

An aerial photograph of Perth, Australia, at sunset. The city skyline is visible in the background with several prominent skyscrapers. The foreground shows a river with a boat and a park area with a colorful light structure. The sky is a mix of orange, red, and yellow.

# DESTINATION PERTH TOURISM DESTINATION MANAGEMENT PLAN

📍 PERTH CITY | BOORLOO









## ACKNOWLEDGEMENT OF COUNTRY

We acknowledge Aboriginal people as the traditional custodians of Western Australia and pay our respects to Elders past and present. We celebrate the diversity of Aboriginal West Australians and honour their continuing connection to Country, culture and community. We recognise and appreciate the invaluable contributions made by First Nations peoples across many generations in shaping Western Australia as a premier destination.

# LIST OF ACRONYMS

ACRONYM	DESCRIPTION
ACMA	Australian Communications and Media Authority
ACs	Aboriginal Corporations
AGWA	Art Gallery of Western Australia
AHA	Australian Hotels Associations WA
ATEC	Australian Tourism Export Council
BEP	Business Events Perth
BGPA	Botanic Gardens and Parks Authority
CCI	Chamber of Commerce
CoF	City of Fremantle
CoP	City of Perth
DBCA	Department of Biodiversity, Conservation and Attractions
DevWA	Development WA
DLGSC	Department of Local Government, Sport and Cultural Industries
DoF	Department of Finance
DoT	Department of Transport
DP	Destination Perth Regional Tourism Organisation
DPC	Department of the Premier and Cabinet
DPIRD	Department of Primary Industries and Regional Development
DPLH	Department of Planning, Lands and Heritage
DTWD	Department of Training and Workforce Development
FPA	Fremantle Port Authority
PDC	Peel Development Commission
PS	Private Sector
PTA	Public Transport Authority
RIA	Rottnest Island Authority
SLWA	State Library of Western Australia
SVTA	Swan Valley Tourism Alliance
TCWA	Tourism Council WA
TOs	Traditional Owners
TWA	Tourism Western Australia
VC	Visitor Centre
WAITOC	Western Australian Indigenous Tourism Operators Council
WAM	WA Museum
WAPC	Western Australian Planning Commission
WDC	Wheatbelt Development Commission
ZPA	Zoological Parks Authority





# KEY AGENCIES & THEIR ROLES

AGENCY	ROLES
Tourism WA	Tourism Western Australia (Tourism WA) is the State Tourism Organisation (STO) with a goal to grow tourism by marketing Western Australia as an incredible holiday and business events destination; attracting and promoting world-class sporting, cultural and arts events; and improving access, accommodation and tourism experiences.
RTO	Regional Tourism Organisations (RTOs) build strong relationships with Local Tourism Organisations (LTOs) and local governments to achieve better tourism outcomes and make the most of marketing activities. RTOs provide marketing opportunities to tourism businesses to encourage direct bookings, keep the industry informed, provide trade coaching and representation and facilitate industry development opportunities.
LGA	Local Government Authorities (LGAs) have an economic development function and often work closely with RTOs and LTOs to develop regional tourism. LGAs also directly manage or are closely involved with key tourism assets, such as visitor centres, caravan parks and reserves.
RDC	Western Australia has nine Regional Development Commissions (RDCs) that encourage, promote, facilitate and monitor development in their respective regions. RDCs also work collaboratively across all levels of government, multiple industries and with not-for-profit agencies to develop and deliver regional programs, policies and services.
TCWA	Tourism Council Western Australia (TCWA) is the peak body representing Western Australia's tourism businesses, industries and regions. The council promotes the value of tourism, facilitates sustainable tourism development and advocates industry policy on behalf of members.
DBCA	The Department of Biodiversity, Conservation and Attractions (DBCA) manage Western Australia's parks, forests and reserves to: conserve wildlife; provide sustainable recreation and tourism opportunities; protect communities and assets from bushfire; and achieve other land, forest and wildlife management objectives. DBCA conserves Western Australia's biodiversity, cultural and natural values in partnership with Traditional Owners (TOs).
MRWA	Main Roads WA (MRWA) is responsible for the state's road network. They work to ensure the roads meet the needs of the community, industry and stakeholders. They provide safe and reliable roads, bridges and paths throughout the state to improve accessibility.
DoT	The Department of Transport (DoT) provides and enables safe, accessible and efficient movement for Western Australia's economic and social prosperity.
WAITOC	Western Australian Indigenous Tourism Operators Council (WAITOC) is the peak representative for Aboriginal tours and experiences in Western Australia, promoting and supporting authentic cultural experiences at a state, national and international level.
WA Ports Authorities	Western Australia has five port authorities which facilitate trade within and through the port, are responsible for the safe and efficient operation of the port and for planning for future growth and development of port activities.
LTO	Local Tourism Organisations (LTOs) are responsible for promoting their local area and its members, and driving or participating in local tourism development initiatives.
Visitor Centre	Visitor Centres (VCs) provide destinations with an opportunity, once visitors are at the destination, to provide information, recommendations and trip planning functions.



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# INTRODUCTION

The Destination Perth (DP) Tourism Destination Management Plan (TDMP) establishes a vision for the region, supported by goals and priorities designed to drive tourism at all levels. The key priorities reflect product development trends and stakeholder insights, and are supported by abridged Regional Tourism Development Strategies (RTDS) to address supply, demand and capability gaps, ensuring a holistic approach to tourism across the region for the next 10 years.

The document has been informed by an analysis of the region's visitor economy, attractions and experiences, brands and destination marketing. Comprehensive stakeholder engagement was conducted to understand the opportunities and priority projects for tourism expansion. The projects are assessed at a regional and subregional level to ensure initiatives will have the most impact on sustainably growing the region's visitor economy.

Both the TDMP and RTDS documents address gaps in the following areas:

- Supply** including attractions, events, access and connectivity and infrastructure.
- Demand** including the region's positioning, markets and destination marketing.
- Capability** including workforce and skills development, funding and partnerships.

DP TDMP outputs:

- The TDMP, an overarching 10-year plan for the DP tourism region (this document).
- Three abridged RTDS establishing tourism projects and actions within the the Peel and Wheatbelt Development Commission regions, and the Perth metropolitan region.

For the purpose of this report, and to reflect the diversity of environments and offerings, the DP tourism region will be referred to as Perth and Surrounds.

It is important to note that many of the priorities identified in the documents are aspirational and unfunded. Their inclusion will provide industry and government stakeholders with the strategic direction to seek resourcing, if required, to deliver initiatives within their areas of responsibility.



# PLAN ON A PAGE

## VISION

Perth and Surrounds is effortlessly Australian, the most relaxed and naturally adventurous capital city region in the world.

## GUIDING PRINCIPLES

CONNECTIVITY

SUSTAINABILITY

ACCESSIBILITY

COLLABORATION

## 10-YEAR GOALS

Deliver a cohesive visitor experience by offering a diverse range of products and attractions.

Increase capacity and connectivity to strengthen access to and within the region.

Grow and diversify the accommodation offer by addressing gaps and priorities.

Establish Perth and Surrounds as a major hub for world-class sporting, cultural, business and arts events.

Develop and showcase Aboriginal tourism.

Foster collaboration across the tourism industry to grow the visitor economy and ensure its sustainability.

Strengthen the positioning of Destination Perth through collaborative marketing.

## INITIATIVES

- Encourage visitor dispersal by packaging products to appeal to key market segments.
- Enhance the visitor experience in key tourism precincts, including Victoria Quay, Kings Park, Perth Cultural Centre, Burswood Park, the Swan River, Rottneet Island, Fremantle, Swan Valley and the new Ocean Reef Marina.
- Develop new tourism experiences and attractions that leverage the natural assets of the region.
- Expand cultural, urban lifestyle, nature and wildlife, aquatic and coastal, and indulgent dining experiences.

- Support implementation of the Perth Airport Master Plan, and further establish Perth as the gateway to Australia through new aviation connections.
- Improve connections between tourism hubs and attractions.
- Support implementation of the WA Cruise Strategic Plan.
- Explore the feasibility of developing a linked river trail from Fremantle to Swan Valley.

- Increase the range of experiential accommodation such as eco, glamping, water-based, trail-based and farm stays.
- Address subregional gaps for short stay accommodation.
- Investigate opportunities for heritage assets to be adapted into tourist accommodation.
- Advocate for the development of affordable accommodation to support tourism/hospitality staff and international students.

- Support the redevelopment of the Perth Convention and Exhibition Centre to deliver major events and business events, including subregional pre/post tours and events.
- Support the development of world-class infrastructure to attract high-profile events.
- Deliver and expand unique homegrown events including EverNow.
- Develop events that focus on unique subregional strengths, including a major event in the Swan Valley.

- Support the sustainability of existing and development of new Aboriginal tourism offerings.
- Incorporate Aboriginal culture into all elements of the visitor experience.
- Support the delivery of the Aboriginal Cultural Centre in Perth City.
- Implement priority actions from the Jina Plan and subsequent action plans.

- Promote clear pathways from school to tourism and hospitality careers.
- Increase the pool of tourism and hospitality workers.
- Increase the capacity and capability of operators.
- Grow the number of accessible and ecotourism accredited operators.
- Progress investigations regarding interest for establishing a world class tourism and hospitality management school in Perth.

- Position Perth and Surrounds as the relaxed and naturally adventurous capital city region of WA.
- Establish collaborative and cohesive marketing initiatives across the region.
- Promote a Destination Perth Brand and Style Guide and relevant toolkits, aligned with the Tourism WA global brand.
- Grow the density of trade-ready, commissionable products to increase awareness of the region.

## PRODUCT DEVELOPMENT FOCUS

PEOPLE & CULTURE

AQUATIC & COASTAL

INDULGENT DINING

URBAN LIFESTYLE

NATURE & WILDLIFE



An aerial photograph of a rural landscape during the golden hour. The terrain is hilly and covered with sparse, dry-looking vegetation and scattered trees. A herd of cattle is visible grazing in a field in the lower foreground. The overall atmosphere is warm and hazy, with long shadows cast across the land.

**PART 1:**  
**TDMP VISION, GOALS & PRIORITIES**







# 10-YEAR VISION

Perth and Surrounds is effortlessly Australian, the most relaxed and naturally adventurous capital city region in the world. By 2033, Perth and Surrounds will be a globally recognised tourism destination, renowned for its diverse offerings, sustainable practices and immersive experiences.

