp ground at Black Point in association with recreation precinct

1 Cuttlefish Coast	Initiatives
1.4 Signage	1.4.1 Relocate and upgrade existing cuttlefish signage at Stony Point
	1.4.2 Enhance interpretative signage in respect to cuttlefish - integrate with any maritime interpretation within Whyalla
	1.4.3 Improve directional signage



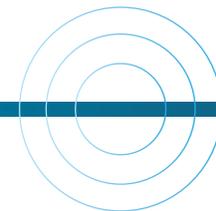
Source: City of Marion



oxygen WHYALLA NORTH COASTLINE CONCEPT | CUTTLEFISH COAST PRECINCT PLAN

0 50 150 250m PROJECT NO. 16.005 DATE 22.07.16

Figure 9.2: Cuttlefish Coast



### 9.5.2 Point Lowly (2)

#### Point Lowly Road

The termination of Point Lowly Road does not provide a sense of arrival, which could be enhanced through the establishment of basic additional infrastructure such as seating, shelter, signage, car parking, and landscaping in order to represent and celebrate a destination location.

#### Accommodation

While it is a landmark building, the lighthouse is not internally accessible to the public. A business case which identifies the potential to open the lighthouse to the public should be undertaken. In addition, consideration of using the lighthouse for boutique accommodation should be explored.

The cottages are an important asset and opportunity to attract for private sector investment. They could, for example:

- Be enhanced for continued use for group style accommodation;

- Operate as independent units but with a shared upgraded kitchen;
- Function as fully self-contained units;
- Operate as bed-and-breakfast/ catered units;
- Be used in whole or part to support local arts/crafts/cafe and interpretation.

The land located north of Point Lowly Road presently contains the Point Lowly camp ground and associated facilities (playground, toilets, showers).



Source: Sugarloaf Point Lighthouse

A large section of the land is also presently undeveloped. While portion of this land could be revegetated, there is potential to expand the existing camping ground and potentially diversify accommodation options (camp sites, cabins).

2 Point Lowly	Initiatives
2.1 End of Point Lowly Road - sense of arrival treatment	2.1.1 Improve the 'welcome'/'sense of arrival' feel, with landscaping, directional and information signage about other precincts, activities etc
	2.1.2 Enhance start of Freycinet Trail

2 Point Lowly	Initiatives
2.2 Accommodation	2.2.1 Lighthouse and Cottages - EOI for redevelopment (potentially including the camping ground), potentially including cafe/shop/museum/crafts
	2.2.2 Expand Point Lowly camp ground and investigate opportunities to diversify accommodation options
	2.2.3 Increase current booking fees and reinvest proceeds

## Recreation precinct

The open area adjacent to the lighthouse, should remain relatively natural. However, minor upgrades (seating, shelter, signage) could be established.

A transition between the 'built up' area and a more natural/revegetation area in the form of a 'nature play' environment could be established. This could comprise low maintenance play elements made of natural and sustainable material. In the longer term, should the nature-play environment prove popular, could be further expanded.

## Management of the environment

It will be important to retain the area that is presently subject to revegetation management and also identify further opportunities for revegetation.

Formalising and managing public access to the sandy beaches (the only occurrences in the Study Area) should be further investigated.

## Signage

At the termination of Point Lowly Road, improved signage is recommended to celebrate and interpret the area, its history and heritage, but also provide direction to other precincts and range of activities within the Northern Coastline, including the start of the Freycinet Trail.

Figure 9.3 provides an overview of the Point Lowly precinct.

