



INVESTMENT PROSPECTUS



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Image: @bluemediaexmouth

PRESIDENT'S MESSAGE

Welcome to Exmouth and the World Heritage Listed Ningaloo Coast.

We are a relatively young town that was officially opened just over 50 years ago and selected for its strategic location on the tip of the North West Cape. Prior to this, had you stood at Vlaming Head Lighthouse and gazed out towards the Exmouth Gulf you would have seen nothing but a dusty dirt track winding across the flats below. No towers, no town. It was only when the United States was given permission to build the Naval Communications Station Harold E Holt that Exmouth was born. The townsite was proclaimed on 6 December 1963 and construction of the first building commenced in February the next year. The pace of development quickened when the US Navy decided to build its family houses in the town rather than at the Base where single men resided. The Australian Government soon recognised that in order to attract sufficient permanent employees to support the Base it would need to provide quality amenities quickly and liberally. A power station was constructed, bores were sunk and water reticulated around town. Streets were sealed and kerbed, something that was unheard of in the north west at that time. A school, hospital, community hall, library, swimming pool and a host of sporting facilities were built in quick time. Streets underwent a major beautification program and the new town was officially opened on the same day as the Base was commissioned on 16 September 1967.

A lot has happened in the past 50 years. An electric light on one of the VLF towers took over the task of Vlaming Head Lighthouse and the appearance of the majestic whale sharks gave rise to what is now Australia's most consistent and largest annual migration and world leading local industry for in-water tourism interactions with the ocean's largest fish. More than 30,000 people now swim with whale sharks each year with the whale shark industry contributing over \$24 million to the regional economy, attracting international visitors and establishing Exmouth as one of Australia's premier ecotourism and adventure destinations. Our small yet highly resilient community rely heavily upon the annual visitor spend into the local economy. Tourism is now the largest industry in the Shire and continues to grow each year.

Exmouth is the gateway to the World Heritage Listed Ningaloo Coast including the pristine Ningaloo Reef, Australia's largest fringing coral reef, and the rugged and spectacular Cape Range National Park. But the area offers a lot more, being a superior investment opportunity and an ideal place to live and do business. The state of the art Ningaloo Centre Research and Visitor Facility creates exciting opportunities for tourism development, investment, trade and business. Investment potential in our region is vast. A unique combination of bucket list tourism experiences and significant defence and oil and gas infrastructure and services makes Exmouth one of the few places in Australia offering a broad spectrum of development opportunities.

Our Council is a proactive and pro-business local government that is investing heavily in public infrastructure to underpin future commercial development, while taking responsibility of our environmental commitments. Private investment in strategic industries is welcomed and the Shire works closely with investors to explore potential projects and strategic partnerships to capitalise on our towns significant opportunities. We pride ourselves on managing the complex needs of our industrial, commercial and residential communities by providing a regulatory environment that maximises the economic, environmental and social benefits for all involved.

I invite you to contact us to discuss the many investment opportunities on offer, and I look forward to welcoming you.

Matthew Niikkula
Shire President



EXMOUTH by NUMBERS



Estimated RESIDENT
POPULATION 2019
2,871



AVERAGE AGE

36.5



AVERAGE
HOUSEHOLD
INCOME

\$100,435



PROPORTION OF
COUPLES WITH
NO CHILDREN

44%

PROPORTION OF
MIDDLE AGED
(40-59)

30%

PROPORTION OF
ESTABLISHED
COUPLES (25-39)

24%

PROPORTION OF
CHILDREN
(0-14)

20%

MAIN EMPLOYING
INDUSTRY (2016)
ACCOMMODATION

12%



RENTERS 46%



MEDIAN LAND PRICE
\$270,000
(12 months to December 2018)

MEDIAN HOUSE PRICE

\$421,250

MEDIAN WEEKLY RENT

\$463

(12 months to December 2018)



INDICATIVE
GROSS RENTAL
YIELD (HOUSE)

5.7%

277

NUMBER OF
BUSINESSES
(JUNE 2018)



159,900 (2016-2018)

AVERAGE ANNUAL
VISITORS

\$157 AVERAGE SPEND
PER NIGHT
(2017)



ABOUT EXMOUTH

LOCATION

Located 1,270 km north of Perth in Western Australia's Gascoyne region and on the eastern edge of the North West Cape, the town of Exmouth is the centre of the Shire of Exmouth and the northern gateway to the World Heritage listed Ningaloo Coast and the Cape Range National Park. Accessibility to Exmouth by air from Perth is excellent with daily jet services per week and flight times only 1 hour and 50 minutes.

Exmouth is the largest town in the Shire with a resident population of 2,514 people accounting for more than 92% of the Shire's population. With its ready access to the pristine Ningaloo marine environment and the 47,000 hectare Cape Range national park, it is one of the rare remote places in Australia that provides a true 'range to reef' experience.

Exmouth is well known for the world-heritage listed Ningaloo Marine Park, which is the world's largest fringing reef, extending 260 km along the west coast of the North West Cape. The reef has a variety of marine life including whales, whale sharks, dolphins, turtles and manta rays as well as vibrant corals, which can be explored by snorkelling, diving and swimming. The Ningaloo Coast was granted UNESCO World Heritage status in recognition of its outstanding environmental and heritage value. The UNESCO assessment noted that area's superlative natural phenomena, exceptional natural beauty aesthetic as well the importance of its significant natural habitat of biological diversity and inherent science and conservation value.

Cape Range National Park features the stunning Yardi Creek Gorge, 300 metre high limestone plains and more than 700 known caves and coastal woodlands. The Park's rugged beauty provides a stunning contrast to the crystal blue ocean, extensive coral reefs and sandy beaches of the Ningaloo Marine Park. The park has an abundant variety of wildlife including red kangaroos, rock wallabies, euros, emus, 100 bird species, and more than 630 species of wildflower. Visitors can camp at the park, hike through walk trails and experience the beaches surrounding the park.

The Naval Communications Station Harold E Holt is an active Department of Defence operation and an important employer for the permanent residents within the local community. The consistent clear skies and minimal light pollution makes the North West Cape the ideal location for a variety of solar and space observation facilities attracting significant levels of investment into these types of infrastructure.

36km south of Exmouth town is the Learmonth airport. The airport boasts the longest runway in regional Western Australia at just over 3,000 metres in length and is the main point of entry to Exmouth and also provides services including the Shire owned heliport supporting the growing offshore oil and gas operations.