- Experiences** Visitors can access a diverse range of high-quality attractions and experiences in close proximity. These experiences are supported by thematic links and easy connections.
- Industry** Tourism is a key economic driver and is recognised as an appealing career pathway. The whole community understands and supports the value and benefits of the visitor economy for its contribution to the way of life that locals enjoy within the region.
- Collaboration** Industry and government stakeholders work effectively and collaboratively through informed and dedicated processes that enable the development of infrastructure to support the visitor economy.
- Inclusivity** The visitor experience is inclusive, welcoming and safe. The Perth and Surrounds region is a place that feels like home, where lifestyle, character and sense of place remain and are valued by community and visitors.
- Sustainability** Perth and Surrounds is a responsible destination — a place where environment, community and culture play a fundamental role in supporting a sustainable visitor economy.









# 10-YEAR TOURISM GOALS & PRIORITIES

## 1. Deliver a cohesive visitor experience by offering a diverse range of products and attractions.

- Seek to enhance the visitor experience in key tourism precincts, including Victoria Quay, Swan River foreshore, Kings Park, Perth Cultural Centre, Burswood Park, Rottneest, Fremantle, Swan Valley and the new Ocean Reef Marina.
- Develop tourism experiences and attractions aligned with the naturally adventurous vision for the region, with a focus on unique assets such as the Swan River, waterways/natural assets of the Peel, the Perth Hills and Swan Valley trails, sunsets over the ocean, and the dark skies in the Wheatbelt.
- Diversify the product offering across the region through the development of cultural, urban lifestyle, nature and wildlife, aquatic and coastal, and indulgent dining experiences.
- Encourage visitor dispersal throughout the subregions by packaging products to appeal to key market segments.

## 2. Increase capacity and connectivity to support access to and within the region.

- Further strengthen Perth as the Western Gateway to Australia through the establishment of additional international aviation routes.
- Support visitor education and awareness of activities throughout Perth and Surrounds to remove perceived travel barriers and deliver a cohesive visitor experience.
- Advocate for improved connections between key tourism hubs and attractions across the region.

- Explore the opportunity to develop a river trail with a safe cycle/walking path connecting Fremantle to the Swan Valley.
- Support implementation of the Perth Airport Master Plan, including expanded international terminal, development of an airport hotel, consolidation of services at Airport Central and construction of a new runway.
- Support implementation of the WA Cruise Tourism Strategic Plan including upgrades to critical Port of Fremantle marine infrastructure.

## 3. Grow and diversify the accommodation offering by addressing gaps and priorities.

- Increase the range of experiential accommodation across the region that aligns to the naturally adventurous vision, focusing on high-quality eco, glamping, farm stays and trail-based offerings.
- Seek the development of new short stay accommodation offerings, including larger, branded hotels in Fremantle and Rockingham, unique and high-yield accommodation on Rottneest Island, trail-based accommodation in Dwellingup and the Perth Hills, and suitable tourist accommodation within the Ocean Reef Marina precinct, and additional offerings in Scarborough.
- Facilitate the conversion of heritage assets for tourism accommodation.
- Seek private sector investment in signature/unique accommodation in and around national parks and reserves.
- Advocate for the development of affordable accommodation to support tourism/hospitality workers and international students to address workforce challenges.



#### 4. Establish Perth and Surrounds as a major hub for world-class sporting, cultural, business and arts events.

- Continue to attract a diverse range of blockbuster events that drive visitation and support a year-round calendar of events that enhance the vibrancy of the Perth and Surrounds region.
- Support the redevelopment of the Perth Convention and Exhibition Centre to enable Perth to host major international events. Leverage large business events with pre/post events and tours to encourage subregional dispersal.
- Support the development of world-class infrastructure including cultural, entertainment and sporting precincts to assist in attracting high-profile events to the Perth and Surrounds region.
- Deliver and expand homegrown events including EverNow in Perth City.
- Develop and promote events that focus on unique subregional attributes and encourage visitor dispersal.

#### 5. Develop and showcase Aboriginal tourism.

- Support the development of new, and the rejuvenation of existing, Aboriginal tourism offerings throughout the region.
- Facilitate the inclusion of Aboriginal tourism experiences in mainstream tourism offerings to drive demand and awareness for local product.
- Incorporate Aboriginal culture into all elements of the visitor experience, including dual naming and cultural wayfinding.
- Support the delivery of the Aboriginal Cultural Centre in Perth City.
- Implement priority actions from the Jina: WA Aboriginal Tourism Action Plan 2021–2025 (or future editions).

#### 6. Foster collaboration across the tourism industry to grow the visitor economy and ensure its sustainability.

- Identify and promote clear pathways from school to tourism and hospitality careers and raise the profile of the industry as a positive career opportunity.
- Increase the pool of tourism and hospitality workers by implementing targeted workforce development strategies.
- Increase the capacity and capability of operators through industry workshops, focusing on best practice approaches, improving visitor experience, developing new products, and retaining and upskilling workers.
- Grow the number of accessible and ecotourism accredited operators.
- Progress investigations regarding interest for establishing a world class tourism and hospitality management school in Perth.

#### 7. Strengthen the positioning of DP through collaborative marketing within and across the region.

- Position Perth and Surrounds as the relaxed and naturally adventurous capital city region of Western Australia.
- Establish collaborative and cohesive marketing initiatives across the Perth and Surrounds region that align to the Tourism WA global brand and leverage the region's experience pillars to encourage dispersal throughout the subregions.
- Develop a DP Brand and Style Guide and relevant toolkits, which utilises and aligns with the Tourism WA global brand.
- Grow the density of trade-ready, commissionable products to increase awareness of the region.











# PERTH & SURROUNDS TOURISM REGION OVERVIEW

The Perth and Surrounds region is one of WA's five tourism regions, bordered by Australia's South West to the south, Australia's Golden Outback to the east, and Australia's Coral Coast to the north. Perth and Surrounds is a destination in its own right, a gateway to Australia and to WA's regions.

The vision for Perth and Surrounds is to embrace its naturally adventurous spirit by offering experiential activities, attractions and events that make the most of the region's natural assets. This includes providing diverse and accessible adventure opportunities that cater to different market needs.

For the purpose of this TDMP, the Perth and Surrounds region has been divided into seven distinct, diverse tourism subregions: Perth City; Swan Valley; Perth Hills; Avon Valley; Sunset Coast; Fremantle and Rottneest; and Peel and Rockingham. These subregions encompass the following Local Government Areas (LGAs) and State Government Authorities:

- **Perth City**, including Bayswater, Belmont, Canning, Melville, Nedlands, Perth, Peppermint Grove, South Perth, Subiaco, Victoria Park and Vincent.
- **Sunset Coast**, including Cambridge, Cottesloe, Claremont, Gingin, Joondalup, Mosman Park, Stirling and Wanneroo.
- **Fremantle and Rottneest**, including Cockburn, East Fremantle, Fremantle and Rottneest Island Authority.

- **Peel and Rockingham**, including Boddington, Kwinana, Mandurah, Murray, Serpentine Jarrahdale, Rockingham, Wandering and Waroona.
- **Perth Hills**, including Armadale, Gosnells, Kalamunda, and Mundaring.
- **Swan Valley**, including Bassendean, Chittering and Swan.
- **Avon Valley**, including Beverley, Brookton, Goomalling, Northam, Toodyay, Victoria Plains, and York.

The Perth and Surrounds subregions offer a diversity of experiences in close vicinity to the city centre, with experience pillars surrounding five core themes of urban lifestyle, aquatic and coastal, nature and wildlife, indulgent dining, and people and culture. These experiences centre around the fusion of urban energy and natural serenity, with history and heritage, outstanding urban parks, the aquatic wonderland of the Swan River, 197 kilometres of coastline boasting white sandy beaches and sunset viewing, wildflowers, food and drink, and many tracks and trails.

In the year ending December 2023, the Perth and Surrounds region welcomed over 5.1 million overnight visitors.<sup>1</sup>

Visitation to the Perth and Surrounds region has traditionally been dominated by the intrastate market. In the year ending December 2023,

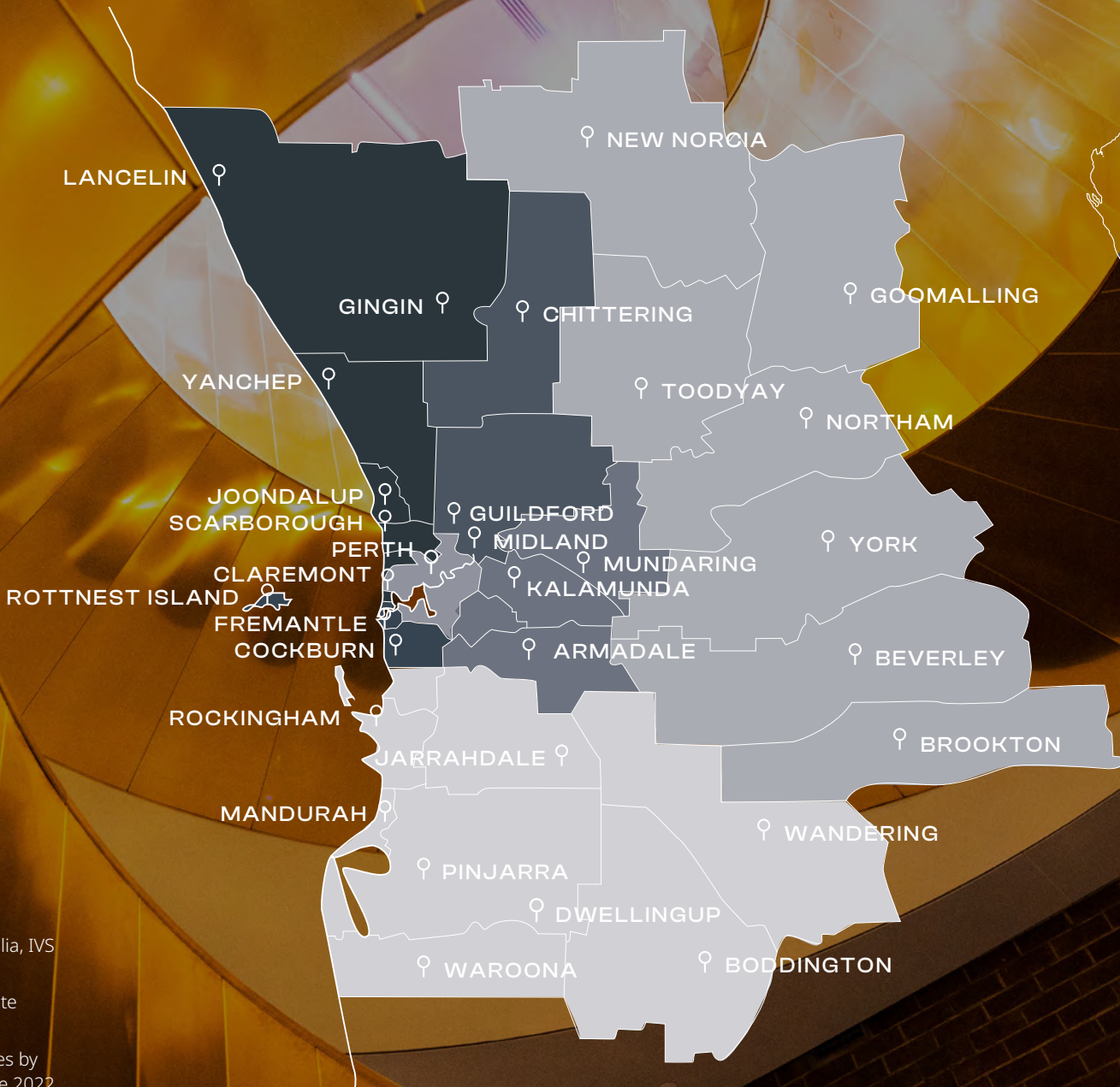
approximately 60 per cent of overnight visitors were from within the state, although they commanded only 43 per cent of overnight spend. International visitors are lucrative for the region, with 14 per cent of visitors producing 26 per cent of spend in the same period. Likewise, the interstate market comprised 26 per cent of overnight visitation and contributed approximately 30 per cent of overnight spend.<sup>1</sup>

