

DESTINATION PERTH

Developing Perth's Visitor Economy

MARCH 2014



Acknowledgements and Disclaimer



This document has been developed by Tourism Council WA as a strategic vision for consideration by government, industry and the community. This document does not represent the policy of any government agency, industry association or business other than Tourism Council WA.

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Cover: The Burswood Peninsula and Perth City



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Tourism Council WA

Tourism Council WA is proud to present Destination Perth, a strategy to develop our city's growing visitor economy.

Perth is our state's most popular destination and the primary hub for visitor journeys to regional Western Australia. To prosper, Perth must continue to develop attractions that draw visitors to WA. To grow, Perth must also build the hotel, venue and transport capacity to accommodate visitors.

Each year Perth welcomes thirteen million visitors. Their experience depends on the attractions we have created and the environment we are blessed with. More importantly, the Perth experience depends on the passionate people who meet, greet and serve our guests.

The future of Perth tourism does not depend on government alone. It is the combined efforts of many that create our visitor destination. From universities to restaurants, zoos to tour operators and parks to hotels; we all have a role to play.

Destination Perth is an aspirational strategy to grow tourism by working together. The tourism industry looks forward to working with government and the people of Perth, to showcase our extraordinary and evolving city to the world.

Manny Papadoulis

President



City of Perth

Perth offers a unique and memorable experience to those who visit, be it for city life, arts and culture or the many world-class natural attractions.

I welcome this vision and would like to congratulate the tourism industry, government bodies and other stakeholders who have come together to present a united path for the future of Perth tourism.

The tourism industry is at the forefront of presenting Western Australia to the rest of the world and brings with it economic, social and cultural benefits that further enhance our city.

As the local authority responsible for the capital city, the City of Perth is committed to working to promote Perth and also recognises its role and involvement in wider tourism initiatives.

This vision provides a framework for a collaborative approach to promoting Perth as a 'must visit' destination.

I look forward to working in partnership with all involved to further grow tourism in Perth and ensure that our city continues to be a vibrant destination with all the facilities, activities and service expected of a truly global city.

Lisa-M. Scaffidi

Lord Mayor

Targets and Strategy

The State Government Strategy for Tourism in Western Australia has established a target to double the value of tourism expenditure from \$6 billion in 2010 to \$12 billion by 2020. To complement this State target, the Perth visitor economy must grow to 22 million visitors per annum, creating:

- \$3.1 billion per annum in international exports earnings,
- \$7.1 billion per annum in total visitor expenditure, and
- 47,000 jobs in Perth.

To achieve these targets Perth will need to develop its capacity to accommodate visitor growth and create extraordinary experiences and events that deliver on the city's essential promise - a cosmopolitan urban experience in a unique natural environment.

The target visitor markets to achieve this growth are:

- Asia
- Domestic leisure
- Education tourism
- International and interstate business events
- Business visitors.

With strong population growth and the development of new infrastructure and attractions, Perth is well placed to appeal these target markets.

The key experience themes for Perth are:

- People and Lifestyle
- Arts, Culture and Sport
- Flagship Attractions
- Food and Wine
- Sun, Swan and Sea
- Parks, Gardens and Adventure.



Top Development Needs

Perth must double the value of tourism expenditure to achieve the State target. The target for Perth is to grow visitor expenditure to \$7.1 billion per annum by 2020. To do this, the city needs to:

1. Finalise the new Perth Airport Domestic Terminal T2 and the road and rail link from airport to the CBD.
2. Build 1,900 additional hotel rooms and create a broader range of visitor accommodation.
3. Build four new hotel sized business event venues and expand the Perth Convention and Exhibition Centre (PCEC) to 30,000m².
4. Facilitate approvals for innovative new experiences, tours and adventure activities.
5. Develop new flagship attractions including the Elizabeth Quay to Kings Park Cable Car and an Indigenous Cultural Centre.
6. Design, manage and market the city's new attractions and precincts, to attract new visitors to Perth.
7. Create an iconic annual home grown event to showcase Perth to the world.
8. Sustain investment in our public beachfronts, parks, gardens, heritage, cultural and natural assets.
9. Invest now to secure future business and tourism events that will fill the new hotels, venues and attractions as they open doors.
10. Enhance our customer service culture with staff training and liberalisation of liquor and retail trading regulations.



New City Square, part of the Perth City Link - image courtesy of the Metropolitan Redevelopment Authority

Targets and Strategy

Attractions:

Precincts, places and venues that attract residents and visitors to a destination to participate and experience activities, events, exhibits, entertainment, sport and leisure etc. Includes: aquariums, arenas, built foreshore, convention and exhibition centres, galleries, gardens, museums, national parks, stadiums, theatres, theme parks and zoological parks.

Business visitors:

Visitors who nominate business as their primary reason for travelling or visiting a particular location. Business travel comprises business, work travel for transport crews, and training and research related to employment.

Business Event visitors:

Visitors who nominate attendance at conferences, conventions, exhibitions and trade fairs, as their primary reason for travelling or visiting a particular location.

Day trip visitors:

Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Domestic overnight visitors:

People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Domestic visitor nights refer to the number of nights spent away from home in association with individual visits.

Education tourism:

Students who study in Australia for less than 12 months.

Infrastructure:

Passenger transport infrastructure and public facilities that enable visitors to access attractions. Includes: airports, cruise ship terminals, rail, roads, marinas, jetties, malls, public squares and public amenities.

International visitors:

A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over. International visitor nights refers to the number of nights spent away from home, in association with individual visits by an international visitor.

Interstate visitors:

A person is an interstate visitor when they visit a State or Territory other than that in which they reside. An interstate visitor night is any night spent in a State or Territory other than that in which the visitor resides.

**Intrastate visitors:**

A person is an intrastate visitor when they visit a location in the State or Territory in which they reside. An intrastate visitor night is any night spent in the same State or Territory as that in which the traveler resides.

Leisure visitors:

Visitors whose primary reason for travelling is having a holiday. Leisure travel comprises holidays, travel for leisure, relaxation and just “getting away”, entertainment, sport (both participation and as a spectator) and shopping.

Tourism Regions:

Tourism regions are formed by the aggregation of Statistical Local Areas (SLAs). Tourism Research Australia (TRA) and the Australian Bureau of Statistics (ABS) have adopted a coordinated approach to the use of tourism regions to enable comparability of regional data from different tourism surveys.

Visiting friends and/or relatives (VFR):

Visitors who nominate visiting friends and/or relatives as their primary reason for travelling. Visits to friends and relatives may also include travel to attend the wedding of a friend or relative or travel to attend a funeral.



Perth city, sky view



In the last five years, Perth has emerged as one of the southern hemisphere's most promising capital cities.

The city is in the midst of a significant physical, social and cultural transformation and the strong State economy has created unparalleled city based investment opportunities for private and government sectors with transport, infrastructure, hotel, office and residential developments underway.

Perth is experiencing a step change not seen in more than 40 years, brought on in response to a growing population and increased demand for services.

For the tourism sector, this brings with it new opportunities to evolve Perth as a visitor destination and to unify the industry under common goals and partnerships.

In parallel with economic growth and city development, the State Government through Tourism WA has set a stretch goal to double the value of tourism expenditure in Western Australia - from \$6 billion in 2010 to \$12 billion by 2020. This is a 'direct spend' target in relation to visitors to the State.

This Destination Perth strategy aims to bring together the issues and opportunities currently facing Perth's tourism sector, such as:

- Identifying and prioritising challenges that affect market drivers such as delivery of new accommodation, cultural and Indigenous tourism, business and events.
- The application of the Experience Extraordinary concept for Perth city, including destination development and management strategies to attract new and repeat visitors.
- Enabling effective leadership and partnerships to encourage collaboration across industry.