HISTORY

In December 2019 the Gnulli Native Title claim covering some 69,000 square kilometres including the Shire of Exmouth and Ningaloo Coast region was successfully determined. The Ningaloo Coast is part of the Baiyungu, Yinikurtira and Thalanyji peoples' traditional land and sea country and maintains significant cultural values. Working closely with the Department of Biodiversity, Conservation and Attractions these traditional owner groups are managing the conservation and recreation reserves along the spectacular Ningaloo Coast to ensure the area is protected and remains accessible to the public now and into the future.

Exmouth's European history extends back as the early 17th century with Dutch traders landing near to the town's current siting. Australian navigators visited the area in the early 19th century with activity largely limited to small scale pearling and pastoralist operations until World War II when the United States established a submarine base and the North West Cape began to settle.

During the war, the Learmonth Airport was used as a defence base by the Royal Australian Air Force. The Potshot Base, close to the Learmonth Airport, was bombed during the war which started the initial search for oil in the 1950's. The United States Navy began to build the Communication Station in 1963, and four years later the town officially opened in 1967 with the establishment of the Shire of Exmouth separating out from the Shire of Carnarvon.

The Cape Range National Park is situated on the west side of the North West Cape. Created in 1965 the National Park boasts spectacular rugged limestone ranges and 50 kilometres of Australia's best beaches. Whale sharks were first spotted around Ningaloo in the mid 1980s and since this time a vibrant local eco tourism industry has developed around one of the largest, most reliable and best managed whale shark aggregations in the world. An estimated 300-500 whale sharks make their way to Ningaloo annually around the time of the mass coral spawning event and seasonal nutrient upwellings and some 30,000 people swim with these majestic creatures each year.

Exmouth attracts people for its natural amenity, coastal lifestyle and tourism. As a result, Exmouth's demography features a high concentration of young adults and families with young children. Nearly a quarter of residents are aged between 25-39 years with 20% of the population made up of families with young children. Underscoring its reputation as a family friendly town, Exmouth features quality recreational facilities, abundant open space, schools and health facilities.

Exmouth residents enjoy higher incomes than Western Australians as a whole, with household incomes have increased by 21% between 2011 and 2016 reflecting the influence of the resource sector on the employment base.

With 46% of residents renting their dwellings (compared to 29% across WA), Exmouth represents an opportunity for investors to benefit from the relatively high incomes and the high incidence of rental tenure. 85% of Exmouth's workers live and work in the area with a high percentage working in the accommodation and food services industry. A small percentage of Exmouth residents work in neighbouring local government areas in the mining and administrative and support services industry.

Table 1 – Who Lives in the Shire of Exmouth?

	Shire of Exmouth	Western Australia
Population	2,776	2,558,951
Average Household Income	\$100,435	\$98,222
Age 40-59	30%	27%
Age 25-39	24%	22%
Renters	46%	29%
Separate House	86%	79%
Lone Person Households	27%	24%
Couple Family With No Children	44%	39%
Families with Young Children	20%	19%
Labour Force Participation	75%	68%

Source: ABS Census 2016

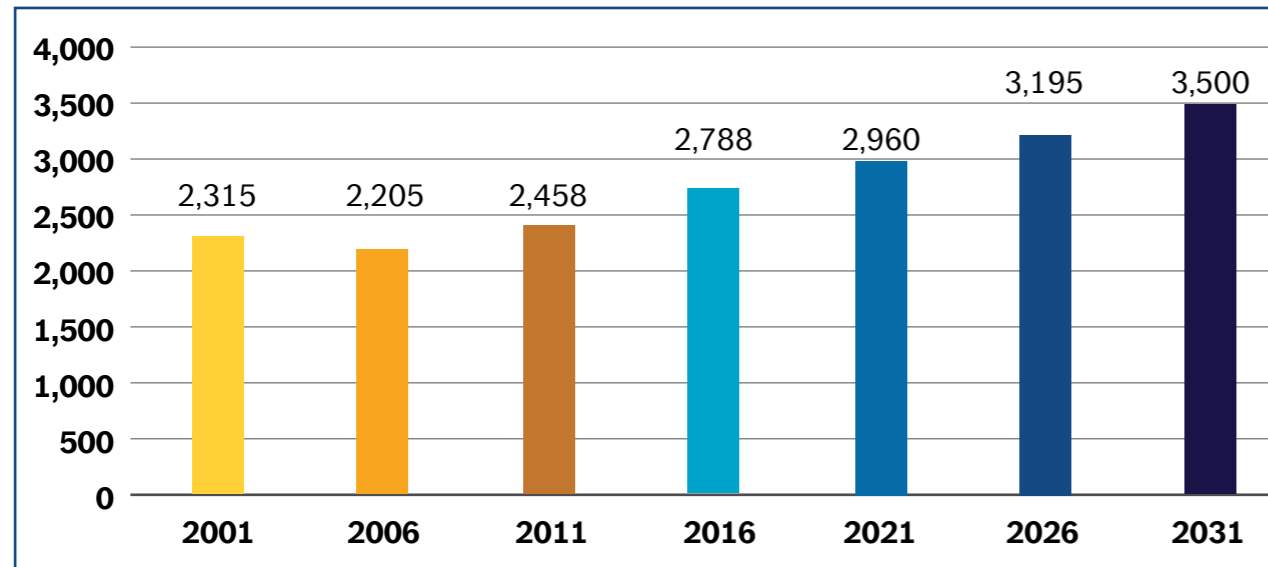
Table 2 – Place of Work

Resident Workforce	1,388
Total Jobs in Area	1,363
Live and Work in Exmouth	1,185
Proportion of Residents that Live and Work in Exmouth	85.3%

Source: ABS Census 2016

The Shire of Exmouth has experienced significant population growth in the past decade to 2019. As at June 2019, the Shire had an estimated resident population of 2,871. Contrasting with other local government areas in the Gascoyne, Exmouth has enjoyed the notable population growth of 26% over the 10 years to 2019. This strong growth is driven by employment in a variety of sectors including oil and gas, hospitality and tourism. Population growth is expected to continue at around 2% per annum with total shire population expected to reach 3,500 by 2031.