2 Point Lowly	Initiatives
2.3 Recreation precinct	2.3.1 Within the camping/accommodation area, redevelop and expand the existing playground into a Nature Play environment for a range of ages
	2.3.2 Behind the lighthouse, redefine existing trails, minor infrastructure additions (seating, shelter), and create a new lookout opportunity

2 Point Lowly	Initiatives
2.4 Management of the environment	2.4.1 Continue and monitor the revegetation work undertaken by Green Corps. Additional areas could be identified.
	2.4.2 Improve and control public access to sandy beaches
	2.4.3 Enhance landscaping in the area

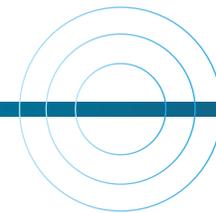
2 Point Lowly	Initiatives
2.5 Signage	2.5.1 Information/directional signage end of Point Lowly Road and camping area
	2.5.2 Start Freycinet Trail
	2.5.3 Inform of revegetation



Source: Coastal Leader



Source: Weekend Notes



- KEY**
- ① Lighthouse:
    - investigate opportunities for accommodation/upgrade
    - lookout
    - seating
    - event space
  - ② Cottages:
    - investigate upgrade - accommodation
  - ③ Pt Lowly entrance:
    - picnic facilities
    - landscaping
    - wayfinding and historic signage
  - ④ New camp area:
    - shelter
    - fencing
    - waste facilities
  - ⑤ Upgrade to Freycinet Trail:
    - surface upgrade
    - wayfinding and signage upgrade
  - ⑥ Fenced re-vegetation area with incorporated nature play opportunities
  - ⑦ Upgrade and expansion of Marina camp site / overflow boat and trailer park.
  - ⑧ Enhance public access to sandy beaches
  - ⑨ Residential expansion opportunity
  - ⑩ Possible expansion of existing camp areas - camping and cabins.
  - ⑪ Investigate opportunities for coastal walking trail linking to main trail

oxygen WHYALLA NORTH COASTLINE CONCEPT | PT LOWLY PRECINCT PLAN

0 20 50 100m PROJECT NO. 16.005 DATE 22.07.16

Figure 9.3: Point Lowly Concept Plan

### 9.5.3 Fitzgerald Bay (3)

#### Accommodation

The existing camp site could be formalised and enhanced with upgraded facilities. It was identified during consultation that additional facilities, such as showers, barbecue facilities, firewood, access to drinking water would be of benefit. Dump points have also been requested, at the RV site. Fees to access the facilities or some of the services could be considered.

Basic camping options, with more limited services/facilities, should be retained and a separate area potentially formulated to the north existing shacks.

In the longer term, it could be possible to establish 'glamping' opportunities, such as eco-lodges, in elevated and secluded areas of Fitzgerald Bay.

#### Road/Trail infrastructure

Fitzgerald Bay is the termination of the Freycinet Trail. Basic facilities (seating, drinking water) potentially connecting into the formalised camping area would enhance the visitor experience.

To the east of Gulf View Drive are existing shacks and the shingle beach ridges. It is known that informal four wheel driving and mountain biking occurs in this area. Signage and potentially fencing could be established to manage and prevent this activity. Designated mountain biking areas should be explored.

#### Management of the Environment

In relation to the shingle beach ridges, an application for their inclusion in the SA Heritage Register is being considered by the Heritage Unit of the Department of Environment, Water and Natural Resources (DEWNR). Should this application be successful, additional interpretive signage should be established.

3 Fitzgerald Bay	Initiatives
3.1 Accommodation	3.1.1 Upgrade camping ground and provide additional basic facilities (drinking water, showers, barbeque)
	3.1.2 Minor upgrades of established RV area (water/dump point)
	3.1.3 Increase current booking fees and invest proceeds
	3.1.4 Retain and/or relocate existing bush camping opportunities
	3.1.5 Investigate opportunities for eco-lodges/glamping in elevated and secluded sections
3 Fitzgerald Bay	Initiatives
3.2 Connections	3.2.1 Freycinet Trail - Enhance finish point and link to camping ground
	3.2.2 Gulf View Drive - continue road upgrades
	3.2.3 Prevent four wheel driving from occurring in undesired areas

3 Fitzgerald Bay	Initiatives
3.3 Management of the environment	3.3.1 Monitor the status of the shingle beach ridges application  Should it be approved, further discuss next steps with DEWNR  Should it not be, investigate opportunities for signage and protection

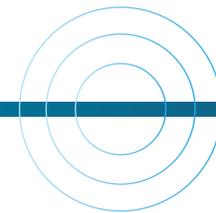


Figure 9.4 provides an overview of the Fitzgerald Bay precinct.