Quick Facts

- Perth is currently Australia's fastest growing capital city.
- Between 2006 and 2011 Perth's population increased by 14.3%.
- Population growth has a significant impact on the economy in general as a driver for retail trade, education, health and tourism.
- It is a multicultural city; almost one third of residents were born overseas.
- As Australia's sunniest capital city, it boasts an average nine hours of sunshine each day.
- Its coastline is home to 19 pristine beaches, and vast waterways, with the highest per capita boat ownership in the world.
- An affluent city, Perth is reputed to be home to the world's highest per capita ratio of self made millionaires.



Perth is diverse and a memorable destination.

It is an urban city full of activity, culture and arts, history and style with world-class outdoor attractions including: beaches, islands, parks, natural bush, wineries, sweeping hills and rivers, all in close proximity to the city.

Perth has recently been listed by The Economist, as the world's ninth most livable city and is emerging as a place worthy of international acclaim (something the locals have known for a long time now).

As a visitor destination, Perth is defined as the 'Experience Perth' tourism region, one of Australia's seventy eight tourism regions defined by the ABS.

This region incorporates the visitor journey from airport, seaport and rail hubs through to accommodation centres and visitor experiences within a return day trip. The boundaries of the tourism region incorporate:

- Perth Airport
- Perth City
- Fremantle
- Rottnest Island
- Sunset Coast from Cottesloe to Two Rocks
- Lancelin, Gingin and Chittering Valley
- Rockingham
- Mandurah and Peel
- Swan Valley
- Perth Hills
- Armadale
- New Norcia
- Avon Valley

The analysis and development of this Destination Perth strategy uses the 'Experience Perth' boundary. The area is shown on the map on the opposite page.



Double the value of tourism in Perth to \$7 billion by 2020, generating 47,000 jobs and \$3 billion in export earnings.

Perth Destination Target

The State Government Strategy for Tourism in Western Australia has established a growth target to double the value of tourism expenditure in Western Australia from \$6 billion in 2010 to \$12 billion by 2020. This target has been endorsed by State Government and adopted by the tourism industry.

As the State's gateway and most popular destination, Perth must also double the value of tourism to achieve the State target. The Perth destination target is to double the value of tourism expenditure in Perth to \$7.1 billion by 2020, generating 47,000 jobs and \$3 billion in export earnings.

Destination Perth Targets			
Targets	2010 Base Line	2012 Estimated	2020 Target
WA State Visitor Spend	\$6.3 Billion	\$7.5 Billion	\$12 Billion
Perth Visitor Spend	\$3.7 Billion	\$4.5 Billion	\$7.1 Billion
Perth Visitor Numbers	11,570,000	13,004,000	21,930,000
Perth Tourism Exports	\$1.6 Billion	\$1.9 Billion	\$3.1 Billion
Perth Tourism Employment	31,000	36,000	47,000



Perth city skyline from South Perth



Perth Destination Strategy

The key strategies to achieve this target are:

1. Addressing accommodation and venue capacity constraints on visitor growth.
2. Increasing visitor spend through higher value Perth visitor experiences.
3. Growing international visitor numbers from high yield markets:
 - i International leisure tourists from Asia.
 - ii International business event delegates.
 - iii International students and education tourists.
4. Recovering and expanding interstate visitor markets from:
 - i Increased interstate business events delegates.
 - ii Enhanced sports, art and cultural experiences for interstate weekend and short stay leisure tourists.
 - iii Enhanced sun, sea and surf experiences for interstate holidaymakers.
5. Retaining local Western Australian intrastate, overnight and daytrip visitors by upgrading a broad range of Perth visitor experiences.

A key focus of this strategy is to convert the significant State investment in Perth infrastructure and attractions into visitor expenditure, through the development and marketing of high value visitor experiences.



The Perth Visitor Economy

Perth visitors currently spend \$4.5 billion per annum, creating 36,000 jobs.

On any given day Perth hosts in excess of 100,000 overnight visitors, approximately 1 in 20 people in Perth. The economic value of Perth tourism is generated by the spending of those visitors.

In 2012 over 13 million Perth visitors spent \$4.5 billion on items such as entertainment, food, shopping, accommodation, gaming, public transport and taxis.

This expenditure does not include major items such as caravans that some visitors also purchase in Perth, nor spending prior to arrival in Perth on airfares or pre-booked packages.

Visitor Source Markets

Intrastate visitors are the largest source market for Perth, especially Western Australians taking daytrips within the region. However, the economic value of tourism to Perth is driven by the spending of overnight visitors, particularly from international source markets. International visitors stay longer and spend more on visitor experiences.

Visitor Source Market	2012 Visitors	2012 Spend	2012 Average
Interstate Daytrips	9,477,000	\$920 Million	\$97
Domestic Overnight Visitors	2,808,000	\$1,644 Million	\$585
International Visitors	719,000	\$1,923 Million	\$2,675
Total	13,004,000	\$4,487 Million	\$345



King Street shopping - image courtesy of the City of Perth



Purpose of Visit

Perth attracts visitors for a variety of reasons. The traditional Holiday and Leisure tourists are the largest economic contributors due to the high number of visitors.

A significant number of visitors to Perth are Visiting Friends and Relatives, however these visitors spend less while staying with friends and family. These visitors grow with population growth, particularly migration.

Business and Business Events visitors are high yield due to their high daily spend. Education Tourism visitors are high yield due to their length of stay in Perth.

Purpose of Visit	2012 Visitors	2012 Spend
Holiday and Leisure	5,335,000	\$1,644 Million
Visiting Friends and Relatives	4,559,500	\$888 Million
Business	1,503,500	\$840 Million
Business Events	84,500	\$131 Million
Education Tourism	140,000	\$509 Million
Other (Medical, Working Holiday)	1,381,500	\$475 Million
Total	13,004,000	\$4,487 Million



The Trustee Bar & Bistro at Brookfield Place

Perth can overtake the Gold Coast to become the 4th most popular destination in Australia for international visitors.

Out of Australia's 78 tourism regions, Perth is the 5th most popular tourism region for international visitors. Perth attracts international visitors from all global markets, including over 300,000 visitors from growing non-western markets in Asia and the Middle East.

International Source Markets	2012 Visitors
Asia and Middle East	301,000
UK and Europe	242,000
New Zealand	72,000
USA and Canada	64,000
Other	41,000
Total	720,000

International Appeal

Perth is well placed to build its international appeal by focusing on expanding leisure, education and business events markets in Asia.

Perth should aim to overtake the Gold Coast to become the 4th most popular destination in Australia for international visitors.

International Overnight Visitors 2012			
Rank	Tourism Region	State	Visitors
1	Sydney	NSW	2,697,000
2	Melbourne	VIC	1,716,000
3	Brisbane	QLD	960,000
4	Gold Coast	QLD	755,000
5	Experience Perth	WA	719,000
6	Tropical North Queensland	QLD	664,000
7	Adelaide	SA	304,000
8	Sunshine Coast	QLD	228,000
9	Northern Rivers Tropical	NSW	191,000
10	Canberra	ACT	163,000



Domestic Appeal

Perth is a popular destination in the Australian domestic market, ranked as the 7th highest tourism region for domestic overnight visitors. Perth's domestic appeal trails its international appeal due to low market share of interstate leisure tourists from markets such as Sydney and Melbourne.

Future Perth domestic visitor growth depends on growing interstate visitation and retaining local intrastate visitors, with higher value visitor experiences.

Domestic Overnight Visitors 2012			
Rank	Region	State	Visitors
1	Sydney	NSW	7,779,000
2	Melbourne	VIC	7,033,000
3	Brisbane	QLD	4,989,000
4	Gold Coast	QLD	3,521,000
5	North Coast NSW	NSW	3,200,000
6	South Coast	NSW	3,059,000
7	Experience Perth	WA	2,808,000
8	Sunshine Coast	QLD	2,788,000
9	Adelaide	SA	2,227,000
10	Hunter	NSW	2,172,000

Perth's competitive offering of a global city with a superior outdoor lifestyle can elevate the city to the ranks of Australia's top 4 tourism regions. Perth can rival Brisbane as a destination for business and education tourism, while surpassing the Gold Coast as an international visitor destination.