Historical and Future Population - Shire of Exmouth

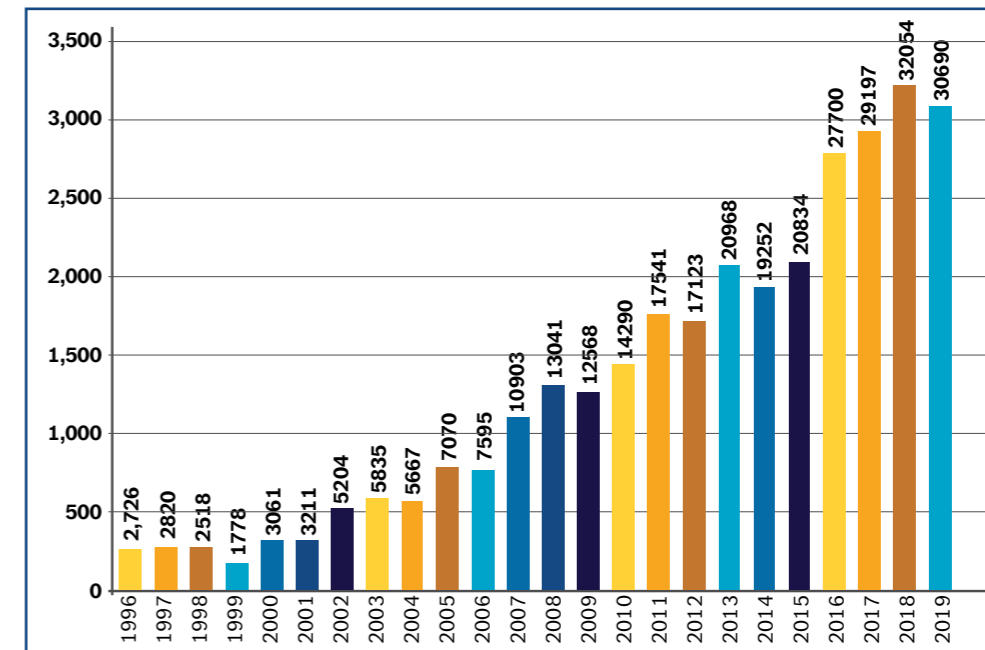


Source: ABS, WA Tomorrow Population Forecasts Band C

Initially the town was founded around the defence industry post World War II, as a result of the significant defence infrastructure developed in the area. However, through development and investment in tourist infrastructure, and increasing awareness and visitor appeal of its outstanding natural assets, tourism is now the largest industry in the Shire.

Along with the stunning natural environment, a key driver for visitor growth to the area is the opportunity to swim with whale sharks. In 2017, more than 29,000 people swam with whale sharks with the whale shark industry contributing \$24 million to the regional economy. Swimming with whale tours is another growth sector of the economy with 215 tours delivered in 2017. The 2011 World Heritage Inscription for the Ningaloo Coast and the global recognition of the areas conservation and environmental value continues to underpin the tourism value of the region.

Whale Shark Interactions - Shire of Exmouth



Source: DBCA Exmouth District Office 2019



Other industries that have significant contribution to Exmouth's local economy, include government services, oil and gas, hospitality and accommodation, logistics and aquaculture.

Major local employers include the Shire of Exmouth; Raytheon Australia; Commonwealth Government Department of Defence; Australian Federal Police; WA State Government Departments of Education, Health, Transport, Police, Fisheries and Biodiversity, Conservation and Attractions.

The largest sectors for employment in the Shire of Exmouth include Accommodation and Food Services and Retail Trade (influenced by the tourism sector) which together account for 24% of the Exmouth workforce. Other key sectors include Construction and Public Administration and Safety with each comprising 11% of the employment in the Shire.

The Greater Enfield Project by Woodside is a US\$1.9 billion investment which is located 60 km offshore Exmouth. The first oil production commenced in mid 2019. Oil from this project is produced through 12 submerged subsea wells connected to the Floating Production Storage and Offloading Ngujima-Yin facility. Production life is expected 10 plus years.

Table 3 – Industry of Employment

	Shire of Exmouth
Industry of Employment	%
Accommodation and Food Services	13%
Retail Trade	11%
Construction	11%
Public Administration and Safety	10%
Transport, postal and warehousing	8.5%
Professional, scientific and technical services	8%

Source: Census 2016

KEY INDUSTRIES

MINING, OIL AND GAS

Western Australia continues to lead the way as Australia's foremost resource investment destination. According to the Office of the Chief Economist (December 2018), committed mining, oil and gas and infrastructure projects in WA have a combined project value of \$18.6 billion, representing 67% of the total value of committed projects across Australia (\$27.9 billion). In addition to committed projects there is further \$82.9 billion in the feasible and publicly announced stages within WA.

Exmouth is well positioned to benefit from the expansion in offshore oil and gas fields, with ongoing resource sector activity providing support for a variety of supply chain activities in resources and marine services. Proximity to offshore oil and gas operations between the Pilbara and the Mid-West mining regions, allows the Shire to support these important contributors to Australia's economy. Although not a mining town, Exmouth plays a valuable industry supporting role and has relationships with the mining sector. The Learmonth RAAF Base and Exmouth Aerodrome, Exmouth provides air transport options for residents and fly-in-fly-out (FIFO) workers for flights between Perth, as well as helicopter transfers to offshore operations. The town also provides supply chain inputs to major projects and oil and gas developments like Woodside's \$10 billion Scarborough project illustrate the importance of the sector to the WA and regional economies. This ongoing investment in regional oil and gas and mining projects provides Exmouth with a sound opportunity to position the community as a key base for essential support services and as an attractive residential location for the regional workforce. These opportunities for economic growth, and the associated downstream population servicing are expected to see the Exmouth community grow into future.

DEFENCE & SPACE

Exmouth is home to major Defence establishments including the Harold E Holt Naval Communication Station, the Learmonth Air Force Base, Space Surveillance Telescope and the Learmonth Solar Observatory. Jointly operated by the Bureau of Meteorology and the US Air force, the Learmonth Observatory is the site of one of six solar velocity imagers in the world-wide Global Oscillation Network Group network operated by the US National Solar Observatory and includes an optical telescope, a low and high frequency radio telescope with three parabolic dish antennae and a solar radio spectrograph. The Space Surveillance Telescope forms part of the US Space Surveillance Network and includes a 270 tonne dome structure that rotates with a similar telescope in New Mexico. The Harold E Holt base is also being explored as a potential link in the US Air Force's Space Fence program designed to track artificial satellites and space debris in orbit around the Earth.

As identified in the Federal Government's \$29.9 billion defence spending program, the Learmonth RAAF base will undergo a \$190 million expansion program out to 2025-26 with a further \$200 million investment to follow in the decade to 2035/36.

The Harold E Holt Facility will undergo a \$200 million upgrade over the period to 2025/26 and a subsequent \$30 million expansion over the decade to 2035 to support enhanced space situational awareness and communication capabilities.