3 Fitzgerald Bay	Initiatives
3.4 Signage	3.4.1 Enhance interpretation of Shingle Beach Ridges
	3.4.2 Generally provide informational signage about the area, wildlife, aquacultur, Defence



Source: Margaretriver.com



Source: Rail trails

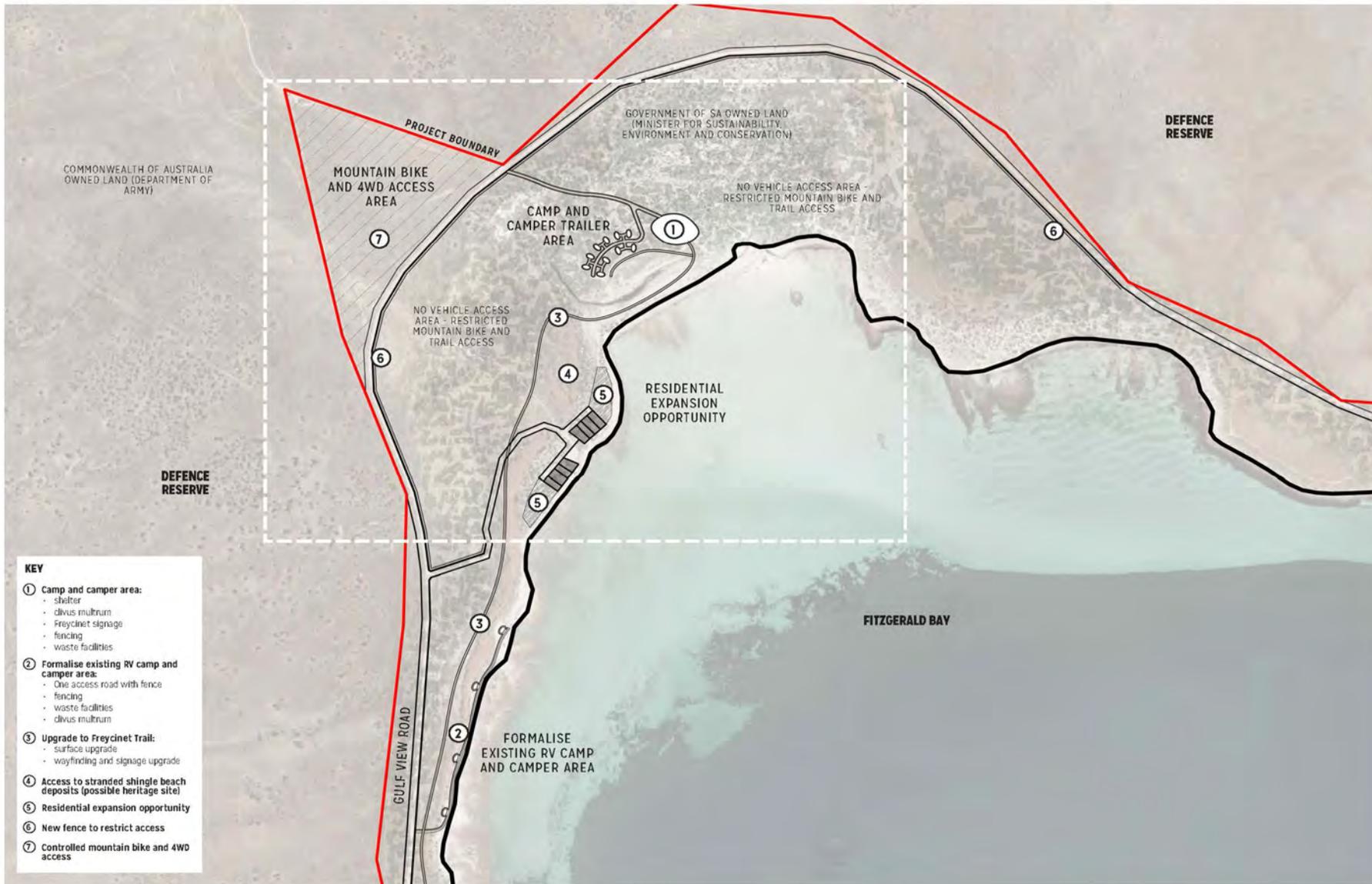
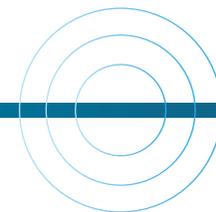