Sandboarding near Lancelin

Strengths and Opportunities

Perth is growing at a rate faster than any other capital city in Australia. Population growth is a significant stimulant for the local economy and provides the critical mass that drives tourism, spending and diversifies investment in new and emerging businesses. Perth has an opportunity to leverage its strengths, improve visitor experiences and strategically shape its tourism sector.

Perth is well known for its beaches and parks and supporting infrastructure that will create stronger destinations.



Perth offers a highly diverse visitor experience from nature to urban, food, wine, adventure and culture.



A cooperative approach to marketing and promotion is important.



Addressing accommodation demand and improving product diversity should continue.





Development and promotion of adventure tourism.

Celebrate and promote Perth's cultural diversity.



Strengthen Perth's use of urban centres - Mount Lawley, Leederville, Victoria Park.



Strengthen the quality and frequency of public transport - delivery of airport link.



Improve the promotion of Perth's expanding and alluring urban and nightlife experiences.



In a highly competitive global tourism market, a city's brand promise is the single minded idea that motivates visitors' travel and investment decisions and positions it as a demand destination.

Destination branding by its very nature is complex and presents unique challenges for the tourism industry, namely:

- The need to convey the destination through a complex architecture of brands managed by multiple government and industry organisations.
- National, state, regional and city brands which have the potential to conflict and dilute the overall brand meaning.
- Destination brands for target visitor markets (such as students and business events) that need to convey specific, but not necessarily conflicting, brand values.
- A destination brand is not controllable to the degree of traditional product brands as investment is driven by infrastructure, policy and economics as well as visitor lifestyle experiences.

In its simplest terms, a demand destination is a place people want to be. For Perth, this means the destination offer should present values of a great location to study, invest and conduct business, as well as a positive leisure lifestyle image – one without the other is doing only half the job.

Perth's visitor promise needs to reflect its unique personality, climate, local heritage and environment; while also representing the local people, their culture and way of life.



The Perth Cultural Centre



Significant progress has been made in Perth to consolidate its destination offer through government-led marketing campaigns, positioning and destination strategies, however, some brand confusion still exists particularly at a city level where different Perth brands compete for the attention of leisure visitors and investors.

A key focus should be the consolidation of brand values for the city which bring together the urban experience of Perth with the natural assets of its surroundings. This should be supported by policies and planning to deliver 'on brand' destination infrastructure, attractions, services and experiences. This will require industry, State and Local Government to continue to work together towards this goal.

EXPERIENCE
EXTRAORDINARY
WESTERN AUSTRALIA

PERTH

PERTH
CONVENTION
BUREAU

{Study}Perth
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Destination Brand - What's needed

- Use specific Perth brands for specific visitor markets but ensure consistent destination brand values.
- Establish one shared Perth brand for international and interstate leisure visitors.
- Deliver the visitor promise through policy, planning, infrastructure, place management, events and experiences.
- Be bold and express Perth's personality - reflect elements of adventure and fun in brand marketing.

The Visitor Promise

The values of memorable, adventurous, embracing, enterprising and collaborative should underpin Perth's visitor promise.

Memorable

Perth prides itself on the memorable experiences it delivers. Locals choose 'to stay at home' for the holidays, and visitors leave satisfied, making a personal commitment to spend more time here next time.



Adventurous

Perth's love of the outdoors, its enviable climate, blue skies, clear waterways and world class parks and ranges are at the heart of spectacular memories that visitors could never forget.



Embracing

Locals are proud of a long Indigenous heritage and colonial past and are embracing how Perth is evolving. Visitors enjoy its cosmopolitan character and welcoming attitude that attracts people from all walks of life.



Enterprising

Built on a 'can do' attitude, Perth continues to find new and innovative ways to evolve the city experience, celebrating the creative flair of its residents and businesses.



Collaborative

Working together across the industry to support product and infrastructure development, marketing and management strategies, realising that the city's tourism potential goes beyond the remit of its local industry.







Perth's Place Proposition

Taking pride in our newly vibrant city and working together to establish Perth as a primary destination choice within Australasia, through innovative promotion, progressive partnerships and smart investment.

Investment Attraction

Policy and planning for on brand destination infrastructure, attractions and customer services.

The Destination Offer

People and Lifestyle

Arts, Culture and Sport

Sun, Swan and Sea

Food and Wine

Flagship Attractions

Parks, Gardens and Adventure

Bringing together Perth's urban experience with natural assets of Fremantle, Rottneest, Peel, Swan Valley, Darling Range and Avon Valley.

Case Study: Destination London

- London's key tourist destinations are continually promoted and identifiable across the world – from the London Eye, Big Ben and Buckingham Palace to the British Museum, Hyde Park and even the Tube.
- A key part of the brand is providing diverse reasons to visit e.g. outstanding museums, royalty and rich history, large music festivals, top chefs and Michelin restaurants, high profile art exhibitions and public events.
- The London culture is reaffirmed through consistent advertising, marketing campaigns and online promotional activities, which continue to provide reasons to visit, stay and return any time of the year.
- For the London Olympics in 2012, London was rebranded as an accessible and sustainable city. Promotion and event planning was based on providing more awareness and activity in parts of London not usually visited as a destination.



Perth's visitor profile is changing. Understanding who to attract and how to meet and exceed their expectations, is essential.

Domestic tourism accounts for 70% of total visitor expenditure in Australia, however there has been a long term decline in this sector as international travel becomes more affordable.

Perth is already a global destination with 43% of expenditure from international visitors. This proportion will rise if Perth matures as a tourism destination for Asian visitors. A major upgrade of visitor experiences is required for Perth to compete as a high value destination. Higher value experiences will also enable Perth to retain and grow all leisure markets.

The target markets for growth are:

Target Markets	
Source	Purpose
Asia	Leisure, Education, Business Events
Interstate and Intrastate	Leisure
International	Education
International and Interstate	Business Events
All	Business



International students studying in Perth



Visitors from Asia

With projected annual growth of 4.1% p.a. over the next 20 years, recent economic studies by Deloitte suggest that tourism will replace the resources sector as a leading source of Australia's future growth.

This above average growth is due to the rising middle class in Asia. Perth's competitive advantage is being the closest 'western' destination to this growing mass market.

For Perth, the key Asian markets are China and growth from south east Asian countries such as Indonesia. The focus of these visitors will be on a quality urban setting that also allows access to the natural environment and outdoor experiences which are unique to Perth.

Tourism Western Australia's China Strategy aims to attract 100,000 Chinese visitors annually by 2020, a 200% increase on current visitor levels. Despite our competitive advantages of time zone and business links, our current market share of Chinese visitors falls well below that of competing Australian destinations such as Brisbane and the Gold Coast.

To realise the rapid growth experienced elsewhere in Australia, Perth needs product development strategies targeted specifically to this market. Chinese visitors seek luxury shopping, great eating and safe nature based experiences.

Perth should target the Asian market for leisure, business events and education visitors.

International Visitors	2012 Estimated	2020 Target
Chinese visitors	33,000	100,000

Visitors from Asia - What's needed

- Ongoing development of direct air services from Asia to Perth, including low cost carriers.
- Enhanced shopping experiences, reform of the Tourist Refund Scheme and development of luxury retail precincts.
- Ongoing development of nightlife, entertainment and dining experiences at Northbridge and Crown Perth.
- Redevelopment of Scarborough Beach, Cottesloe Beach and Rottnest Island visitor facilities.
- Chinese language signage, audio tours and interpretive material at attractions such as the new WA Museum, Kings Park, wildlife parks and National Parks.
- Introduce China Ready Accreditation to raise the standards of the Chinese visitor experience.