The North West Cape's expanding role in the space and defence sectors means that Exmouth is strategically placed as the key regional population centre to support these projects.





AQUACULTURE

Aquaculture represents a significant opportunity for the region as a result of Exmouth's location in the Gascoyne Coast Bioregion (GCB). The GCB is a Department of Primary Industries and Regional Development defined aquaculture region. As global seafood demand continues to grow, aquaculture is expected to overtake wild capture as the primary source of production.

The GCB has been identified as one of world's eighteen hotspots in for endemic tropical fish species and the second most diverse tropical fish marine environment.

The Exmouth Gulf Prawn Managed Fishery is one of the State's two most valuable commercial fisheries. Similarly, aquaculture also includes the production of pearl oysters. There are several hatcheries that supply pearly to the region's development black pearl farms and a land-based facility near Exmouth is in the process of being modified to operate as a bio-secure hatchery for marine prawns.



HOSPITALITY AND ACCOMMODATION

Hospitality and accommodation support tourism services in Exmouth represents a large portion of the Shire's job market and are a significant driver of the Exmouth economy. In peak seasons between May to August, the Exmouth region operates at almost 100% occupancy. There is an array of accommodation options in Exmouth including hotels, motel, services apartments, hostels, upmarket holiday homes, caravan parks, camping and eco luxury glamping.



CASE STUDY: SAL SALIS

Located on the North West Cape, one hour from Exmouth is the Sal Salis Ningaloo Reef beach safari camp. It is one of 15 eco-luxe wilderness tents that offer views of the surrounding bush, Indian Ocean and Ningaloo Reef.

Visitors can experience various activities such as kayaking, swimming, snorkelling and guided walks.



Exmouth offers a large selection of holiday home options professionally managed by local businesses and collectively offer the greatest number of bed nights to the region. The marina boasts a large number of these short stay accommodation properties offering the ideal Exmouth family holiday experience. Most have private jetties offering direct and hassle free boating access to the Exmouth Gulf and around to Ningaloo Reef. A number of excellent marina development sites, both residential and commercial, are currently available.

Image: Sascha Photography

CASE STUDY: NINGALOO LIGHTHOUSE PROJECT

As part of a revised local development plan for the Vlamingh Head precinct, Tattrang has been granted approval to transform the Ningaloo Lighthouse Caravan Park into a state-of -the-art eco-resort. The \$85 million investment will offer Exmouth needed, modern accommodation option not currently on offer in the town.

The project will create 115 jobs during construction and 140 staff for ongoing operations.



Image: Kerry Hill Architects

CASE STUDY: MANTARAYS RESORT

Mantarays Ningaloo Beach Resort in Exmouth is a 4.5 star resort located at the gateway to the World Heritage listed Ningaloo Reef and Cape Range National Park. The resort includes hotel rooms, apartments and bungalows. The venue can also be used for weddings, conferences and workshops. The resort features a restaurant and bar, swimming pool, gym and private balconies a stage 3 development expansion in the planning stages.

INFRASTRUCTURE INVESTMENT

Significant investment has gone into the development of Exmouth resulting in population growth and increased visitor attraction over recent years. The resident population of Exmouth typically trebles over peak visitor months as seasonal workers are required to service the large influx of holiday and leisure visitors. The town possesses significant accommodation capacity available year round that could be utilised for any workforce required for large scale projects. The Shire is actively seeking partners and delivering infrastructure developments that provide ongoing benefits to residents, businesses and visitors.

COMPLETED INFRASTRUCTURE PROJECTS

A range of resource sector and technology and civil engineering projects, along with significant private sector investment have added to the appeal and liveability of Exmouth over recent years. Some of the projects include:

Van Gogh Infill Project - \$560 million

The Van Gogh field is one of the three subsea oil field developments located in the Exmouth Basin, offshore Western Australia, which tie into the Floating Production, Storage and Offloading vessel, the Ningaloo Vision. The project's capital expenditure was approximately USD\$560 million. Production began in 2010 and produces an average of 40,000 barrels of oil per day.

Greater Enfield - \$1.9 billion

The \$1.9 billion Greater Enfield Project is located 60km offshore Exmouth, within Commonwealth waters. The project involves development of the Laverda Canyon, Norton over Laverda and Cimatti oil accumulations. The first production commenced in 2019 and has a production life of 10 years.

Ningaloo Centre - \$32 million

The \$32 million Ningaloo Centre was opened in 2017. It is a hub for scientific research, housing the Minderoo Exmouth Research laboratory (MERL) and the only marine centre between Perth and Darwin. The centre also comprises the Interpretation Centre which has a 55,000-litre aquarium, visitor galleries, a library and visitor centre and can cater for conferences, functions and events.

Exmouth Boat Harbour Upgrade - \$23 million

The Exmouth Boat Harbour Upgrade project entails upgrade of the service wharf. The Department of Transport is responsible for the Exmouth Boat Harbour and since it was officially opened in 1997, it has been operating at full capacity by maritime industries. As part of the upgrade, new boat pens were constructed, and the existing service wharf was extended. The project costed approximately \$23 million and was completed in late 2017.

Exmouth Marina Village

The marina development was created in the early 2000's and a resort site, 170 canal based residential lots and marine industry across 5 dedicated precincts. Approximately half of the residential lots have undergone construction with a number of residential and commercial development opportunities still available.

Space Surveillance Telescope & C Band Radar

In 2016 the US Defence Advanced Research Projects Agency handed over to the US Airforce Control of the White Sands missile range in New Mexico. This radar which forms part of the US Space Surveillance Network was transformed into a custom facility in Exmouth. Also installed was the C Band Space Surveillance Radar and now fills a gap in the Space Situational Awareness Partnership between Australia and the US. The project has had a positive influence by increasing employment in the town with more than 35 local businesses engaged and approximately 150 residents worked on the site and 12 FTE operations stage jobs.

Learmonth Solar Observatory

The solar observatory opened in 1979 and is located 35 km south of Exmouth. Learmonth was selected due the large amounts of sunshine available and the little radio frequency interference. There is a total of 15 personnel employed on site performing observation, analysis, maintenance and management functions.

Mantarays Ningaloo Beach Resort

The Mantarays Ningaloo Beach Resort is 4.5-star resort which was recently completed. It is located in the Marina Village and is on the doorstep of Sunrise Beach, meters from its waterline. The resort encompasses 68 rooms which ranges from hotel rooms, self-contained apartments and bungalows. The resort features a swimming pool, gym and bar.