Figure 9.4: Fitzgerald Bay Precinct Plan



### 9.5.4 Douglas Point (4)

Douglas Point is a relatively less accessible area of the Northern Coastline which is, out of the way of the 'things to see and do'. A number of shacks exist here including properties used by permanent residents.

The focus of this area should ensure the amenity of the area for residential purposes is maintained.

The interface with Defence land and activities requires ongoing management and communication minimise the impacts on residents.

### 9.6 Overall Master Plan (5)

Figure 9.5 represents the Master Plan for the whole Study Area. The Plan is also reproduced as Appendix 2. It demonstrates the interrelationship between the precincts and is designed to ensure a co-ordinated approach to development within the area.



Figure 9.5: Whole of Area Master Plan

## Aquaculture development

It has been confirmed during consultation that private operators will in the future seek to resume aquaculture activities at Fitzgerald Bay, in the Aquaculture Zone. Land has been identified north of Point Lowly for land-based infrastructure and the creation of a separate wharf/ramp. Land ownership will need to be secured in negotiation with DEWNR, who currently owns the land.

When aquaculture activities recommence, it would be desirable to encourage new valued added activities which have synergies with the 'seafood' theme and eventually form part of the Seafood Frontier trail.

Potential conflict exists between the aquaculture industry and a proposal by BHP for a desalination plant and a pump station, which is proposed on the same land parcel. Resolution between stakeholders will need to occur in due course and ascertain the compatibility of these developments.

5. Whole of Area	Initiatives
5.1 Aquaculture	5.1.1 Enable recommencement of aquaculture activities - Ensure appropriate zoning
	5.1.2 Secure site for land based facilities & resume activity
	5.1.3 Encourage and develop associated activities to become part of the 'seafood frontier' trail Experiences can include: - Hikes - Off shore fishing excursions - Tastings - Bird/dolphin watching, kayaking etc



Source: Southaustralia.com



Source: exploreeyrepeninsula.com



## Accommodation

A hierarchy of camp sites and potential future forms of accommodation should be established. A variety of accommodation options is desired to respond to the needs of existing/future markets.

Type	Nature and Style	Precinct
<b>Camping</b>		
Basic Camping	Existing bush camping sites, between Point Lowly and Fitzgerald Bay should remain. Minor improvements consisting of firewood and bins, could be provided.	Between Point Lowly and Fitzgerald Bay
	At Black Point, in the longer term, camping facilities could be provided.	Cuttlefish Coast
Mid level camping	The Fitzgerald Bay camp site should remain rustic, with basic amenity to be improved with some additional facilities such as paid shower, firewood, tap, drinking water.	Fitzgerald Bay
	Where the diving infrastructure is being proposed, mid-level camping facilities could be provided for the diving market, potentially integrating with toilet and shower facilities located at the dive area.	Cuttlefish Coast
Camping/caravan park	At Point Lowly, the existing camp ground could be expanded and diversified to include more facilities/amenity and other forms of camping/caravan park type of accommodation (units/cabins for example).	Point Lowly
RV	No further facilities with the exception of a tap and dump point are required within the RV area located at Fitzgerald Bay, given the self-contained nature of RV users.	Fitzgerald Bay
<b>Non-Camping</b>		
Glamping	In the longer term, some 'glamping' forms of accommodation can be explored at Fitzgerald Bay, to attract a higher-spending market which may be spending time in Whyalla but is looking for a few nights out of the town.	Fitzgerald Bay
Type to be investigated	Non-camping forms of accommodation could be explored at the cottages and the lighthouse.	Point Lowly

## Recreation

Four wheel driving already occurs informally in the Study Area, and formal opportunities could be provided for the activity to occur in more managed and controlled manner which minimises impacts on the environment, residents and visitors.