Domestic Leisure

Leisure tourism remains the primary driver of visitor numbers and spending in Perth. In addition to above average growth in international tourism from Asia, Perth can also achieve growth in domestic tourism. Perth also needs diversity in its leisure tourism markets, which are susceptible to changes in the exchange rate.

Daytrips and Intrastate Visitors

Local tourism should grow with the rise in Perth and Western Australia's population. By investing in enhanced visitor experiences, Perth will retain its local tourism rather than lose market share to competing destinations such as Melbourne or low cost Asian destinations.

Interstate Visitors

Perth's market share of Australian interstate leisure visitors has declined from 3.3% in 2007 to 2.5% in 2012, a loss of 72,000 visitors. This loss is due to hotel shortages and a poor perception of the value of visitor experiences.

Greater hotel capacity and reduced cost inflation from the slowing resources sector will improve the cost competitiveness of Perth for interstate leisure visitors.

Perth's significant investment in attractions such as the Perth Arena, Perth Stadium and Scarborough Beach will also increase the value of visitor experiences. Coupled with effective marketing of these experiences, Perth can recover previous interstate leisure market share and rival the Gold Coast as a leisure destination, with superior urban and natural outdoor experiences.

Purpose of Visit	2012 Visitors	2012 Spend
Holiday and Leisure	5,335,000	\$1,644 Million

Interstate Leisure Visitors	2012 Estimated	2020 Target
National market share	2.5%	3.3%

Domestic Leisure - What's needed

- Enhance urban, natural and outdoor experiences.
- Address hotel capacity constraints.
- Consistent marketing into Sydney and Melbourne on par with the Gold Coast's destination marketing investment.



Education Tourism

Each year Perth attracts 140,000 visitors for education purposes ranging from formal tertiary studies through to language schools and short informal courses.

Education tourism is Perth's highest yield visitor market, where 1.1% of visitors account for 11.3% of Perth visitor spending. Their high expenditure is due to their length of stay in Perth during the course of their studies.

Perth's education tourism is worth half a billion per annum. This only includes visitors staying for less than 12 months and does not include all long term international students. International students in total generate \$1.3 billion in gross value-add for the WA economy.

Attracting international students to study in Perth, for short and longer term qualifications and courses, is a sizeable business with growth potential particularly from the Asian market.

Education and social connections formed during study periods in Perth often create networks that attract future visitation and investment from abroad. Barriers to leveraging this market include a lack of centrally located accommodation, convenient public transport and perception of safety and security.

Purpose of Visit	2012 Visitors	2012 Spend
Education	140,000	\$509 Million

Education Tourism - What's needed

- Increased investment in Study Perth destination marketing to attract students from growth and emerging Asian markets.
- Development of student friendly accommodation in Perth city.
- Light rail and bus routes from Perth city to major campuses.
- Enhanced visitor servicing for student arrivals at Perth Airport and their first few days in Perth.
- Improved policing of entertainment areas and public transport at night.
- Stronger partnerships between the leisure tourism sector and Perth's universities and colleges to deliver enhanced visitor experiences to international students and the families and friends who visit them in Perth.

International and National Business Events

Visitors attending conventions, conferences and exhibitions in Perth spend \$131 million per annum. Attracting these lucrative business events requires consistent market positioning, the right physical infrastructure and a range of high quality experiences to offer outside of official meetings, conventions and events.

The 2013 Perth Business Events Supply and Demand Study, by AEC Group, found that current market conditions for local business events has been affected by the weaker demand from the resources sector, government and general business.

Business events growth will be achieved by attracting higher yield national and international markets. This requires competitive business event venues, accommodation development and enhanced marketing. The study also found:

- The various venue expansion projects underway will increase Perth's daily business events capacity from 35,000 to 38,000 delegates.
- The anticipated venue developments are: Crown Perth, FESA House, Elizabeth Quay and Waterbank projects.
- There is sufficient venue capacity to cater for local business events which do not need overnight accommodation.
- National and international business events need hotel accommodation and venue space for 500 plus delegate capacity.
- Larger venues such as the PCEC and large hotels are the most significant from a tourism and visitor expenditure perspective.
- Repositioning and seeking larger international conferences and business events will require consideration of the future expansion of the PCEC.

Purpose of Visit	2012 Visitors	2012 Spend
Business Events	84,500	\$131 Million

Perth Business Event Venues	2012 Estimated	2020 Target
Business Event Space	58,000m ²	64,000m ²
PCEC Pavillion Space	16,700m ²	30,000m ²
New Large Hotel Venues	n/a	4



Crown Perth events and conferences - images courtesy of Crown Perth

Business Events - What's needed

- No public investment in business event venues that are not co-located with accommodation.
- Develop four new hotel business event venues to achieve the 2020 growth, including a significant 3,700m² expansion planned for Crown Perth.
- Subject to a feasibility study, expand PCEC pavilion space from 16,700 m² to 30,000 m² for multiple international exhibitions.
- Significantly increase funding for Perth Convention Bureau in 2014, to win bids now which will fill the new venues with future events.
- Develop a market positioning strategy for Perth as a key business destination.
- Create strong partnerships between the business events and leisure tourism sectors, to offer enhanced pre and post conference visitor experiences.



Business Visitors

Perth attracts 1.5 million Perth business visitors, spending \$840 million per annum. Business visitors are high value due to their high spend in Perth on items such as accommodation.

Unlike other visitor markets, business visitors cannot be stimulated by consumer marketing. Growth in business visitor numbers depends on investment in commercial precincts and attracting new businesses and corporate offices to Perth.

Perth's visitor infrastructure is crucial to positioning the city as a business destination. This includes passenger transport, business event space, hospitality and experiences to attract workers and visitors.

Most importantly, growing Perth as a business destination depends on having sufficient rooms to meet demand and the right mix of 3, 4 and 5 star accommodation to cater to all types of business visitors.

The expenditure of business visitors while in Perth can be significantly improved by offering higher value leisure experiences during their stay, such as weekend events in Perth to encourage business visitors to extend their mid week stay and bring their families with them.

Purpose of Visit	2012 Visitors	2012 Spend
Business	1,503,500	\$840 Million

Business Visitors - What's needed

- Attract corporate headquarters and business offices to Perth through the development of commercial space.
- Plan accommodation adjacent to commercial development to meet increased business visitor demand.
- Develop business hotels in precincts such as Perth City Link and a luxury hotel at Elizabeth Quay.
- Enhance Perth's event calendar particularly for weekends and other periods of low occupancy.
- Bring PCEC into Elizabeth Quay, creating an integrated business, events and leisure precinct along the Swan River from PCEC through to Barrack Street Jetty.
- Develop a market positioning strategy for Perth as a key business destination.



What Are They Looking For?

The key qualities of great a destination are universal. Ultimately visitors are looking for value for money with places that offer a range of things to do, are easy to get around, have a variety of places to stay, unique food and experiences that provide insights into how local people live and interact.



Customer Service

- Quality customer service
- Friendly and helpful people
- Consistent quality
- Productivity and participation



Perth Hills



Mandurah



Cottesloe



Swan Valley



Fremantle



Arriving and Leaving

- High quality and friendly arrival experience
- Easy access to the city from the airport
- Visitor information





Avon Valley



Swan River



Scarborough

Things to See and Do

- Special events
- Adventure tourism
- Cultural tourism
- Insights into 'how the locals live'
- Urban / nature experience

Getting Around

- Modern, quality infrastructure
- Frequency and variety of public transport
 - bus
 - train
 - light rail
 - water based



Perth CBD



Rottnest Island



Kings Park



Rockingham



Places to Stay

- Hotel accommodation
- Quality service
- Coordinated marketing and promotion

A demand destination needs world-class passenger and customer services.

City Connection

A day and night dining, events and entertainment lifestyle is the norm for Perth's growing residential population and a minimum expectation for visitors. The quality of these experiences depends on safe, reliable, 24/7 passenger transport connections across public attractions and precincts.