Flourishing Oceans - Minderoo Exmouth Research Laboratory (MERL)

The MERL developed by Minderoo Foundation' Flourishing Oceans program is a state-of-the-art marine research hub for studying tropical coastal marine ecosystems in the heart of the UNESCO listed Ningaloo Coast World Heritage site. This is part of Minderoo's commitment to "making Western Australia a hub for world-class marine conservation research, by providing state-of-the-art facilities to Australian and international scientists". The Flourishing Oceans project is co-located at the Ningaloo Centre.



Image: @bluemedi/exmouth

FUTURE INFRASTRUCTURE PROJECTS

Planned investment in industry and hospitality sector infrastructure projects will drive growth in Exmouth's economy and population into the future.

Exmouth Marine Infrastructure

The Shire continues to advocate for a marine infrastructure solution for the visiting cruise ship berthing. The WA State Government and private developers are currently investigating these opportunities. The State Government option is currently in pre-feasibility investigation stage with the objective to provide essential marine infrastructure to enable Exmouth to take advantage of its geographical location and create new business opportunities.

Tantabiddi Boat Landing redevelopment - \$50 million

The popular Tantabiddi Boast Ramp is the main access point to Ningaloo Reef. It is used by thousands of commercial, recreational and research vessels each year, as well as boating fraternity, whale shark operators, government agencies and locals. Planning works for a new boat launching facility is well developed and a cross state government agency initiative.

Town Centre Foreshore Redevelopment Master Plan

The Shire is securing funding for the implementation of its town centre and foreshore master plan. The 2012 plan laid out 22-point revitalisation plan for the town centre and a 16-point plan for the foreshore and open space development plan which together will substantially upgrade the appeal of Exmouth for residents and visitors alike.

Royal Australian Air Force (RAAF) Base Learmonth - \$190 million

The RAAF base in Learmonth will be upgraded to support the RAAF's new strike and air combat capabilities. These upgrades will include planned investment of around \$190 million to improve Learmonth by 2025-26, and an additional approximate of \$200 million in the decade between 2025-26 and 2035-36.

Space Fence

Developed by Lockheed Martin, the second site for the US Air Force Space Fence is expected to be located at the Harold E. Holt base at Exmouth. The Space Fence creates a broad radar fence able to detect objects directly overhead out to 12,000 km as they pass through the coverage region. This includes unusual activity, satellites and space debris. The US \$950 million project is expected to create 300 jobs during the construction phase and a further 30 operations phase jobs in Exmouth.

Scarborough Gas Field - \$5 billion

The Woodside and BHP Billiton Scarborough Gas Field project is located 270 km north-west of Exmouth in the Carnarvon Basin. Decisions about the proposed development is expected to be made by 2020 and the gas field is expected to achieve first gas by 2024.

High Yield Accommodation Projects

A number of up market commercial short stay accommodation projects are currently in planning stages. The \$85m Lighthouse Resort, other investment injection into expansion to existing, and new green field sites will have transformational impact to the local Exmouth tourism and hospitality industries. These projects will significantly expand the current accommodation product offer and attract larger numbers of higher yield holiday and leisure market.

Minilya-Exmouth and Yardie Creek Road Network

The Shire and Department of Transport are working closely to secure major funding for the upgrading of the Minilya to Exmouth, and Yardie Creek roads widening and re-edging.



LIFESTYLE AND AMENITY

Exmouth attracts people for its outstanding coastal lifestyle, stunning natural landscapes and its role as an economic centre and proximity to the major resource sector projects of the Pilbara. The recreation opportunities offered by its superb natural environment, make Exmouth an attractive lifestyle destination for workers and their families. Exmouth is a safe place to live and boasts very little crime. An above average proportion of young families are attracted by the lifestyle and the safe community values. Amenity provision in Exmouth includes the expansion of health care, education services and a wide range of recreation options has helped the Shire's population growth and driven increasing levels of visitation.

HEALTH CARE AND COMMUNITY SERVICES

Within the town there is a complete suite of health services offered to residents. The Exmouth District Hospital provides care for the community and offers services from emergency care, home and community care. It is centrally located, making it easily accessible for all. Services provided by the hospital including pathology, radiography, social work and ultrasonography. Within the town there is a chiropractor, physiotherapist, massage and beauty therapists as well as a pharmacist.

EDUCATION

There are several education facilities in the Shire of Exmouth ranging from childcare to tertiary education.

One Tree Childcare Centre: The childcare centre encompasses 25 places and provides a range of services varying from after school care, day care, kindergarten and preschool.

Exmouth District High School: This public school caters for students from kindergarten to year 12 and serves as the only school in Exmouth. Approximately 430 students are enrolled.

Central Regional TAFE – Exmouth Campus: Courses offered here entail training in art, retail, hospitality, marine, marine, horticulture, information technology, tourism, business administration and education support to name a few. Approximately 250 students are enrolled each year.

The Ningaloo Centre: The state-of-the-art Ningaloo Centre is an incubator for education development and research expansion. Minderoo Foundation's Flourishing Oceans project is focused on developing research facilities in Western Australia to conduct and report scientific-based studies of the human impact on ocean health. Exmouth is a key component in the Flourishing Oceans research program.

RECREATION

Exmouth is largely a nature-based destination with the most popular visitor activities entail marine encounters and outdoor recreation. These include exploring national parks, beaches, fishing, boating, swimming and snorkelling.

Sporting and recreational activities are an important feature of the Exmouth community. The Shire of Exmouth is proud to partner with BHP to build strong and sustainable sporting clubs and community organisations and the Shire is also an active member of the Department of Sport and Recreation's Every Club program.

CASE STUDY: EXMOUTH GAME FISHING CLUB

The Exmouth Game Fishing Club (EGFC) was formed by fishermen in the early 1970's and has grown to a membership of almost 500 people. Anglers can try to target and capture 41 species of gamefish. The EGFC is a non-profit organisation and aims to promote and encourage recreational fishing.

The Shire of Exmouth provides and operates a range of facilities including the recreation centre, undercover hard courts, the Talanjee and Kooboaroo ovals equipped with lighting, pitches and cricket nets. The Exmouth swimming pool is a 50 metre, 6 lane pool and is a tremendous asset to the local community.

COMMUNITY & VOLUNTEERISM

Volunteers make an invaluable contribution to the social, cultural economic and environmental well being of Exmouth. For a town less than 3,000 people, an incredibly strong volunteering culture sees us boast 49 sporting and community groups that make Exmouth a vibrant and supportive place to live.