Terrain of interest to four wheel drivers exists between Point Lowly and Fitzgerald Bay, on the western side of the existing coastal road. This is an area where noise and dust will have limited impacts for other users of the Study Area.

5. Whole of Area	Initiatives
5.2 Four wheel driving	5.2.1 Prepare a four wheel driving strategy and establish four wheel driving opportunities along the coast
	5.2.2 Investigate traffic management at Fitzgerald Bay to prevent conflicts with residents and visitors, and environmental assets (shingle beach ridges, beach/erosion)



Source: southaustralia.com

Opportunity also exists for the establishment of dedicated and promoted mountain-biking areas. The primary market for mountain biking typically consists of local residents who may travel up to 40 kilometres from their place of residence. This may also include families and leisure cyclists.

Over time, dedicated tracks may attract more specialised bikers and/or groups from other localities.

5. Whole of Area	Initiatives
5.3 Mountain biking opportunities	5.3.1 Prepare a mountain biking strategy and create mountain biking opportunities



Source: DEWNR



Source: DEWNR



### Year Round Activation

Whyalla benefits from a rare winter asset in the form of the cuttlefish aggregation. As previously discussed, further infrastructure can be established to leverage from and support the cuttlefish theme to increase visitation numbers. Events such as a Cuttlefish Festival may also be considered.

Other potential local/regional events which could attract visitation outside of peak season could include, for example, a grey-nomad forum.

### Connections

It will further be necessary to ensure connections between all precincts in order to create a complete destination that is easy to navigate.

The existing road network is such that it can be upgraded over time to create loops, suitable for scenic driving or cycling and walking. This will create a range of opportunities, itineraries and distances for various levels and skills.

This could include a coastal beach trail at Point Lowly.

The Freycinet trail should be upgraded, with increased amenities and signage. Schools could potentially be involved in the redesign of signs. The existing lookout should also be upgraded and become part of the trail.

A cycling connection to Whyalla could be explored in the medium to long term.

5. Whole of Area	Initiatives
5.4 Year Round Activation	5.4.1 Investigate the business case for a Cuttlefish festival
	5.4.2 Identify local and regional events which may help identify and promote the area
	5.4.3 Should a Marine Centre be developed on the Whyalla foreshore, investigate connections to the Northern Coastline and opportunities for new activities
	5.4.4 Continue advocating for a former HMAS to be sunk at Fitzgerald Bay as an artificial reef
	5.5.5 Continue discussions with Defence to offer opportunities to view training/army activities
	5.5.6 Promote learn to dive opportunities with local operators

5. Whole of Area	Initiatives
5.5 Connections	5.5.1 Upgrade Freycinet Trail with light infrastructure, signage, seating, shelters
	5.5.2 Upgrade Fitzgerald Bay Road and make suitable for walking/cycling
	5.5.3 Create a loop Point Lowly North - Fitzgerald Bay - Point Lowly suitable for scenic driving, walking and cycling
	5.5.4 Create a cycling connection to Whyalla

## Signage

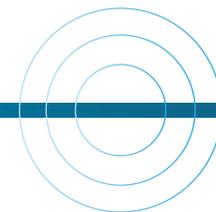
In order to enhance the area as a destination that is easy to navigate a signage strategy will be required in the Study Area and beyond.

New or upgraded signage will therefore be necessary at the following locations, in order to capture the attention of passing traffic:

- Lincoln Highway
  - » Turn off to Study Area (Point Lowly Road);
  - » Lincoln Highway, turn off to Arthur Glennie Road;
  - » Section between Cowell and Whyalla;
- Eyre Highway
  - » Section between Port Augusta and turn off to Iron Knob;
  - » Intersection of the Eyre Highway (turnoff to Iron Knob from Port Augusta); and

- Tod Highway, intersection at Lock (potential to be further investigated).  
The provision of promotional signage in Port Lincoln and Port Augusta could also be investigated.