In 2021-22, tourism (direct and indirect) in the Perth and Surrounds region was worth \$3.53 billion by Gross Value Added (GVA), compared with a combined total for regional WA of \$3.49 billion<sup>2</sup>. In the same period, the tourism industry in Perth and Surrounds directly employed 30,800 people, representing 2.5 per cent of the region's employment. The tourism industry in Perth and Surrounds is largely comprised of small to micro businesses, with a majority employing fewer than five people.<sup>3</sup>

At the time of preparing this document, there were approximately 16,859 hotel rooms and over 5,000 private short stay listings in the Perth and Surrounds region, with a high proportion of 4.5-star accommodation offerings, according to both the Australian Accommodation Monitor and Inside Airbnb.



- SUNSET COAST
- FREMANTLE & ROTTNES
- SWAN VALLEY
- PERTH HILLS
- PERTH CITY
- AVON VALLEY
- PEEL & ROCKINGHAM



<sup>1</sup>Tourism WA, Sourced from Tourism Research Australia, IVS and NVS 2022, 2023.  
<sup>2</sup>Tourism Research Australia, Regional Tourism Satellite Accounts 2021–22.  
<sup>3</sup>Tourism Research Australia 2022, Tourism Businesses by employment size In Australian Tourism Regions, June 2022.



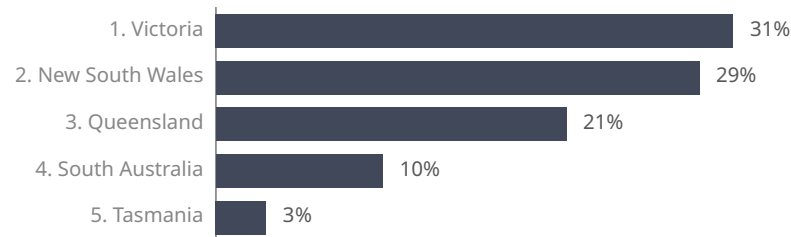
# VISITOR ECONOMY

## VISITOR PROFILE (2023)

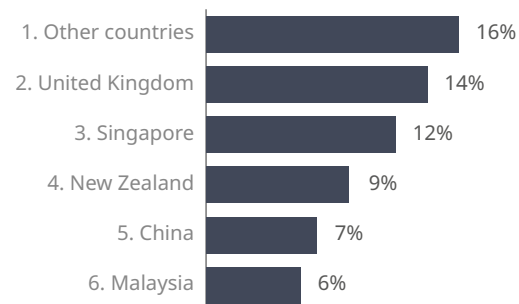
### 5.1 million overnight visitors spent a total of \$7.3 billion

- 60 per cent intrastate (average length of stay 2.7 nights)
- 26 per cent interstate (average length of stay 5.3 nights)
- 14 per cent international (average length of stay 29.5 nights)

## TOP 3 HOME STATE/TERRITORY (2022+23)



## INTERNATIONAL MARKETS HOME COUNTRY (2023)



The Perth City subregion receives higher visitation, yield and visitor nights than any other subregion. Increasing the length of stay for visitors to Perth City is a crucial goal.

After Perth City, the Peel and Rockingham and Sunset Coast subregions receive the second and third highest number of day-trip visitors. However, these subregions are less able to translate visitation into economic benefit through visitor spend. This is possibly reflective of the lower number of international visitors and higher proportion of the visiting friends and relatives market within these areas.

As highlighted in Table 1, the Avon Valley, Perth Hills and Swan Valley subregions attract fewer visitor, nights and spend than other subregions. Encouraging visitor dispersal to the outer subregions of Perth and Surrounds is a key objective of this TDMP.

Table 1 shows a comparison of the average of visitors, nights and spend in each subregion for 2022+2023. Due to sample sizes, international data is reflective of YE 2023. Highlighted figures in green indicate the top scores, yellow/orange for mid scores, and red for the lowest scores across the region.

Np = not publishable due to small sample size.









SUBREGION	MARKET*	VISITORS (000)	NIGHTS (000)	EXPENDITURE (\$M)	SPEND PER NIGHT (\$)	SPEND PER VISITOR (\$)	AVG. LENGTH OF STAY (NIGHTS)
PERTH CITY	International	512	11,859	1,265	107	2,471	23.2
	Domestic overnight	2,211	8,137	3,662	450	1,656	3.7
	<b>Total</b>	<b>2,723</b>	<b>19,996</b>	<b>4,927</b>	<b>246</b>	<b>1,809</b>	<b>7.3</b>
	Domestic day	4,176	N/A	707	N/A	169	N/A
SUNSET COAST	International	115	4,761	288	60	2,504	41.4
	Domestic overnight	580	1,604	338	211	583	2.8
	<b>Total</b>	<b>695</b>	<b>6,365</b>	<b>626</b>	<b>98</b>	<b>901</b>	<b>9.2</b>
	Domestic day	2,838	N/A	318	N/A	112	N/A
PEEL & ROCKINGHAM	International	65	1,725	111	64	1,708	26.5
	Domestic overnight	868	2,374	356	150	410	2.7
	<b>Total</b>	<b>933</b>	<b>4,099</b>	<b>467</b>	<b>114</b>	<b>501</b>	<b>4.4</b>
	Domestic day	4,109	N/A	401	N/A	98	N/A

Table 1: Distribution of visitors, nights and spend across the region. (domestic data 2022+2023 average, international data YE December 2023).

NOTE: Due to small sample sizes, Domestic has been calculated as a 2 year average of 2022 + 2023. International is individual years. Totals are a sum of these 2 different methodologies so should be used with caution.

Np = not publishable due to small sample size. Source: Tourism Research Australia IVS and NVS.



SUBREGION	MARKET*	VISITORS (000)	NIGHTS (000)	EXPENDITURE (\$M)	SPEND PER NIGHT (\$)	SPEND PER VISITOR (\$)	AVG. LENGTH OF STAY (NIGHTS)
FREMANTLE & ROTTNEST	International	81	1,471	127	86	1,568	18.2
	Domestic overnight	414	1,401	374	267	903	3.4
	<b>Total</b>	<b>495</b>	<b>2,872</b>	<b>501</b>	<b>174</b>	<b>1,012</b>	<b>5.8</b>
	Domestic day	1,215	N/A	151	N/A	124	N/A
PERTH HILLS	International	39	1,222	80	65	2,051	31.3
	Domestic overnight	171	423	99	234	579	2.5
	<b>Total</b>	<b>210</b>	<b>1,645</b>	<b>179</b>	<b>109</b>	<b>852</b>	<b>7.8</b>
	Domestic day	1,283	N/A	112	N/A	87	N/A
SWAN VALLEY	International	23	756	48	63	2,087	32.9
	Domestic overnight	184	453	105	232	571	2.5
	<b>Total</b>	<b>207</b>	<b>1,209</b>	<b>153</b>	<b>127</b>	<b>739</b>	<b>5.8</b>
	Domestic day	1,225	N/A	191	N/A	156	N/A
AVON VALLEY	International	Np	Np	Np	Np	Np	Np
	Domestic overnight	284	692	74	107	261	2.4
	Domestic day	<b>774</b>	<b>N/A</b>	<b>63</b>	<b>N/A</b>	<b>81</b>	<b>N/A</b>



# MARKET SEGMENTATION & POSITIONING

## MARKET DATA & SEGMENTATION

Source market and market segmentation data and practice are generally limited to the top-line definitions (domestic day, domestic overnight, international overnight) with limited data on what drives visitor demand and potential niche or emerging markets.

## HIGH-YIELDING TRAVELLERS

Tourism WA focuses its marketing activities on targeting the High-Yield Traveller (HYT) segment, which is predominantly visitors from key international markets and interstate markets.

HYTs will differ for each destination and tourism experience within the Perth and Surrounds region and granular data is not available to identify these for each one. For WA, HYTs are broadly defined as travellers who:

- are not challenged by long-haul travel;
- are considering a holiday to WA;
- enjoy nature and wildlife, aquatic and coastal, and food and wine experiences; and
- have above-average spending on holiday.

For WA, the important factors for a HYT when choosing a long-haul destination include world-class nature and wildlife, a safe and secure destination, good food, wine, local cuisine and produce, world-

class coastlines, beaches and marine wildlife, and rich history and heritage. The most appealing WA experiences are outdoor/nature, observing wildlife/marine life, coastal/beach, engaging with wildlife/marine life, and food and wine experiences.

Recognising that intrastate visitors are a significant and growing market for the Perth and Surrounds region, it is essential to consider these visitors alongside targeting HYTs.

Priorities and actions in the TDMP and associated RTDS documents are therefore designed to reflect the interests and expectations of these markets and align with both WA's and the Perth and Surrounds tourism region's assets.

## DESTINATION MARKETING

Current destination marketing responsibilities for key markets are outlined as follows:

- Tourism WA's activity currently focuses on attracting HYTs from international and interstate markets.
- The DP RTO is primarily responsible for intrastate markets and supporting Tourism WA in interstate markets.
- LTOs are responsible for marketing the subregions to intrastate markets.

- Visitor Centres are responsible for providing information to visitors once they arrive at a destination, that encourages them to stay longer, spend more money, experience more attractions and revisit.