CLIMATE

Exmouth experiences a dry and warm climate majority throughout the year. With nearly 320 days of sunshine each year, summer daytime temperatures range from the mid to high 30-40 degrees, while a typical winter day reach around 25 degrees Celsius. There is limited rainfall through the year and on average annual rainfall is 230mm, enabling visitors to enjoy great weather all year round.

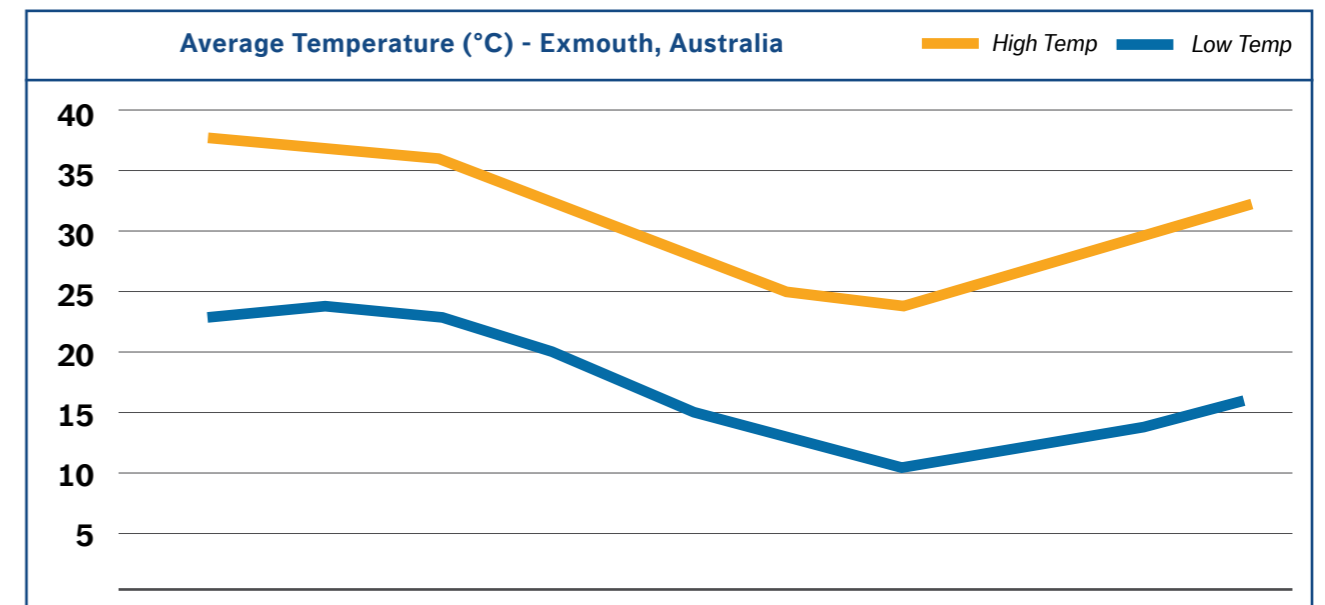




Image: @bluemediaexmouth

CULTURE

Exmouth is a friendly, inclusive, family orientated community with a strong sense of identity and community spirit

A 2018 Community perceptions Survey undertaken by the Shire showed that 80% of residents rated Exmouth as a good or very good place to live and that more than a quarter believed that Exmouth had become a better place to live over the past 12 months.

Residents rated the natural environment, safety and security, the sense of community and the availability of leisure, sport and entertainment as the stand-out liveability factors for the town.

TOURISM AND VISITORS

Tourism is a vital and growing industry for Exmouth and is the town's major economic contributor with eco-tourism experiencing significant growth in recent years. In peak tourist season, the Town's population grows to more than 9,000 attracted by a range of major bucket list experiences.

In the winter months during May to August, the number of visitors arriving to Exmouth is seen to triple the resident population due to the mild weather and clear waters. On average visitors typically tend to stay 7 nights. Exmouth attracts a mix of interstate, intrastate and international visitors for holidays and leisure purposes.

There were approximately 28,000 international visitors on average between 2014 and 2017. Of these the top three international markets where visitors arrived from were Germany, the United Kingdom and United States of America. The average annual visitors over the four years to 2017 equalled to approximately 138,000. Of this 20% were international visitors and 80% domestic. Predicted tourism population based on average annual tourist bed nights and average growth in bed nights rate (Source: Shire of Exmouth, 2018)

Table 4 – Shire of Exmouth Overnight Visitor Summary

2014-2017 Average Annual Visitors	
Estimated Visitors ('000)	
Domestic	110
International	28
Total	138
Estimated Visitor Nights	
Domestic	808
International	158
Total	966
Average Stay (Nights)	
Domestic	7.4
International	5.7
Total	7.0

Source: Tourism Research Australia 2017

2014-2017 Average Annual Visitors

Year	Predicted Residential Population	Predicted Tourism Population	Predicted Total Population
2018	2,836	2,312	5,040
2019	2,870	2,823	5,597
2020	2,905	3,333	6,155
2021	2,960	3,844	6,713
2022	3,006	4,355	7,273
2023	3,052	4,865	7,833
2024	3,099	5,376	8,394
2025	3,147	5,887	8,956
2026	3,195	6,397	9,519

Source: Shire of Exmouth 2018, WA Tomorrow Population Band C

¹ Predicted tourism population based on average annual tourist bed nights and average growth in bed nights rate (Source: Shire of Exmouth, 2018)

MAJOR ATTRACTIONS

Exmouth is an ideal holiday location for locals and tourists and has many attractions ranging from marine life, natural beauty, tours and activities.

Hospitality Services

Exmouth boasts a vibrant hospitality scene with a good number and diverse range of restaurants, cafes, pubs and take-away food services that significantly add to the overall tourism town setting. Awarded the WA 2019 Top Tourism Town status, Exmouth even boasts two successful micro-brewery operations. The Exmouth Council has adopted a highly business friendly approach to its planning and development policies that encourage increased outdoor eating and retailing vibrancy.

Cape Range National Park

Located adjacent to Ningaloo Marine Park, the Cape Range National Park offers spectacular gorges which adjoin the coastline. Once home to the Aboriginal people, the coral coast has witnessed historic expeditions, military activity and maritime industries. The Milyering Discovery Centre is located in the national park, which has visual displays, videos and a small library explaining the Ningaloo Coast World Heritage area to travellers. Visitors can enjoy various activities at the park including camping along the Cape Range coast, bushwalking at the Badjirrajirra Loop Trail and Charles Knife Canyon, and can encounter several native animal species including emus and wallabies.