Destination Connections

Visitors are heavy users of public transport and light rail is the preferred model in modern cities. Perth needs to establish connections between the airport, city and visitor destinations such as universities, beaches, parks and gardens.

Enhanced transport will increase local daytrip tourism as well as attract international and national events and businesses. International and interstate visitors will spend more and stay longer as leisure experiences become more accessible.

Customer Service

High quality facilities, attractions and transport is not enough. Compelling visitor experiences need excellent customer service. Tourism, retail and hospitality businesses need to understand the needs of visitors and local customers and deliver high standards of customer information and service that meet them.



Elizabeth Quay Bridge - image courtesy of the Metropolitan Redevelopment Authority



Destination Services - What's needed

- Affordable customer service training for all frontline staff delivering tourism, retail, hospitality or transport services.
- Enhanced visitor arrival facilities and services through the Perth Airport redevelopment project.
- Airport rail link to the city with easy connection to Burswood, Fremantle, Mandurah and Armadale destinations.
- 24/7 east-west light rail through the city extending to key destinations: Scarborough, UWA, Northbridge and ECU (Mount Lawley).
- Enhanced public transport offering safe day and night services from city accommodation to Perth Stadium, Crown Perth, Perth Arena and dining precincts.
- Increased promotion of independently assessed quality assured tourism businesses and star rated accommodation.
- High quality taxi services with improved customer service, cleanliness, presentation and vehicle uniformity.
- Permanent CBD helipad for airport-city connections, tours and emergency services.
- Visitor Centre at Perth Airport and new visitor information shopfronts at precincts such as Elizabeth Quay.
- New online visitor tools such as Experience WA mobile app and free Wi-Fi visitor destinations.



Planned Perth Airport Pier – image courtesy of Perth Airport

Visitor overnight stays in Perth will increase from 32.6 million to 54.9 million nights by 2020.

Increasing visitors means an increase in visitor nights and the need for accommodation. Visitors require a broad range of accommodation depending on their purpose of visit and origin.

Accommodation Type	Visitor Nights 2012		
	Domestic	International	Total
Friends or relatives property	5,192,000	7,608,000	12,800,000
Rented house, apartment, flat or unit	870,000	10,071,000	10,941,000
Standard hotel / motel (below 4 star)	1,124,000	809,000	1,933,000
Luxury hotel / resort (4 or 5 star)	1,069,000	343,000	1,412,000
Backpacker / hostel	100,000	1,068,000	1,168,000
Serviced apartment	463,000	455,000	918,000
Homestay	9,000	662,000	671,000
Education institution dormitory or college	18,000	578,000	596,000
Hospital and related accommodation	294,000	1,000	295,000
Caravan park / commercial camping	234,000	42,000	276,000
Guest house or B&Bs	92,000	79,000	171,000
Other	706,000	714,000	1,420,000
Total	10,171,000	22,430,000	32,601,000

Some of the increase in visitor nights will be absorbed by 'residential' accommodation such as staying with friends and family. However, the target markets of Asian, international and interstate leisure, business and business events visitors are more reliant on a range of commercial accommodation.

Catering to different visitors requires accommodation in a range of locations. Equally important is providing a range of accommodation styles and standards from budget 3 star to luxury 5 star accommodation.

Perth Accommodation	2012 Estimated	2020 Target
Visitor Nights	32,601,000	54,974,000



Accommodation needs to be co-located with precincts and assets that attract visitors. Education institutions need accommodation for international and interstate students. Hospitals need accommodation for visiting friends and relatives. Stadiums and event venues need accommodation for spectators and business event venues need accommodation for delegates.

Suitable co-located accommodation increases the competitiveness of precincts and assets, realises the tourism economic return and can provide a revenue stream for public assets such as stadiums and convention centres.

Attractions	Visitor Types	Accommodation Needed
Elizabeth Quay and PCEC	Business Business Events International Leisure	4-5 star luxury hotels
Mixed-use urban precincts e.g. CBD, Perth City Link, Riverside	Business Interstate and family leisure Visiting friends and relatives Working holiday-makers	Express / business hotels 3-4 star standard hotels Serviced Apartments Hostels
Coastal, natural and peri urban areas e.g. Scarborough Beach, Rottnest Is, Swan Valley	Visiting friends and relatives Domestic leisure International leisure	Serviced Apartments 4-5 star luxury hotels / resorts Caravan Parks Farmstay, Guest House, B&B
Education Institutions	Students	Campus / dormitory Student friendly medium density residential rental
Event venues e.g. stadium, cultural centre, arena	Domestic leisure International leisure	3-4 star standard hotels Serviced Apartments 4-5 star luxury hotels / resorts
Business Parks, Perth Airport and transport hubs	Business	Express / business hotels 3-4 star standard hotels Serviced Apartments

An additional 1,900 rooms are needed by 2020 to address the critical Perth hotel shortage.

The shortage of hotel and short stay accommodation in Perth has been well documented. It has driven up room rates and spend of business visitors, but displaced the more price conscious leisure visitors.

Despite higher room rates, construction costs and regulatory burdens have limited private sector delivery of new hotel rooms. Current public policy incentives for hotel investment should be continued until the target of 1,900 rooms is achieved. Incentives should be reviewed at this point and not continued to the point of oversupply. The risk of oversupply could become a deterrent to private investment.

Hotel incentive policies should be applied to all types of hotels, including 3 to 4 star budget and business express hotels. Confining incentives to luxury hotels will create an oversupply in the already top heavy 5 star hotel market.

A broader range of hotel operators is also needed to tap into hotel chain loyalty programs and hotel brand with recognition and booking capacity in Asian markets.

Accommodation Constraints

- Recent reports note that potential revenue loss to the local tourism industry is in the order of \$213 million to date and could increase to \$660 million annually by 2019-20, if the issue is not addressed.
- Combined with the aim to attract approximately 22 million visitors and \$7 billion expenditure in Perth by 2020, an additional 1,900 new rooms will be required.

Perth Accommodation	2012 Estimated	2020 Target
New Hotel Rooms	n/a	1,900



Rendezvous Hotel Perth, Scarborough Beach



Places to Stay - What's needed

- Coordinated planning to co-locate accommodation with visitor demand drivers such as: commercial precincts, business event venues, stadiums, major attractions, universities and hospitals.
- Continue State land release and incentives for private investment towards 1,900 new hotel rooms.
- A range of accommodation grades from 3 star budget to 5 star luxury and serviced apartments.
- Express hotels that cater to medium tier business travellers.
- Budget hotels and serviced apartments to cater to interstate, family travel and long stay leisure visitors.
- 5 star hotels at the riverfront and premium business districts.
- Investment attraction strategies to target brands that are recognised by the Chinese and other Asian markets.
- Establish a flexible planning and regulatory environment that encourages investment in tourism.



The new Terrace Hotel , St Georges Tce Perth

Crown Perth and the new Crown Towers

Crown Perth currently welcomes over seven million visitors and local guests annually, and has hosted over 4,000 business and leisure events over the past three years.

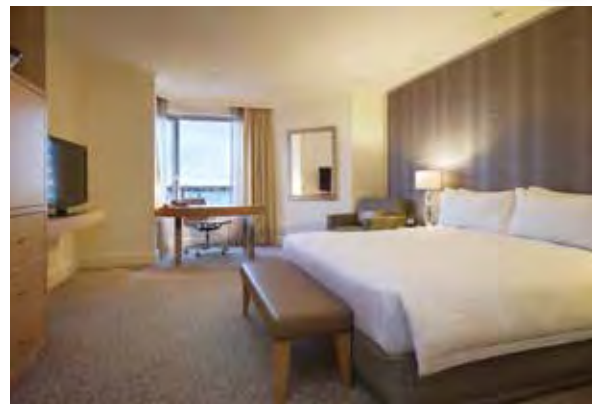
The resort underwent a \$750 million refurbishment, which was completed in 2012. With over 5,600 staff, Crown Perth is the largest single-site private sector employer in Western Australia.