## GLOBAL TOURISM WA BRAND — WALKING ON A DREAM

Walking On A Dream is Tourism WA's global tourism brand, which aims to elevate the profile of WA as a unique destination within a highly competitive global marketplace to turbocharge visitation and boost the state's economy.

The Walking On A Dream creative concept positions WA as a wondrous, otherworldly, dreamlike and aspirational destination. Walking On A Dream weaves the themes of Time, Space, Connection and Freedom into the WA narrative. These thematic pillars represent key attributes that global travellers seek from a destination in a post-pandemic world.

The Walking On A Dream creative concept provides uniqueness to Tourism WA's marketing and communications to make Western Australia shine as an aspirational, memorable and desirable destination for leisure and business travel, from now and into the future.



The global Tourism WA brand is a vital element of the framework to inform demand-side actions and priorities identified within the TDMP.

## DESTINATION PERTH BRAND POSITIONING

Capitalising on the unique assets and qualities of the Perth and Surrounds region, the Destination Perth RTO promotes a diverse range of experience offerings within its subregions:

- Indian Ocean sunset at one of 19 metropolitan world-class beaches;
- Coastal and waterfront dining/bar experiences;
- Rottneest Island including beaches, quokkas, cycling, walking and boat cruises;
- Indulgent food and drink in the Swan Valley;
- Aboriginal walking tours in Elizabeth Quay, Kings Park, Fremantle, Rockingham, Burswood Peninsula, Toodyay or Rottneest Island;
- The eclectic and spirited port city, Fremantle and the World Heritage listed Fremantle Prison;
- Aquatic wildlife encounters and island adventures at the Shoalwater Islands Marine Park at Rockingham;
- Wellness, hiking, mountain biking, wine, cider and farm produce

- Otherworldly hot air ballooning and vintage towns in Avon Valley;
- Perth City, nestled into the Swan River, including Kings Park, one of the world's largest inner-city parks, as well as events and festivals, the majestic Boola Bardip museum, galleries, laneways and shopping; and
- Wild dolphins dancing in the waterways, venetian-like canals, waterways teeming with birdlife, world-class biking and hiking trails and natural landscapes in Mandurah and Peel.

The Tourism WA brand platform provides an opportunity for Perth and Surrounds to build aspiration and consideration in high yield audiences. A significant element of leveraging the Walking On A Dream global brand is the development and promotion of a Destination Perth Brand and Style Guide that aligns to the overarching global brand to strengthen connections and enhance consumer awareness.





# ACCESS

Access plays a fundamental role in determining the success of a region's tourism industry. It refers to the physical connectivity and ease of travel within and to the destination, encompassing various modes of transportation such as air, road, rail and sea. The availability of efficient and well-connected transportation infrastructure significantly influences the attractiveness of a region to tourists.

Perth's position as the capital city and gateway to WA amplifies the critical importance that accessibility has to the success and growth of the state's tourism industry. The following is an outline of the physical connections to and within the Perth and Surrounds region.

## AVIATION

Perth is a significant entry point to Australia, with Perth Airport offering direct flights from the UK, Europe, Middle East, South Africa, New Zealand and Asia. Planned investment of \$2.5 billion will support the consolidation of all commercial air services into the Airport Central Precinct by 2031, including expanding international facilities, developing a new terminal and airport hotel, and adding a third runway. The redevelopment is expected to increase capacity into Perth by an additional 4.4 million seats.

Flights to Perth from Sydney, Melbourne, Brisbane, Canberra, Adelaide, Hobart and Darwin operate regularly. The flight time from Sydney to Perth averages four hours.

The Western Australian Government implemented the Regional Airfare Zone Cap scheme in July 2022. This initiative allows WA regional residents to access capped airfare for personal travel on eligible routes to and from Perth. The scheme supports intrastate visitation to and from Perth and provides the opportunity for further dispersal within the Perth and Surrounds region.

## SELF-DRIVE

Freeways, highways and arterial roads in Perth form the basis of the road network within the Perth and Surrounds region. State routes in Perth are allocated to the main routes connecting the city and there are a number of roads that are designated as tourist drives through areas of scenic or historic significance.

There are currently two major highways that connect Perth with the rest of Australia. Self-drive visitors can enter the state via the Great Northern Highway near Kununurra and travel south to Perth. Alternatively, the more direct route from Melbourne or Sydney travels through Adelaide and across the Nullarbor Plain on the Eyre Highway and the Great Eastern Highway. The planned sealing of the Outback Way by 2030 will link Winton in Queensland, to Laverton in WA's Golden Outback, and provide a third sealed interstate route for travellers.





## CRUISE

Cruise travel is an important contributor to the tourism industry in WA with solid growth potential. Perth and other parts of the state are featured on world cruise itineraries as part of Australian coastal cruise packages, making it a key gateway to the cruising waters of Asia, Africa and Europe.

In 2011, global passenger volume was 20.5 million. In 2019, this figure had grown to 29.7 million, representing an average annual growth rate of 4.7 per cent. This number is projected to grow to 39.5 million by 2027, an increase of 33 per cent.

In 2018-19, the cruise industry in Western Australia generated approximately \$109.3 million, resulting in an economic output of \$228.9 million and supporting nearly 850 jobs. In the same year, the industry recorded a total of 244 cruise ship visit days (over 35 passengers) increasing from 195 days in the previous period.

Visiting cruise ships berth at the Fremantle Passenger Terminal, Australia's largest cruise terminal. In 2018-19, Fremantle welcomed 35 cruise ships (of 100 or more passengers), generating an economic output of over \$188 million. In 2022-23, Fremantle Port received 33 cruise ship visits bringing in 67,492 passengers and almost 20,000 crew.

Attracting more seasonal home-ported vessels to Fremantle, including mid-size, larger and expedition ships will continue to grow this sector and its economic benefit over the next decade.



## RAIL

The public Transperth rail service links Perth City with the other subregions, with regular trains running to the north, south and east. The WA Government METRONET project, currently underway, will deliver additional rail stations with connections to many suburban areas to further improve access within Perth and Surrounds. As part of this project, the Airport Line, which opened in 2022, provides a direct access point from the airport to the city centre.

The AvonLink train line travels from Midland Station to Northam Train Station via Toodyay in just over an hour. The Bunbury Australind Train connects Perth to Bunbury in the South West region in a two-hour train journey via a number of towns in the Peel region.

Outside of public transportation, the Indian Pacific train connects the eastern states markets of Sydney, Melbourne and Adelaide with Perth on a three-day epic rail journey through vineyards, riverlands and across the Nullarbor Plain. Possible opportunities for relocating the terminus to extend the route to Fremantle could provide additional appeal for tourists and should be explored into the future.

## BUSES

Transperth operates free CAT buses on set routes within the Perth City subregion, a valuable asset to the visitor experience. Paid buses also operate across the wider Perth and Surrounds region through an extensive public transport network which covers many routes.

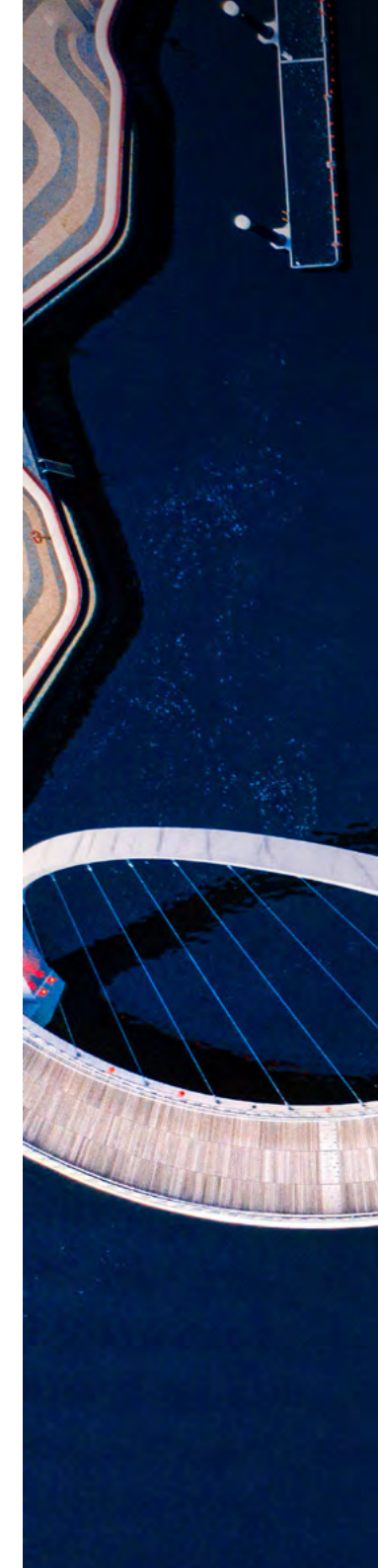
Private coach operators offer tours throughout Perth and Surrounds to Fremantle, Avon Valley and the Swan Valley and into neighbouring areas, including the Pinnacles in the Coral Coast region. Coach offerings on Rottnest Island provide visitors with a scenic bus ride including stops at iconic beaches, bays and attractions. There is also the option for visitors to utilise a hop-on-hop-off bus within the Perth city centre to see a range of city-based attractions, including Kings Park.

## FERRIES

Transperth ferry services operate on the Swan River, running from Elizabeth Quay in Perth City to Mends Street Jetty in South Perth in an approximate 10-minute journey. Private ferries also operate with a wide range of cruise options from Perth to Fremantle and Rottnest Island or upstream towards the Swan Valley wine region. Expansion of the ferry system to link additional locations through public or private transport options is another significant opportunity for the Perth and Surrounds region.

## TRAILS & ACTIVE TRANSPORT

Significant investment in walking, cycling, mountain biking and active transport infrastructure has occurred in Perth City and some areas of the surrounding subregions. To fully capitalise on this investment from a tourism perspective and facilitate region-wide connectivity, an audit of the connectivity of this network with other modes of transport is required.









# ACCOMMODATION

Accommodation refers to lodging options like hotels, resorts, caravan parks, campgrounds and short stay rentals. It is essential for tourism as it provides a comfortable base for visitors to explore the region’s attractions. Accommodation infrastructure drives destination development, attracting more tourists and encouraging investment. Good accommodation enhances visitor experiences and satisfaction. It also has significant economic importance, generating revenue, creating jobs and stimulating other sectors. The availability and quality of accommodation can influence the length of tourists’ stays, leading to increased spending and benefitting local businesses.