Ningaloo Marine Park

The World Heritage listed Ningaloo Marine Park stretches along 260km of coastline and ranks seventh on the world's list of coral reef biodiversity hotspots. The reef contains a variety of species including more than 200 corals, 500 fish and 600 different types of molluscs. The region offers the opportunity to encounter whale sharks, manta rays, turtles, dugongs and other marine life.

Visitors here can enjoy several activities including fishing, swimming, snorkelling, surfing and diving. From April to July each year whale sharks migrate to the area, and visitors are able to swim amongst them.

Ningaloo Aquarium and Discovery Centre

Located in Exmouth, on the doorstep to the breathtaking UNESCO World Heritage Listed Ningaloo Coast, the Ningaloo Centre is a state-of-the-art research, education, tourism and community hub. The landmark building is host to first class conference and community spaces and is the ideal gateway to your extraordinary Ningaloo adventure. The impressive Aquarium is a popular attraction for all guests visiting the Ningaloo Centre. The 55,000-litre tank is home to a wide range of marine life local to the Ningaloo Reef including different fish species, invertebrates (like clams and starfish) and corals.

Lighthouse and Lookout Redevelopment

The Vlamingh Head Lighthouse is located 17km north of the Exmouth townsite. The Lighthouse overlooks Lighthouse Bay and has the distinction of being one of the few places in Australia where you can watch the sun rise and set. The Lighthouse was built in 1912 and stands on the northernmost tip of the Cape Range.



Visitors enjoy the magnificent views from the hill, which is a popular spot to watch the sunset, passing humpback whales or for a scenic view of the Ningaloo Reef.

Jurabi Turtle Centre

The Jurabi Turtle Centre houses a range of materials and provides information on turtle biology, threats, conservation measure and the correct way to observe nesting turtles. During the turtle nesting season from November to March, visitors can participate in observation tours.

Beaches

Exmouth offers endless beaches perfect for snorkelling, sunbathing, water sports and fishing. Town Beach is the closest beach to Exmouth's town centre and is an important recreational area for locals and visitors. In addition, there are numerous beaches close by in a 45km radius including Pebble Beach, Bundegi Beach, Mildura Wreck, Dunes Surf Beach, Tantabiddi, Lakeside, Turquoise Bay and Sandy Bay.

Exmouth Boasts Australia's Finest Fishing

With the continental shelf just a handful of kilometers offshore from the outer edge of the Ningaloo Reef, and the vast, shallow Exmouth Gulf offering protection from the open ocean and featuring the largest artificial reef in the Southern Hemisphere, Exmouth and the Ningaloo Coast offers a wide range of fishing environments that are home to a bewildering array of prized game, sport and reef fish. For this reason, Exmouth is internationally regarded as Australia's ultimate fishing destination.

Snorkelling

The Ningaloo Reef provides a number of fantastic snorkelling spots including the famous Turquoise Bay. Visitors are guaranteed to see an abundance of bright corals, fish and stingrays with the occasional turtle and reef shark. Snorkellers may even encounter dugongs and dolphins, as well as whales during the right season between August to October.

Whale Shark Tours

One of the main attractions in Exmouth are the whale sharks that gather in the Ningaloo Marine Park. Every year from March to August, the whale sharks gather here and visitors get a chance to snorkel with these gentle giants. Similarly, Exmouth operators offer in water interactions with Humpback whales and also whale watching tours.

Mountain Biking and Hiking Trails

The Shire is developing a number of recreational trails to improve outdoor recreational opportunities and connections to showcase the area's unique environment and attract visitors.

Cruise Ships

Exmouth is one of eight active WA cruise ship destinations, noting the regional industry contributes \$21 million in direct expenditure to the State economy. Exmouth is an important stop in for cruise ship routes that connect Western Australia, Northern Territory and Indonesia.



INVESTMENT AND BUSINESS OPPORTUNITIES

Through the various sectors and industries in Exmouth including tourism, renewable energy, oil and gas, international research and science to name a few, it presents investment and business opportunities.

TOURISM OPPORTUNITIES

Exmouth is a prime regional tourist destination and is becoming more attractive to visitors. There are a range of opportunities in the tourism sector by developing retail/offices and restaurants in the Exmouth Marina area, develop the cruise ship industry and plan a wider range of accommodation in Exmouth which would lead to an increase in visitors and potentially stimulate more tourism services in the region.

A key focus now is on increasing the visitor spend to the region and opportunities exist to develop accommodation and tour experiences catering to higher yield tourist markets. Increased demand for food and beverage operators offer additional hospitality opportunities.

RENEWABLE ENERGY

Businesses are faced with challenges associated with the high costs of developing infrastructure (gas pipelines or electricity networks) to areas that are sparsely populated, therefore renewable energy would be a suitable option. There are many advantages to using renewable energy as it reduces energy costs, increases the opportunities for local employment and businesses, reduces greenhouse gas emissions and provides fuel diversification – protecting the region’s economic vulnerability.

The abundance of sunshine in Exmouth experiences 320 days of sunshine per year, making Exmouth one of the best solar regions in Western Australia. It is this reason the US military operates its Learmonth Solar Observatory here. There is an increasing awareness of solar energy as it is now being used at the Ningaloo Centre.

Developing and implementing renewable energy is essential for any broader economic development strategy for the area as energy is critical for economic activities such as tourism, mining, transport and fishing to name a few.

The Shire of Exmouth is an advocate of sustainability, and have implemented initiatives such as managing waste, use of solar energy and renewable energy. The Shire is also in discussion to repilot a new waste conversion system. Furthermore, Exmouth has been plastic bag free for many years.