5. Whole of Area	Initiatives
5.6 Signage	5.6.1 Prepare promotional signage strategy at a local or regional level, to ensure consistency of message.
	5.6.2 Improve regional awareness at the Eyre Peninsula level with signs in appropriate locations (Eyre Highway, Lincoln Highway, Tod Highway)
	5.6.3 Internal signage strategy, including: <ul style="list-style-type: none"> <li>- Informational signage - promote activities, natural and cultural heritage, inform about publicly restricted zones, etc</li> <li>- Directional signage - Internal signage at key turn offs, restricted access, shared uses drivers/cyclists/walkers</li> </ul>



## Marketing and promotion

Awareness of the Northern Coastline and Whyalla could be improved at a regional level, in terms of marketing and promotion.

5. Whole of Area	Initiatives
5.7 Branding and Promotion/ Marketing	5.7.1 Continue the rebranding of Whyalla - Website and raise the profile of the region, with the Northern Coastline a distinct element of it. Explore opportunities to create and promote a new name/brand for the Northern Coastline
	5.7.2 Prepare Tourism Marketing Strategy at a local or regional level
	Prepare annual marketing plans
	5.7.3 Liaise with Tourism SA to continue promotion of the area, link into Seafood Frontier, support events
	5.7.4 Encourage word of mouth - Use social media, organise photo contests etc
	5.7.5 Increase direct business to consumer marketing  Renew collaterals, brochures, promotion materials focusing on key markets (walking/cycling, diving)  Trigger media coverage - PR/media officer  Social media - community management
	5.7.6 Increase direct business to business marketing, day trips/tour operators, brochures/collaterals
	5.7.7 Develop database and liaise with sporting clubs and other interested groups (Uni students for example) at regional, state, national, international level
5.7.8 Promotion at other Visitor Information Centres	

## 10. CONCLUSIONS & IMPLEMENTATION

This Master Plan seeks to provide directions and a framework for a tourism based economic and sustainable development strategy for the Northern Coastline of Whyalla.

It contains a vision and objectives, and a number of initiatives to achieve these objectives. It has further identified precincts which support different activities.

The Northern Coastline's primary attributes revolve around its natural beauty and sense of isolation. It is important that any increase in visitation, either overnight or day trippers, does not destroy the natural attraction of the area. This will require the establishment of infrastructure which does not affect the environment but complements it.

The Northern Coastline is "out of the way" and principally visited by "grey nomads" and local residents who visit the area for nature based activities. A small number of residents are also shack owners, who appear to enjoy the isolation and low intensity visitation.

There is also clear potential to increase visitation from these existing markets. There is also an opportunity to diversify target markets and attract a range of new users to the area, throughout the year.

It is unlikely that a substantial increase in visitation will occur in the short term. Rather visitation can be built up over time. Consequently, in the short term the focus should be on capitalising on the existing attributes of the region and increasing awareness among residents and visitors. This will include relatively low cost capital works which improve amenities and increase access.

Key recommended actions have been identified in Chapter 9. A detailed Implementation Plan is provided at Appendix C, with some 75 initiatives, precinct by precinct.

Potential prioritisation has been identified. Cost estimates will be prepared, noting that funding opportunities may exist to support the implementation of some of the proposed initiatives.

The Master Plan is framed to enable the Whyalla City Council, primarily, and RDAWEP to take leadership in the facilitation of the future development of the Northern Coastline, and to allocate time and resources for its implementation over time.

The Master Plan should be used as a 'live' document which should be reviewed in 5 years to ensure it remains up-to-date.

It is essential that the endorsement and implementation of the recommended actions occurs following consultation with key stakeholders and land owners including the traditional owners of the land.

The actions recommended by the Master Plan may be complemented by other larger scale capital developments, some of which may be located in Whyalla, which complement and integrate with the attributes of the Northern Coastline.

# APPENDIX 1: AUDIT





## APPENDIX 2: MASTER PLAN





# APPENDIX 3: IMPLEMENTATION PLAN