The following table provides an overview of accommodation offerings in the subregions of Perth and Surrounds, collated using the Australian Accommodation Monitor (AAM) database (which includes hotels, motels, serviced apartments and cabins in caravan parks of 10 or more rooms) and Inside Airbnb. Reliable data is not available for campgrounds and caravan sites. Please note there may still be discrepancies in this data, and the WA Government is progressing initiatives to better collect data on the accommodation market.

PERTH & SURROUNDS OVERVIEW		
<p>Perth and Surrounds is the most established of all the tourism regions in WA. Roughly 77 per cent of hotels are inside the Perth City subregion. Overall in the region there are 175 properties; 17 of which are economy level, 38 midscale, 31 upper-midscale, 48 upscale, 28 upper-upscale and 13 luxury properties. Roughly 50 per cent of the accommodation offering is above 3.5 stars. Furthermore, more than half (54 per cent) of all properties are independently owned and operated.</p> <p>Approximate total of hotel beds 16,966 and private short stay homes/rooms 5,924.</p>		
SWAN VALLEY	PERTH HILLS	PEEL & ROCKINGHAM
<p>There are seven properties listed on the AAM located in the Swan Valley subregion. The offering in the subregion ranges from midscale to upscale with an even split between independent and chain properties. The subregion primarily offers apartments and caravan parks/campgrounds with most located in The Vines, Midland, Caversham and Middle Swan.</p> <p>Approximate total of hotel beds 361 and private short stay homes/rooms 211.</p>	<p>The accommodation offering in the Perth Hills is predominantly caravan parks/campgrounds with a small amount of capacity in motels and bed-and-breakfasts. There is a lack of upscale or unique/experiential accommodation within the Perth Hills. A significant opportunity is accommodation for tour groups, which would allow the subregion to fully capitalise on its nature-based assets through multi-day hiking/biking tours. This would also assist in attracting overnight visitation and increasing length of stay.</p> <p>Approximate total of hotel beds 130 and private short stay homes/rooms 280.</p>	<p>The Peel and Rockingham subregion is supported by 19 properties, with 17 of them being independently owned and operated. There is an even distribution of accommodation standards, ranging from economy to upscale offerings. Most of the accommodation is located in the Mandurah area. There is a similar availability of private short stay rental properties, with over 500 of the homes/rooms clustered around Mandurah.</p> <p>Approximate total of hotel beds 918 and private short stay homes/rooms 866.</p>

Table 2: Destination Perth accommodation profile (2022)

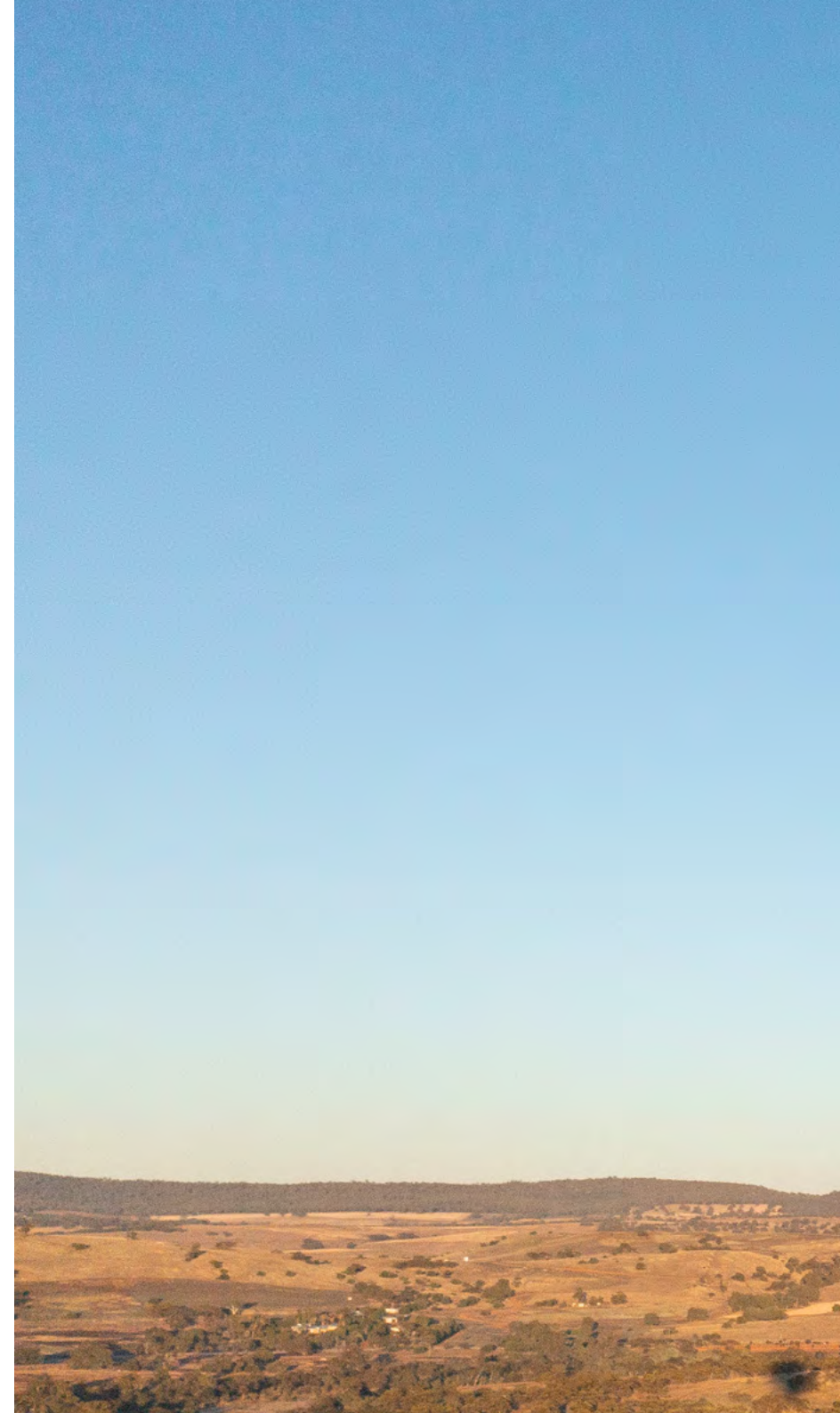


PERTH CITY	FREMANTLE & ROTTNES	SUNSET COAST	AVON VALLEY
<p>The accommodation offering in Perth City is the most advanced of all of the Perth and Surrounds subregions. There are seven economy options, 17 midscale, 24 upper midscale, 33 upscale, 19 upper upscale and eight luxury options. There is a good mix of independently owned offerings (48) and branded or chain properties (59). There are 70 properties located in the city centre, making up the majority of beds. Most of the capacity is located in the city centre, East Perth, Burswood, Ascot, West Perth, South Perth and Northbridge.</p> <p>Approximate total of hotel beds 13,160 and private short stay homes/rooms 1,919.</p>	<p>Fremantle and Rottnest have a significantly smaller pool of rooms and hotels than Perth City. Considering the high visitation to the subregion, further accommodation development would be beneficial. A majority of the properties in the Fremantle and Rottnest subregion offer an upper-midscale or higher standard accommodation. Of the 18 properties listed, 12 of them are independently operated, demonstrating an opportunity for the development of larger, branded hotels.</p> <p>Rottnest Island's offering predominantly consists of short stay, self-contained accommodation in the form of cottages and chalets, as well as two hotels and glamping/camping. There is opportunity to grow both lower end and iconic/unique accommodation categories on Rottnest Island. Further to the offering on the Island, visitors may stay overnight on their own vessels by booking a beach pen, jetty pen and/or swing mooring.</p> <p>Approximate total of hotel beds 1,154 and private short stay homes/rooms 790.</p>	<p>The Sunset Coast incorporates some of the region's premier coastal locations and is the beachside accommodation hub of Perth and Surrounds. Of the 18 properties in the Sunset Coast subregion, half of these are of a four-star and above experience. Most of the offerings are located in Scarborough, Innaloo, Gwelup, Sorrento, Hillarys, Connolly and Joondalup, being primarily apartments, hotels and resorts. The Sunset Coast predominantly consists of locally owned and operated hotels. However, the subregion has more private short stay listings, totalling over 1,700 rooms. This indicates a potential opportunity for the development of more commercial properties in the subregion.</p> <p>Approximate total of hotel beds 1,169 and private short stay homes/rooms 1,781.</p>	<p>Currently there are only three properties listed in the AAM in the Avon Valley, all of which are of an economy standard (three-star or less). These properties have a total of 74 hotel beds. There are also a number of smaller properties throughout the subregion, including bed-and-breakfasts, tiny cabins and cottages. However, of the seven LGAs within the Avon Valley subregion, two have no hotel beds and no private short stay rooms on offer.</p> <p>There is significant opportunity within the Avon Valley to refurbish existing heritage buildings into high-quality, boutique accommodation that delivers a point of difference for the subregion to attract new markets, including HYTs.</p> <p>Approximate total of hotel beds 74 and private short stay homes/rooms 101.</p>



# ACTIVITIES, ATTRACTIONS & EVENTS

Activities, attractions, and events play crucial roles in tourism industry development and the depth, diversity and uniqueness of these experiences significantly influence a visitor's decision when considering a holiday destination. Providing a range of activities, attractions and events can enhance the visitor experience, generate economic benefits and employment opportunities, differentiate a destination and increase both length of stay and visitor dispersal. They also provide communities with opportunities to actively participate in tourism and share their culture, heritage and traditions with visitors.







AURORA  
*Spirit of Ballooning*



## ACTIVITIES & ATTRACTIONS

Key attractions within the Perth and Surrounds region include the Swan River, Perth beaches, Kings Park and Botanic Garden, Rottnest Island, Shoalwater Islands Marine Park, WA Museum Boola Bardip, Elizabeth Quay, World Heritage listed Fremantle Prison, Optus Stadium, Thomas Dambo Giants of Mandurah, Fremantle Markets, Matagarup Bridge, The Bell Tower, Hillarys Boat Harbour, Perth Mint, Perth Zoo, Caversham Wildlife Park, Omeo Wreck and Coogee Maritime Trail, wildflower season, and the caves and koalas of Yanchep National Park.

The region also offers visitors access to a diverse range of activities within an hour of the city, including: hot air ballooning in the Avon Valley; the Matagarup Bridge Zip+Climb in Perth City; swimming with dolphins and sea lions in Rockingham; whale watching; city walking tours; nature-based and ecotourism experiences throughout the Peel region; Swan River cruises; surfing/paddle boarding on the Sunset Coast; skydiving off Rottnest; culture and maritime history in Fremantle; mountain biking and hiking on world-class trails in Dwellingup and the Perth Hills; winery, brewery and distillery tours and tastings in the Swan Valley; wellness experiences including forest bathing, yoga, spas and treatments; and a variety of markets showcasing local produce and quality artisan goods.