Crown Perth is developing a new six star, luxury hotel to be known as Crown Towers, to be completed in 2016. The 500 room hotel will be the largest hotel in Perth, bringing the total room capacity at Crown Perth to just under 1,200 rooms.

The resort will also include additional conference and convention facilities as well as restaurants, bars and retail shops. The new Crown Towers hotel and facilities are expected to provide employment for over 500 people.



New Crown Towers - image courtesy of Crown Perth



Clockwise: Crown Perth, Hyatt Regency Perth - River View Room, Hyatt Regency Perth, Ibis Perth



Few cities can compete with Perth's quality lifestyle and picturesque scenery, but making people feel special is what will keep them coming back.

Developing high value experiences is essential to attracting and retaining visitors. Perth's essential offering is a modern city with a natural outdoor lifestyle.

Creating a destination with difference in an increasingly homogenised market is a challenge that faces major cities around the world. Assets, experiences, economy and image are major influencing factors in how visitors see Perth from the outside, and how locals view their city from within. But it is the ability to create an emotional bond with a place that sets successful cities apart from their competitors.

Developing visitor experiences is the key to this strategy. Perth can deliver the Experience Extraordinary brand promise in both an urban and natural outdoor environment:

- People and Lifestyle
- Arts, Culture and Sport
- Flagship Attractions
- Food and Wine
- Sun, Swan and Sea
- Parks, Gardens and Adventure

Extraordinary Experiences - What's needed

- Facilitate planning and approval for private investment in new attractions, tours and experiences.
- Develop world class public attractions such as the new Perth Stadium and New Museum WA projects.
- Ensure these public attractions are designed, built and managed to achieve tourism objectives.
- Invest in marketing, events and exhibits to activate public attractions and generate a tourism economic return.
- Consider local residents as tourists and work to enhance their visitor experience.



Perth's environment and new venues are the ideal stage for world class events.

Major events ranging from the America's Cup to the Commonwealth Heads of Government Meeting (CHOGM) demonstrate that Perth loves to host an international party. However, Perth needs an annual international event that showcases the city and attracts the world's attention year after year.

International events can be purchased, but they are expensive and do not always reflect the Perth identity. Perth needs to create a more iconic home grown event that celebrates our unique environment and outdoor lifestyle.

This could be an event such as a "River of Lights" evening boat parade along the Swan River, viewed from world class destinations such as Kings Park and Elizabeth Quay, or an outdoor event that attracts international and local participants and spectators.

The event would deliver the Perth visitor promise and be a key pillar in an annual calendar of exhibitions, shows and events which use our new venues such as the Perth Arena, Perth Stadium and New Museum WA.

Extraordinary Events - What's needed

- An iconic home grown international event which celebrates Perth's unique appeal.
- Planning now to attract and develop new events for new venues such as the Perth Stadium.
- A calendar of events timed to attract visitors during weekends, shoulder seasons and periods of low accommodation occupancy or empty venues.
- Public attractions designed and built to stage new and emerging events.
- A calendar of events that activate and publicise Perth's flagship attractions.
- Liberalisation of liquor, food and hospitality services to enable innovation in events.



Skyworks Perth



Kings Park Festival, Kings Park



Joondalup Festival, Joondalup

Perth's environment and new venues are the ideal stage for world class events.

With approximately 50,000 new residents moving to metropolitan Perth each year, the expanding population base brings with it a growing critical mass fuelling demand for higher quality services.

Combined with a recent relaxation in liquor licensing regulations, new bars, restaurants and night time attractions are making their mark, along with international and luxury retail brands establishing themselves in the city.

In addition, inner urban areas such as Leederville, Northbridge, Mount Lawley and Victoria Park have become attractions in their own right, offering unique shopping, dining and cultural experiences. Positioning these neighbourhoods as important visitor destinations, linked to the capital city and providing authentic insight into local lifestyle, is now opportune.

With a third of its residents coming from overseas, Perth is without question, a multicultural city. The city has a rich ethnic mix which brings a host of food, culture and lifestyle opportunities that could be further celebrated to benefit local, national and international visitors.

Food and Wine – Visitors 2012	Daytrips	Intrastate	Interstate	International
Restaurants and cafes	3,724,000	979,000	645,000	646,000
Shopping for pleasure	1,757,000	511,000	241,000	547,000
Markets	245,000	88,000	115,000	349,000
Pubs, clubs and discos	415,000	230,000	179,000	314,000
Casino	95,000	25,000	10,000	119,000
Movies and cinema	101,000	74,000	34,000	150,000

Perth Visitor Experiences	2012 Estimated	2020 Target
People and Lifestyle	12,200,000	20,570,000



People and Lifestyle - What's needed

- Cohesive positioning and promotion of Perth's day and night experiences and its cosmopolitan urban culture.
- Improve integrated public transport options between the city and inner urban areas focusing on night time services, frequency and access, and linking each area to encourage movement between them.
- Further liberalisation of liquor and hospitality services to enable innovation and meet international visitor expectations.
- Continue to develop and promote diverse retail experiences, from local boutiques through to high street fashion and luxury goods.
- Support and promote ethnic hawkers markets and multicultural food.



Venn Bar & Cafe' - image courtesy of the City of Perth



Night life, Perth



Murray Street Mall shopping - image courtesy of Perth Convention Bureau

Already known for its love of sport, Perth is establishing an enviable reputation for arts and culture.

The State Government has recently invested in new cultural and sporting facilities including the Perth Arena and the State Theatre Centre of Western Australia; as well as the new museum and stadium projects. Other upgrade projects include: NIB Stadium, Perry Lakes Stadium and the restoration of the Art Gallery of Western Australia and His Majesty's Theatre. The Perth Cultural Centre has also been revitalised for improved public use.

Arts and Culture

Perth is building a reputation for delivering world class arts and cultural activities through the Perth International Arts Festival, the Perth Fringe Festival and Perth Fashion Festival. Its arts scene continues to thrive by showcasing Western Australia through its performing arts, literature, fashion, film and visual art industries.

Indigenous Culture

The sharing and celebration of Indigenous culture in Perth must be improved. Local, domestic and international visitors desire opportunities to engage with Indigenous people and experience Indigenous culture. Developing an Indigenous Cultural Centre, to share Indigenous stories, history, art and life would provide economic opportunities for local Indigenous groups and create a new tourism attraction for Perth.

Sport

The people of Perth are passionate about their sport, whether it be participating or watching from the sidelines. There is always a sporting event on, which people flock to – of course after enjoying a local pre or post-match food and beverage. Perth people are especially fond of their football, cricket, soccer, rugby, basketball, sailing and surfing.

Arts, Culture and Sport – Visitors 2012	Daytrips	Intrastate	Interstate	International
Theatre, concerts & performing arts	133,000	88,000	15,000	77,000
Museums, galleries, art studios	169,000	59,000	113,000	306,000
Festivals, fairs and cultural events	156,000	67,000	21,000	87,000
Sporting events	199,000	78,000	47,000	64,000
Indigenous culture	n/a	n/a	n/a	162,000
Movies and cinema	101,000	74,000	34,000	150,000

Perth Visitor Experiences	2012 Estimated	2020 Target
Arts, Culture and Sport	1,850,000	3,120,000



Arts, Culture and Sport - What's needed

- An integrated approach to planning, management and cross promotion of the city's sporting, arts and cultural assets, with a focus on tourism outcomes.
- Continue to plan for and invest in new arts and culture assets:
 - an Indigenous Cultural Centre
 - a new major Lyric Theatre
 - the new Museum
 - upgrade the existing Perth Concert Hall or build a new Concert Hall or Recital Hall.
- Ensure the new Stadium can realise tourism outcomes by:
 - Providing at least 10,000 seats for interstate visitors to AFL matches and sporting events.
 - Creating a sporting museum and leisure experiences to attract visitors between sporting events.
 - Providing business event space and an adjacent hotel to attract large business events.
- Continue to develop the city's annual events calendar with a focus on providing a mix of new sporting, culture and arts activities.
- Promote the marketing, funding and development of Indigenous tourism experiences in the city with a focus on programs that deliver training and employment opportunities.