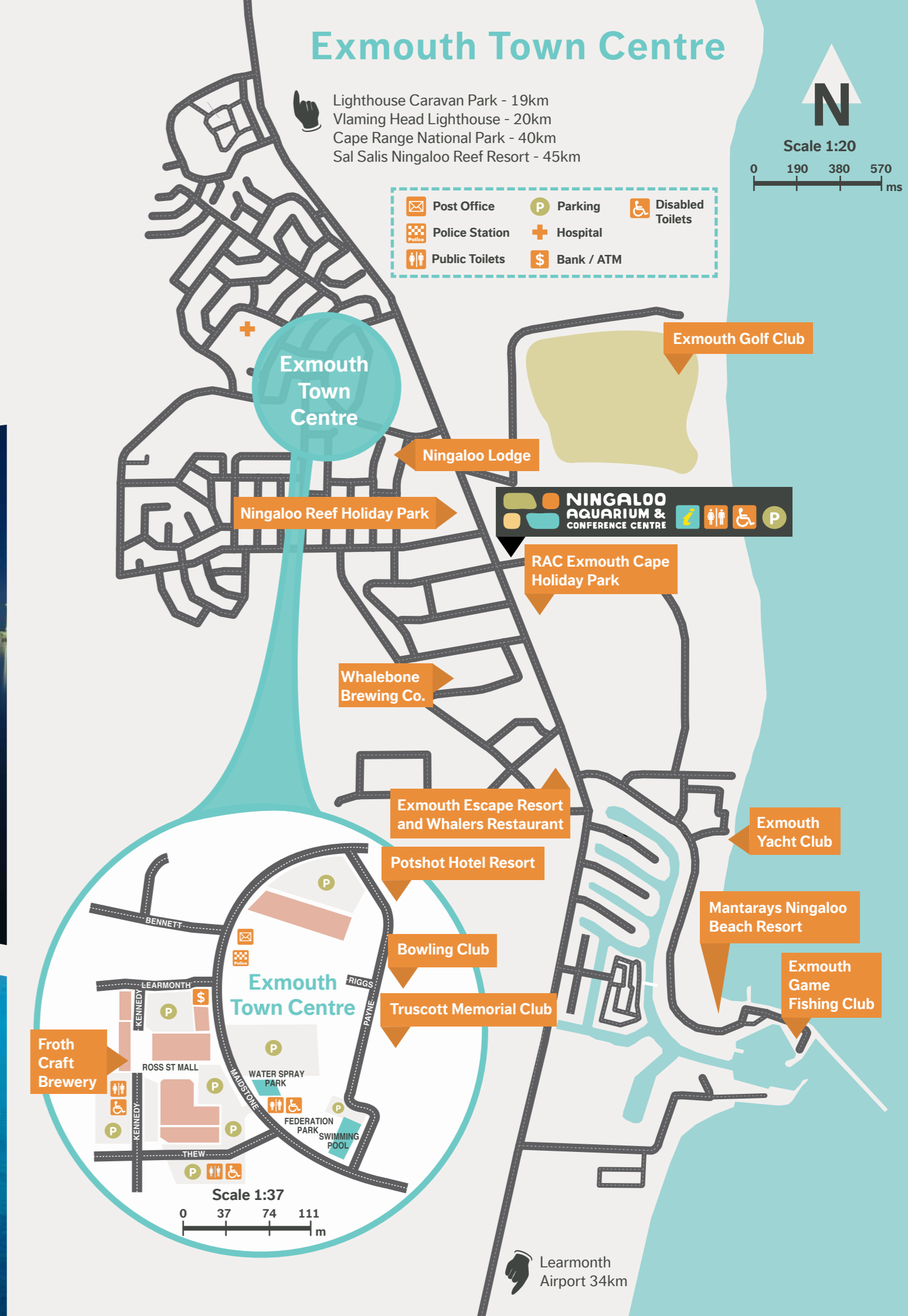
OIL AND GAS

In addition to land-based exploration, Exmouth benefits from its proximity to important offshore oil and gas operations located off the North West Shelf. This provides an advantage in servicing these operations, provide air travel for workers and residents through the Learmonth Airport and heliport as well as the development of a shore based marine servicing industry. Exmouth also serves as a logistical hub for the marine service industry, FIFO workers and residential lifestyle choice for resource sector workers and their families. The future Scarborough Gas Field project by Woodside will tremendously benefit Exmouth and allow for further opportunities.

INTERNATIONAL RESEARCH AND SCIENCE

The Ningaloo Centre is a state-of-the-art research, education, tourism and community hub. Incorporating the Central Regional TAFE into the Centre has provided teachers and students with education, research and training of marine and terrestrial science. Marine conservation and research is an important opportunity for Exmouth, especially Ningaloo Reef which attracts national and international scientists.

The Flourishing Oceans project by the Minderoo Foundation aims to eliminate overfishing and marine pollution as well as facilitate world class research. Since Australia is a global leader in ocean research, protection of marine parks allows species to flourish.



North West Cape

Police	Caravan & Camping
Hospital	Tent Camping Only
Airport	4WD Only
Information Point	Snorkel Site
Chemical Dump	Surfing
Water	Lookout
Fuel	Picnic Area
Accommodation	NP Entry Stations



DEVELOPMENT OPPORTUNITIES

To protect the tourism sector and the availability of visitor accommodation, and given the significant infrastructure planned for the region. There are a number of attractive development opportunities on offer with the Shire. The Shire recognises the opportunity for residential development in the town. As a result, there are several residential development options available to prospective investors in the town.

Land and Housing Development

To support the town's projected population growth over time, the Shire has proposed future residential areas and development opportunities. The Residential Strategic Plan outlines 7 future residential growth areas equalling to a total gross development area of 195 ha of land. The residential development will be confined to the Exmouth townsite and a total of 2,440 lots are estimated for future residential land.

Superlot D - Development WA

Superlot D is the last lot for release which is located at the Exmouth Marina Village. The superlot is 3km from the Exmouth town centre and is a waterfront development. The site is 17.9 ha with a dwelling yield of 177 and is zoned Marina. More information available from www.developmentwa.com.au.

Truscott Crescent

There are a number of privately owned development sites along Truscott Crescent. 2 privately owned sites 500 metres north of the Exmouth Marina. The eastern boundary of the site is 180 metres from the beach and height will lend the 4 sites stunning views of the Exmouth Gulf.

Lots 16 and 22 Maidstone Crescent, Town Centre

Maidstone Cres is an approximate 9,500 sq.m site that incorporates the old Shire administration building, library and townhall and an extensive car park. The site is centrally located in the old town centre.

Federation Park / Town Centre Maidstone Crescent and Payne Streets

This is an approximate 5,900 sq.m site and is just over 100 metres around from the old Shire administration site above along Maidstone Cres.

Nimitz St Residential Development Site

Nimitz St is an approximate 33.8-hectare residential development site located to the south of the main part of the Exmouth townsite around 1.3 kms from the Exmouth Marina. The site is a significant residential development site with the potential to accommodate new housing demand as Exmouth grows over time. The Nimitz street site has the capacity to accommodate 330 residential lots.

1 Marina Tce

Marina Tce is an approximate 6,200 sq. m site located on absolute waterfront in the Exmouth marina. Owned by the Shire, the site is near to marina entrance and provides ready access to the gulf of Exmouth and has a number of vessel mooring opportunities.



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