## EVENTS

Events play a valuable role in enhancing the vibrancy of a destination, giving visitors a time-certain reason to visit, disperse across the region or stay an extra night in a location. Perth is the number one location for events in the state, given its prominence as the capital city and substantial residential population which supports and justifies investment in major events, major national and international sporting matches and championships. Tourism WA pursues a range of events for Perth and Surrounds to act as visitation drivers and position the state as a world-class sporting, cultural and arts events destination. These events are complemented by supporting activities throughout the subregions, often with a community or participation focus. These events occur more frequently and attract both local residents and visitors.

While the majority of events are held during the summer months, efforts should continue to be made to distribute visitation throughout the winter season to mitigate seasonality impacts. Continuing to attract a calendar of year-round sporting events at venues such as HBF Park, RAC Arena and the world-class Optus Stadium, as well as pursuing development of new world-class infrastructure should be a priority over the next decade.

Business events, such as meetings, conferences, trade shows and exhibitions, also contribute significantly to attracting visitors to a destination. These events generate substantial economic benefits for the state, as delegates often spend up to five times more than the average leisure visitor on venues, hotels, hospitality and retail businesses. Business events are a highly competitive market, with WA competing against domestic and international competitors to secure these types of events for the state, a role currently undertaken by Business Events Perth (BEP). The need for a new convention centre to accommodate major conventions has been identified, as the current Perth Convention and Exhibition Centre is not of sufficient capacity to attract events of scale. It is the smallest and oldest of all convention centres in Australia and is a substantial barrier to Perth being able to grow its events calendar.







## DEVELOPMENT PILLARS

The following development pillars have been selected to delineate essential areas of focus for the sustainable growth and success of the Perth and Surrounds tourism region. A desktop analysis of the currently marketed activities, attractions and events in the Perth and Surrounds region was undertaken to determine the destination maturity of the subregions.

The Fremantle and Rottnest, Perth City, and Peel and Rockingham subregions are the most well-established in terms of bookable tourism product, with signature

elements that should be capitalised on through strategic marketing efforts that may drive visitation. There are emerging opportunities in the Avon Valley, Sunset Coast and Swan Valley subregions, which highlights a need for development of heritage, Aboriginal culture, and adventure products in these subregions. The Perth Hills is the most underdeveloped, when considered alongside the other subregions, and requires further development of bookable product across all development pillars to leverage its assets, particularly in nature and adventure product.

Over the TDMP's 10-year timeframe, the future product development focus, when established and resourced, should continue to strengthen the five shared product pillars across the Perth and Surrounds region and enable differentiation at a subregional level. Product development resources and focus should align with and reinforce each subregion's unique brand positioning and future marketing focus.

ACTIVITIES, ATTRACTIONS & EVENTS	AVON VALLEY	FREMANTLE & ROTTNEST	PEEL & ROCKINGHAM	PERTH CITY	SUNSET COAST	SWAN VALLEY	PERTH HILLS
NATURE/BIODIVERSITY	D	S	S	E	E	D	D
ABORIGINAL CULTURE	D	E	D	E	D	E	D
HERITAGE	E	S	E	S	D	E	D
ADVENTURE	E	E	E	E	E	D	D
EVENTS & FESTIVALS	E	S	E	S	E	E	D

### LEGEND

- S SIGNATURE:** Product well established and represented in destination marketing.
- E EMERGING:** Product is established, growing representation in destination marketing.
- D DEVELOPMENT OPPORTUNITY:** Limited established product.

Table 3: Development pillars DP



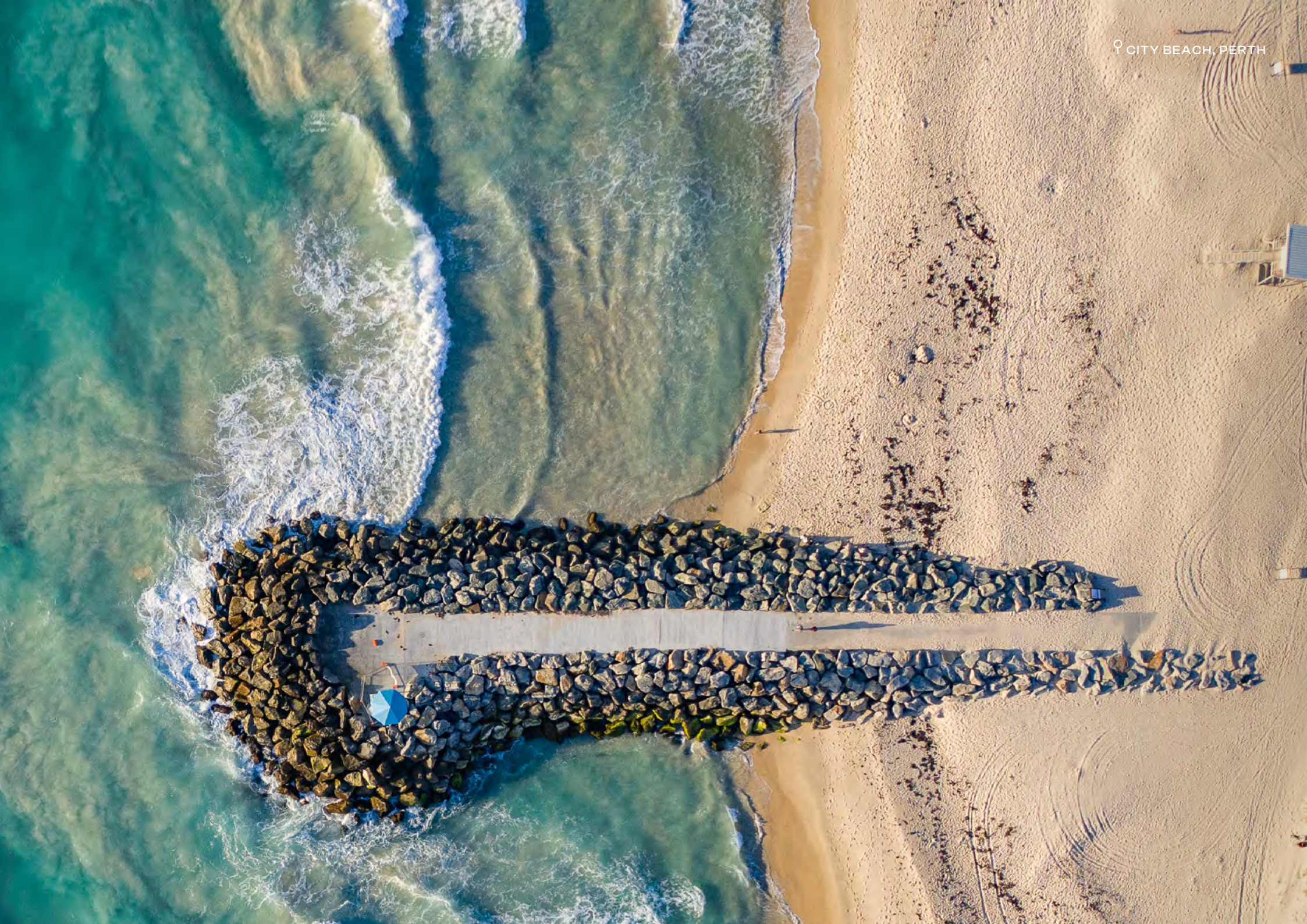




An aerial photograph of a coastline, showing a dark, textured landmass on the left and a lighter, more uniform area on the right, possibly representing water or a different terrain. The text is overlaid on the dark landmass.

**PART 3:**  
**INSIGHTS INFORMING THE TDMP**







# DESTINATION MATURITY OF THE PERTH & SURROUNDS SUBREGIONS

The destination maturity of the Perth and Surrounds subregions has been determined through analysis of the current visitor economy, market awareness, access, accommodation, activities, attractions and events. According to Butler's Tourism Area Life Cycle Model (1980), tourism destinations go through different stages of maturity, including exploration, involvement, development, consolidation, stagnation, and decline or rejuvenation. A mature tourism destination typically exhibits a well-established and diverse range of offerings, well-developed tourism infrastructure, and effective destination management practices.

Understanding the maturity level of a destination helps in identifying its strengths, weaknesses and potential areas for improvement to attract visitation and ensure the sustainability of the tourism sector. The following assesses the destination maturity of the subregions in Perth and Surrounds, identifying the areas required for improvement to enable the subregions to move upwards in the tourism life cycle.