Patersons Stadium, Subiaco



New Museum for WA

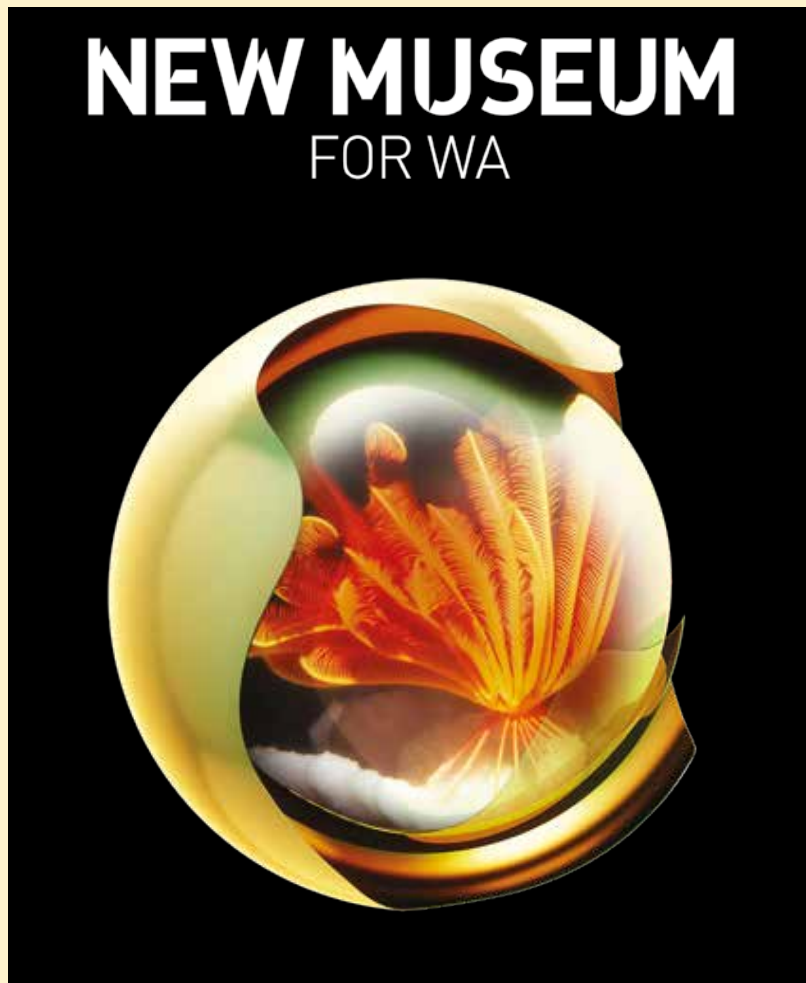
Doors open in 2020 on the \$428 million New Museum for WA, located in the heart of the Perth Cultural Centre.

The New Museum will draw from the WA Museum's internationally significant collection including the famous Blue Whale, which will return in a spectacular display.

Visitors will discover what it means to be Western Australian and explore our contribution to the world; through trade, global economies, conflicts and creativity. The New Museum will showcase our State's unique biodiversity; our land and oceans, ancient landscapes and the earliest evidence of life on Earth.

It is expected to attract 200,000 more visitors each year including over 100,000 international and interstate visitors who will spend \$11 million per day in Perth.

As it evolves, the New Museum will play an important role in redefining Perth and showcasing Western Australia to the world.



The New Museum for WA - graphic courtesy of the Museum of WA



Interior of the State Theatre Centre of Western Australia

Perth is bright, friendly and cosmopolitan with beautiful physical assets, but as visitors become more sophisticated, the city's destination offer needs to evolve beyond beaches and open space.

Great global cities are generally characterised by a combination of flagship attractions and the finer grained culture, heritage, recreation and street life of a place. Major attractions have the ability to set a city apart from its competitors and they also anchor other smaller attractions on offer.

Perth needs icons that epitomise the brand of a cosmopolitan city with a natural outdoor lifestyle. The proposed cable car from Kings Park to Elizabeth Quay would create the signature experience, physically and symbolically linking the city experience with the outdoor nature experience.

An Indigenous Cultural Centre or place for local Noongar people would provide a destination to experience local cultures and position Perth as a sophisticated city that has a rich and diverse appreciation of arts and culture.

Perth is yet to realise the advantages of existing icons and additional attractions are required to ensure the city remains competitive at a national level.

Attractions and Tours - Visitors 2012	Daytrips	Intrastate	Interstate	International
Historical and heritage sites	124,000	42,000	63,000	205,000
Amusement parks, zoos and attractions	398,000	59,000	97,000	392,000
Sightseeing precincts	1,213,000	311,000	283,000	495,000
Guided tours and excursions	27,000	5,000	18,000	117,000

Perth Visitor Experiences	2012 Estimated	2020 Target
Attractions	3,850,000	6,490,000



Attractions - What's needed

- Create a place and/or an Indigenous Cultural Centre to showcase and experience the local Indigenous cultures.
- Examine private investment opportunities to develop the proposed Cable Car from Kings Park to Elizabeth Quay as the defining Perth visitor experience.
- Consolidate PCEC, Cable Car and Elizabeth Quay under a single government agency responsible for Perth's flagship attractions.
- Develop new wildlife, adventure and theme park rides and experiences.
- Develop new adventure tourism product in close proximity to the city.
- Sustained investment in existing attractions such as Kings Park, The Bell Tower, Perth Cultural Centre, Fremantle Prison, the Swan Valley and Rottnest Island.
- A calendar of events that activate and publicise Perth's flagship attractions.



Perth Cable Car artist impression - commissioned by Tourism Council WA



The Bell Tower



Fremantle Prison

Celebrating the Swan Valley as the city's culinary tourism destination.

With approximately 80 wineries, a range of quality, family-run produce businesses and impressive cafés and restaurants, the Swan Valley is a foodie haven right on the city's doorstep, located just 20 minutes away.

While popular with the locals on weekends, the Swan Valley's identity as a major city visitor attraction could be heightened to attract new and repeat visitors. Its strengths as a visitor destination include:

- Proximity to Perth and established tourism infrastructure.
- Food and wine, including production.
- Swan River, picturesque scenery and environment.
- Established local economy and business community.

Given the diversity of Western Australia's food production capabilities, from the Ord Valley in the north west to the Southern Forests in the south, there is a unique opportunity to position Perth and the Swan Valley as being a snapshot of the State's high quality culinary produce and tourism offer.

Perth needs new food and wine experiences such as open air night markets, produce markets, cider houses and food and wine tours.

Inner city precincts such as Elizabeth Quay should celebrate al fresco dining while high end attractions such as Crown Perth can continue to offer high value food and wine experiences.

Food and Wine – Visitors 2012	Daytrips	Intrastate	Interstate	International
Restaurants and cafes	3,724,000	979,000	645,000	646,000
Wineries and farms	213,000	47,000	52,000	292,000



Sandalford Winery



Perth Visitor Experiences	2012 Estimated	2020 Target
Food and Wine	6,600,000	11,130,000

Food and Wine - What's needed

- Define a culinary tourism place brand for the Swan Valley and position the area as a key city-based visitor destination for local residents and visitors.
- Promote the region's natural produce through local restaurants, markets, festivals, cafes and restaurants.
- Support and promote ethnic hawkers markets and multicultural food.
- Ongoing liberalisation of liquor, food and hospitality services to enable innovation, particular with events and dining in the public domain.
- Develop Perth food and wine events with a focus on outdoor experiences.