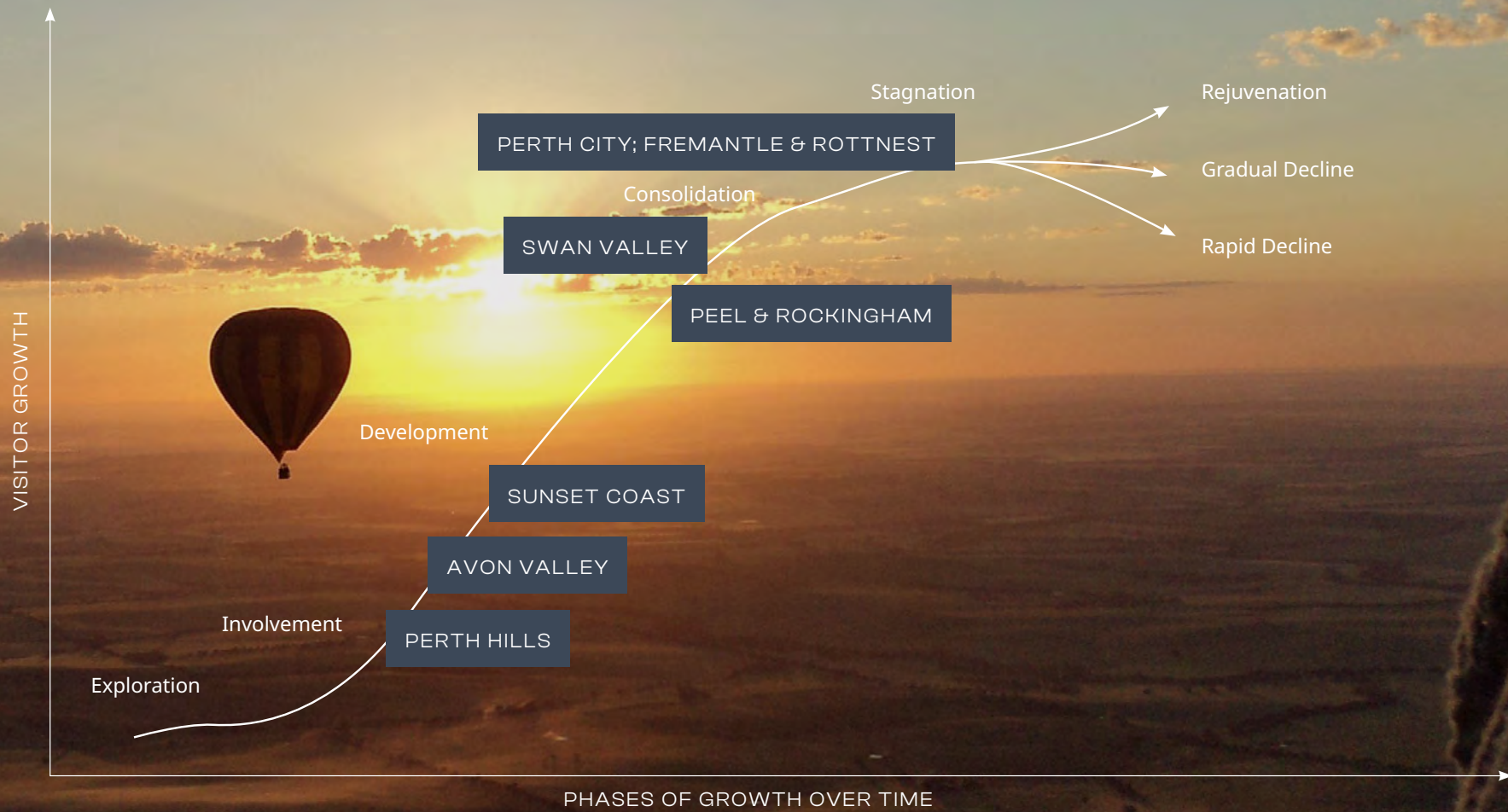


Figure 1: DP tourism destination life cycle Model Source: Butler (1980)



## SUBREGIONAL TRANSITIONS

### PERTH CITY: CONSOLIDATION TO REJUVENATION

Perth City is the most advanced in the tourism life cycle and serves as the central hub for visitation and tourism activity in the metropolitan area. It attracts high levels of visitation and spending, making its growth crucial for the state's overall visitor economy. However, having reached the consolidation phase, it now needs to enhance its offering to avoid stagnation and to enter a phase of rejuvenation.

Currently, Perth lacks a clear brand proposition in the minds of potential travellers. To avoid stagnation, Perth needs to be elevated into a destination in its own right, with a clear story and brand aligned to the broader Tourism WA global brand, that is embraced by stakeholders within the subregion.

Connecting Perth City to the broader region is essential for investment, market attraction, workforce development and industry opportunities. Building physical connections within and outside the city through walkways and cycleways and on the Swan River will also be necessary to enhance the visitor experience and will support the region's naturally adventurous vision.

Further activation of the Swan River with experiences and amenities will also be critical in enhancing the offering of the subregion. On a broader scale, adopting a more tourism focused approach to public transport offerings would improve connectivity and further enhance the visitor experience.

Workforce engagement is a national issue that significantly impacts the viability of the tourism and hospitality industries. In Perth City, delivery of affordable accommodation for staff and international students will be imperative to grow a sustainable visitor economy and streamlined development proposals will be necessary to achieve this.

Effective engagement with local tourism and hospitality operators, as well as attraction of new investors, is crucial to develop and promote tourism products and experiences that leverage the area's strengths. Local governments in the Perth City subregion have already initiated numerous infrastructure and amenity improvements, contributing to the city's reputation as the sixth most liveable city in the world.

Rebuilding international and domestic air capacity is vital to reconnect the region with its markets. Alignment across visitor, business and freight markets is necessary for success in the competitive aviation recovery landscape.

The City of Perth, located at the heart of the subregion, plays a vital role in developing infrastructure that supports the entire region. Strengthening local government, local businesses and community support for tourism, as well as ongoing investment in public infrastructure and amenities, is essential to drive visitor economy growth and raise awareness.





## FREMANTLE & ROTTNESST: CONSOLIDATION TO REJUVENATION

Continuing to enhance and promote Fremantle and Rottnest as must-see destinations for visitors to Perth and Surrounds is key to increasing visitor expenditure, by extending length of stay. Continued collaboration between the Rottnest Island Authority, local governments (City of Cockburn, City of Fremantle, Town of East Fremantle) and local tourism organisations is essential for avoiding stagnation and achieving growth.

Fremantle, a historic and culturally rich destination, continues to attract visitors with its vibrant markets, heritage buildings, maritime history and unique atmosphere. Recent redevelopment efforts, such as the redesign of Bathers Beach foreshore, significant hospitality venues at Victoria Quay, and the repurposing of heritage assets into unique hospitality and accommodation offerings, have successfully revitalised the city.

To maintain this positive trajectory, supporting the new investments with a well-planned calendar of events is crucial. This should include a balance of signature events, mid-tier events and regular local events to enhance the visitor experience and promote community involvement. Continuing to attract major cultural and sports events will help

to distribute visitation outside of peak season and further enhance the vibrancy of Fremantle and Rottnest and the subregion's positioning as a world-class destination.

Identifying development opportunities that further emphasise Fremantle's unique heritage, from its convict history to the preservation of Victorian and art deco era buildings, will encourage visitor dispersal into the subregion.

Implementation of the Fremantle Harbours Master Plan (2022), which will guide the development of the harbours into the future, will enhance tourism amenity and help to enable improved visitor access to and around the subregion. The relocation of port operations to Kwinana through the Westport project presents opportunities to plan for tourism investment in the redevelopment of Fremantle into the future. This should include consideration of tourism as a key industry sector at Fremantle's North Port, including development of beachside accommodation and attractions. Planned State Government investment into the Victoria Quay precinct, including infrastructure upgrades to Fremantle Port, will be critical in supporting enhanced tourism activation and enabling continued cruise ship arrivals. The inclusion of unique tourism assets in development efforts will leverage the unique identity of Fremantle and support the growth and enhancement of the destination.

Rottnest Island has recently undergone significant investment and development in accommodation and hospitality venues, further solidifying its status as a must-visit destination. In order to achieve rejuvenation, there is a need to further enhance its offerings, with a focus on encouraging the development of new experiences and bookable tourism offerings such as food and drink and nature-based experiences. A critical requirement for Rottnest Island is the development of new accommodation ranging from lower end to unique accommodation such as eco/experiential offerings.

The Rottnest Island Management Plan (RIMP) 2023–28 focuses on diversifying the visitor base, enhancing the visitor experience, delivering sustainable infrastructure, respecting cultural heritage, conserving the environment and fostering partnerships. These focus areas are supported by key initiatives designed to promote new tourism opportunities on the island, while retaining its unique natural attributes.

Implementation of these plans and the tourism opportunities they present, including leveraging the unique natural and heritage assets of the area through enhanced tourism products and diversified accommodation offerings, will ensure the Fremantle and Rottnest subregion can continue to develop and progress to a phase of rejuvenation.



## SUNSET COAST: DEVELOPMENT TO CONSOLIDATION

The Sunset Coast has successfully progressed to the development stage, as evidenced by its increasing visitor numbers, the presence of national accommodation brands, and the WA Government's investment in the Scarborough foreshore redevelopment. It is crucial to continue enhancing and promoting the Sunset Coast as a contemporary and appealing lifestyle destination, to help increase visitor expenditure, overnight stays and day-trip visitation.

The Sunset Coast attracts a large number of visitors, a significant proportion being the visiting friends and relatives (VFR) market. There is an opportunity to convert these visitors into higher yielding segments, through an increase in bookable tourism product and overnight experiences. The Sunset Coast possesses unique natural assets, including stunning beaches with sunsets over the Indian Ocean, coastal playgrounds like Mettams Pool and the limestone caves at Yanchep National Park. However, the subregion currently lacks bookable tourism products that leverage these credentials.

The development of the Ocean Reef Marina, including hospitality, accommodation, retail facilities, a beach and a coastal pool, presents an opportunity for the establishment of a world-class precinct that will attract leisure visitation. The precinct will also have the capacity for boats and superyachts, presenting further opportunity to develop water-based offerings that link to Fremantle Port as the hub for cruise tourism. The provision of high-quality short stay accommodation within the Ocean Reef Marina will also be important to maximise its potential as a tourism precinct.

The Shire of Gingin has the potential to attract visitors through its authentic rural charm and beauty, and currently offers some dark sky/astrotourism experiences associated with the Gravity Discovery Centre. However, additional infrastructure development and investment is required to elevate its profile within the broader subregion and enhance its unique product offerings. Packaging product with other appealing experiences, such as nocturnal wildlife tours or nature-based product in other Sunset Coast locations will support increased length of stay and yield across the subregion.

The informal alliance between the three main local governments (City of Stirling, City of Wanneroo and City of Joondalup) has an important role in supporting the development and promotion of tourism and events to create awareness of the Sunset Coast, in collaboration with the Destination Perth RTO. The continuation of this alliance, as well as potential inclusion of other Sunset Coast LGAs in the future, will further the benefits of this collaboration to visitor economy growth and development. As part of this LGA alliance, exploring opportunities for the development of co-branded signage and waypoints will enhance positioning of the Sunset Coast brand throughout the subregion. This will also allow for stronger promotion of the Sunset Coast Tourist Drive, walking trails and marine trails to encourage further dispersal of visitors within the subregion.

Local governments across the Sunset Coast have initiated considerable infrastructure planning and amenity improvements in recent years that have helped to establish the area as an attractive place to live, invest and visit. In particular, the Cities of Stirling and Wanneroo have recently made significant efforts in streamlining development applications to improve operations for small businesses. Consistency in the regulation and approvals processes across the subregion will assist in facilitating new tourism investment into the future and will play a role in consolidating the Sunset Coast's tourism appeal.



## SWAN VALLEY: CONSOLIDATION

The Swan Valley offers a valuable contribution to the visitor experiences in the Perth Metro region, and its continued development and promotion is essential. The Swan Valley is located in close proximity to Perth City and is easily accessible by car. Access to the subregion will be further improved with the planned extension of train services to Ellenbrook. This connection will provide a public transport link between the city centre and Swan Valley, with connections to Whiteman Park.

The Swan Valley presents an appealing destination for food, beverage, interactive wildlife and nature experiences, and is the oldest wine region in WA. To maximise the potential of this subregion, it is important to centralise these offerings within the overall Perth story. There are significant opportunities to achieve this, with the Guildford and Swan Valley story intrinsically linked to the development of Perth and Western Australia as the origin of fresh produce and wine historically.