Clockwise: Perth nightlife, Fremantle Markets, Margaret River Chocolate Company, Swan Valley, Cheese Platter Lancaster Wines, Gershwin Winery, Hyatt Regency Perth

Perth's beaches and river front are among the best in the world but people are after more services and facilities.

Water sports in Fremantle, diving at Rottnest Island, deep sea fishing off Hillarys, swimming at Rockingham, dolphins in Mandurah and Swan River cruises are classic Perth experiences. The sheer beauty of Perth's coastline and the Swan River is undoubtedly breathtaking but discerning locals and visitors are always in search of some extra comfort and amenity.

Long standing issues related to the revitalisation of iconic beachfronts including Scarborough and Cottesloe Beaches have seen both fall behind their local and national counterparts in terms of the quality of experience and amenity that they offer visitors, beyond sand and sea. Strategic physical interventions, consolidated brand, place management and investment attraction strategies are needed for each to realise their potential as major attractions for the local community and beyond.

Similarly, local icons Rottnest Island and Fremantle each require sustained investment in visitor infrastructure to enable them to remain competitive in a global market. Improving accommodation variety, product diversity and a focus on evening activities is important. For Fremantle, accelerating the revitalisation of Victoria Quay and the Passenger Terminal to incorporate a high quality arrival and departure experience is essential for the 450,000 to 550,000 visitors who pass through each year. For Rottnest Island, a luxury accommodation option is fundamental to re-engage high yield locals and the lucrative Asian market.

Elizabeth Quay, Point Fraser and the Riverside project are each bringing long overdue opportunities for people to closely access and experience the Swan River while also enjoying modern recreation and other amenities. Continuing the delivery of recreational mooring and jetties along the Swan River and coast will improve access, activate key destinations and provide a unique visitor experience.

Sun, Swan and Sea – Visitors 2012	Daytrips	Intrastate	Interstate	International
Going to the beach	812,000	253,000	182,000	466,000
Whale or dolphin watching	10,000	8,000	n/a	95,000
Water activities and sports	129,000	80,000	27,000	194,000
Fishing	153,000	63,000	34,000	63,000
Charter boat, cruise and ferry rides	97,000	37,000	39,000	167,000

Perth Visitor Experiences	2012 Estimated	2020 Target
Sun, Swan and Sea	2,910,000	4,910,000



Sun, Swan and Sea - What's needed

- Scarborough and Cottesloe beachfront revitalisation including investment in supporting amenities and infrastructure (food and beverage, retail, board walks, seating, shade, play spaces).
- Protect the Swan River and provide sustainable access and tours at riverfront locations.
- Maintain and expand jetties for marine tourism.
- Provide public transport access to coastal and river front locations including light rail to Scarborough Beach.
- In Fremantle, improvements to Victoria Quay and Fremantle Passenger Terminal infrastructure to support the cruise market. Investment to establish a Super Yacht Boat Harbour and upgrade Fisherman's Wharf.
- Provide a greater range of night time activities at key waterfront locations including the Swan River, Cottesloe Beach and Scarborough Beach.
- Provide value-added waterfront experiences such as night markets, beach front sun bars, beach chairs, umbrella hire and food trucks.
- Delivery of luxury accommodation on Rottnest Island and reduced regulatory costs on ferries and tours.



Various sun, swan river and sea attractions and activities across Perth

Parks and Gardens

Perth is in the unique position of being able to bring together the city's urbanity with its unique environmental attractions – many of these within a 30 minute journey.

Perth's iconic Kings Park and Botanic Garden attracts approximately 6 million visitors each year. The park's popularity has soared as a result of regular activities and events and investment in new infrastructure that have increased its appeal to a range of different audiences. The proposed Cable Car linking Kings Park and the future Elizabeth Quay will become a differentiating factor that the city needs.

Like Kings Park, it is also important that other outdoor parks, bike paths, trails, sports fields and reserves are positioned and promoted as places of activity. Improving the range of organised activities, visitor infrastructure and events will encourage more use by locals and therefore visitors.

Parks, Gardens and Adventures – Visitors 2012	Daytrips	Intrastate	Interstate	International
National Parks or State Parks	265,000	88,000	85,000	346,000
Botanical or other public gardens	242,000	53,000	97,000	300,000
Bushwalking	274,000	89,000	22,000	149,000
Picnics and BBQs	432,000	91,000	42,000	n/a
Cycling	126,000	41,000	15,000	79,000
Playing Golf and Sports	176,000	70,000	39,000	99,000
Outdoor adventure e.g. bungee jumping	77,000	27,000	6,000	52,000

Perth Visitor Experiences	2012 Estimated	2020 Target
Parks, Gardens and Adventure	3,390,000	5,700,000



Kings Park, Perth



Parks and Gardens - What's needed

- Prioritise private development of the Cable Car linking Kings Park and Elizabeth Quay.
- Continuously upgrade visitor facilities, tours, events and experiences in public parks and gardens such as Kings Park, Yanchep National Parks, Matilda Bay Reserve and Araluen Botanical Park.
- Promote new bushwalking and park experiences such as the Munda Biddi Trail and existing assets such as the Bibbulmun Track.
- Link inner city bike path networks and create cycling trails to and around destinations such as the Swan Valley.
- Regulatory reform to facilitate private development of caravan sites around Perth.



Clockwise: Kings Park Botanical Garden, Caravanning at Dwellingup, Segway WA, Matilda Bay, Walking trails, Yanchep National Park



With vast natural assets, it's time to capitalise on adventure as a hallmark experience.

No Australian tourism region has emerged as the adventure tourism capital. With accessible natural assets, great weather and active outdoor lifestyle, Perth is ideally suited to become Australia's leading adventure tourism destination.

Adventure experiences traditionally reserved for regional Western Australia should be incorporated into Perth's visitor offer, demonstrating the unison between the city and its surrounding environment.

Perth has already established adventure tourism experiences such as long distance walking trails, mountain biking, sky diving and hot air ballooning in the Avon Valley. Events such as the Avon Descent reinforce Perth's place as an adventure destination.

The key opportunity is to develop inner city adventure experiences centered on Kings Park and the Swan River ranging from segway tours to extreme sports.

Adventure - What's needed

- Extend the city's market positioning to include adventure tourism.
- Prioritise the delivery of the Cable Car linking Kings Park and Elizabeth Quay.
- Improve approval processes for new adventure tourism experiences such as segways, amphibious vessels, seaplanes and helicopter tours.
- Create new adventurous outdoor events that profile the city and attract participants and spectators.



Clockwise: Swan Jet, Seaplane on Swan, Perth Helitour

Opposite: The new Abyss rollercoaster at Adventure World



A short and long term view on Destination Perth.

Perth has taken long strides in a short space of time to mature as an urban destination. Its major competitive advantages lie around emerging city life and lifestyle, proximity to nature, quality food and wine and evolving adventure tourism sector.

Harnessing these qualities and building them in the short term will create a solid foundation for the evolution of long view projects such as Elizabeth Quay, Perth City Link, Perth Airport, Crown Perth and Scarborough Beach redevelopment, as well as the delivery of new transport infrastructure such as a train link to Perth Airport and light rail.

The continued investment, prioritisation and commitment by State Government to further develop Perth's tourist economy, infrastructure and attraction is necessary to sustain and build on existing strengths.

Ensuring Government policies and legislation are flexible and responsive to the needs of the local tourism market will be a key factor in managing the quality tourism service operators, businesses and workforce needed for the future growth of Perth.

Continued steps towards collaborative and consistent marketing and development of Perth's brand and visitor offering between State and Local Government and industry will be critical to the city's future destination success.



Fringe World Urban Orchard - Photo by Cam Campbell



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Images

Images of private tourism product are provided courtesy of the tourism operator.

Unless otherwise noted all images of Perth destinations, precincts and public attractions are courtesy of the Metropolitan Redevelopment Authority or Tourism Western Australia.



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