The Swan Valley Tourism Alliance (SVTA) plays a sizeable role in advocating for tourism policy and planning issues specific to the subregion. This organisation works towards promoting and developing the Swan Valley as a memorable destination. Collaboration with local businesses and stakeholders will help to ensure that the subregion's unique strengths and attractions are effectively showcased and marketed.

To attract visitors to stay longer and fully explore the Swan Valley, effective engagement with local tourism and hospitality operators is crucial. This involves fostering collaboration with existing operators

and attracting new investors, particularly in the accommodation sector. Developing and promoting tourism products and experiences that capitalise on the area's unique strengths and attractions will help to entice visitors to extend their stay and fully immerse themselves in all that the Swan Valley has to offer.

The subregion is highly regarded for its locally produced award-winning boutique distilled, beer and cider products. Opportunities for growth include: guided tours and masterclasses; farm-to-table experiences; wine, liquor and produce tastings; and outdoor activities, including arts and cultural attractions or trails to encourage visitor dispersal. Collaborative efforts between the SVTA, local operators and other relevant stakeholders can ensure the delivery of high-quality and diverse experiences that meet the evolving demands and preferences of visitors.

The continued development and promotion of the Swan Valley as a distinctive and appealing destination within Perth and Surrounds will contribute to the overall growth and sustainability of the tourism industry in the region.



## PERTH HILLS: MOVING TO DEVELOPMENT

The Perth Hills is currently the least developed of the subregions in the Perth Metro region, in terms of bookable tourism product. However, the subregion boasts a number of assets that provide opportunities for the development of new tourism products and experiences that will increase visitation and yield to help progress the maturity of the destination.

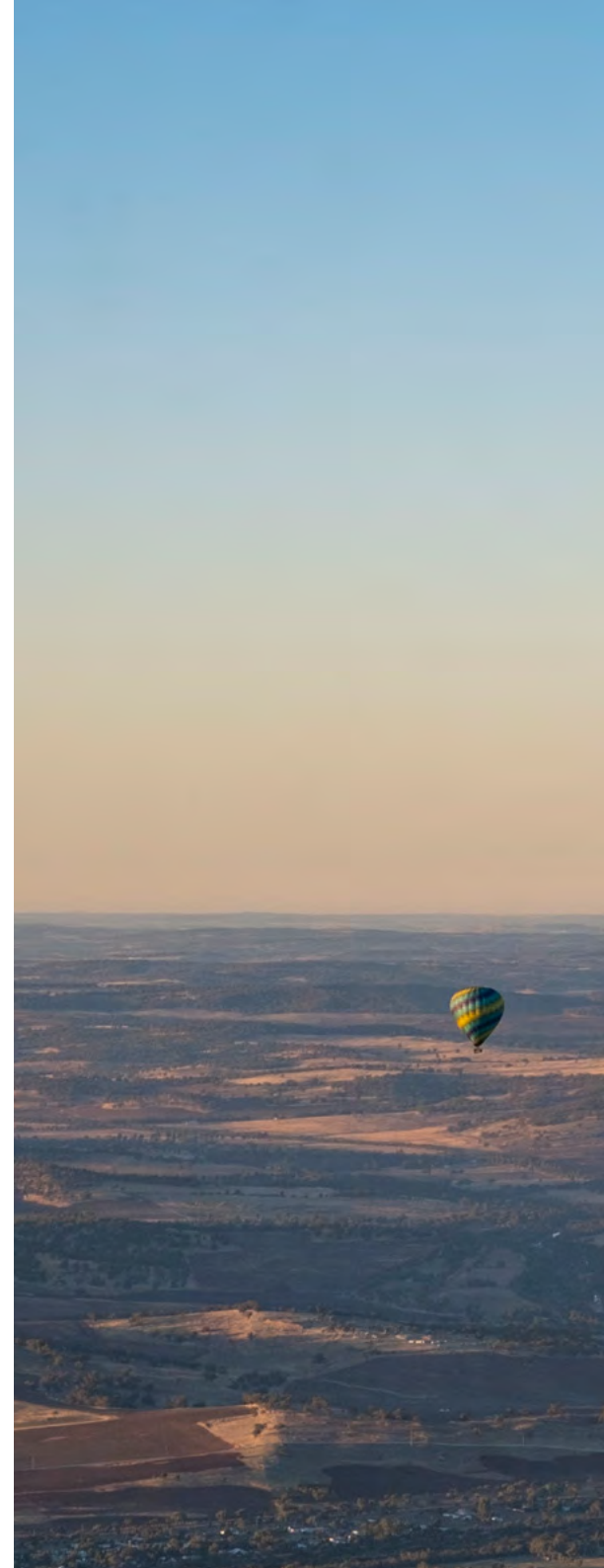
The subregion has seen a notable increase in tourism infrastructure, particularly accommodation, to cater for growing visitor numbers. Recent increases in bed and breakfasts, guesthouses, boutique hotels, and wellness properties has provided visitors with more choices which cater to different preferences and budgets. Despite this, there is still a lack of high-capacity hotels, and the subregion is reliant on independent businesses and short stay accommodation.

The Perth Hills subregion offers a range of attractions including national parks, regional parks and reserves which provide opportunities for activities such as hiking, mountain biking, wildlife spotting and scenic drives, attracting nature enthusiasts and outdoor adventurers. These natural attractions, and their proximity to the city contribute to the appeal of the Perth Hills, particularly as an adventure destination. However, there is a need to develop further bookable product that leverages these assets to grow the naturally adventurous product offering.

The Perth Hills also boasts several historical and cultural attractions that provide insight to the subregion's history. The Mundaring Weir is a heritage site which showcases significant engineering achievements and provides visitors with an opportunity to learn about the area's broader

European history. Armadale's pioneering history also presents opportunities to unlock, package and promote untold stories through the development of new tourism attractions and experiences.

The Perth Hills Tourism Alliance (a collaboration between the City of Armadale, City of Kalamunda, City of Swan, Shire of Mundaring and Shire of Serpentine Jarrahdale) plays a crucial role in promoting the subregion and its unique offerings. Effective collaboration between LGAs and the State Government to enhance the tourism offering, destination marketing and develop new products such as: agritourism; adventure tourism; Aboriginal tourism; and arts, culture and heritage experiences will assist in moving the destination to the development phase of the tourism life cycle.





## AVON VALLEY: MOVING THROUGH DEVELOPMENT

Growing the density and diversity of tourism experiences and accommodation offerings across the Avon Valley will help move the subregion through the development phase over the next decade.

The Avon Valley has a strong range of heritage, culture, nature-based and creative experiences that underpin its potential as a destination for short breaks from Perth. Strengthening the story and positioning of the subregion through its hero experiences is critical to increasing visitor expenditure, overnight stays and day-trips.

The Avon Valley Alliance, consisting of the five primary local governments, is a strong collaboration that can continue to support the growth, development and promotion of the local tourism industry, in partnership with adjoining subregions and the Destination Perth RTO. An important consideration in positioning the subregion is the consistent reference to the Avon Valley as the destination rather than focusing on individual towns.

A critical need is to ensure the communities within the subregion are aware of the benefits of tourism and are supportive of future growth. Strengthening local government, local business and community support for tourism as well as ongoing investment in public infrastructure and amenities that make the place appealing for residents and visitors are necessary to drive visitor economy growth and visitor awareness. Ensuring

high-quality digital infrastructure and connectivity throughout the subregion will also be critical in ensuring visitor servicing, safety and making the destination more appealing for visitors.

To encourage visitors to stay longer and explore the area, effective engagement with local tourism and hospitality operators as well as new investors, is required to develop and promote tourism products and experiences that capitalise on the area's natural strengths. The development of bookable tourism products and experiences along the Avon Valley's tracks and trails, including the expansion of adventure product, will complement the offering in neighbouring areas and provide opportunity for packaged experiences and all-inclusive tours. Capitalising on the subregion's unique features through niche tourism experiences, including heritage or agritourism will assist in growing the offering. Further development of Aboriginal tourism experiences is also a significant opportunity for the subregion to enhance its tourism offering.

Leveraging the Avon Valley's accessibility/connectivity from Perth through exploring and promoting new modes of transport, including rail and cycle into the subregion will assist in driving visitation. Converting day-trip visitors to overnight visitors, through the development of additional accommodation offerings will also be key in growing yield. This may include unique or experiential offerings such as farm stays and glamping which provide appealing reason for visitors to stay overnight. Continuing to support and grow the subregion's unique festivals and events will also encourage overnight stays and help grow yield, further moving the Avon Valley through the development stage over the next decade.



## PEEL & ROCKINGHAM: MOVE FROM DEVELOPMENT TO CONSOLIDATION

Capitalising on Peel and Rockingham's strength as the nature-based adventure capital in Perth and Surrounds is important to position the subregion within the broader vision for the region.

The Peel and Rockingham subregion currently has one of the lower overnight spends in the Perth and Surrounds region. Increasing yield will come from attracting higher value markets and encouraging day-trip visitors to stay overnight. The Peel and Rockingham subregion currently enjoys high visitor numbers and appeal with HYTs, a solid base from which to develop a high-yield proposition for greater conversion.

Rockingham, with its coastal location and attractions such as the Shoalwater Islands Marine Park, Penguin Island and Rockingham Foreshore, has already established itself as a popular destination within the Perth and Surrounds region. The key attraction of swimming with dolphins is appealing to the international market and further leverages the region's aquatic and adventure experience pillars. Penguin Island remains a key feature of a broader package of wildlife experiences including sea lions, pelicans and seabirds, along with swimming, snorkeling and kayaking. The closure of the Penguin Island Discovery Centre presents an opportunity to develop new mainland attractions and create new experiences that cater to a wider audience. Over the next decade, the focus should be on improving

infrastructure, diversifying tourism offerings and ensuring long-term sustainability in Rockingham.

One potential avenue for growth lies in leveraging Rockingham's significant sporting infrastructure to attract visitors from different sporting segments. By hosting tournaments, competitions and sporting events, Rockingham can tap into a new market and increase visitation throughout the year. Additionally, the region could explore opportunities beyond its natural assets, such as cultural events, food and wine festivals, or adventure tourism activities, to broaden its appeal and attract a diverse range of visitors.

The Mandurah area has experienced a significant increase in visitor numbers over the years. The destination's unique coastal and wetland attractions, such as the Mandurah canals and diverse marine life, have captured the interest of both domestic and international tourists. The growing popularity has led to a rise in visitor arrivals, indicating the development of the destination. Accommodation offerings and tourism-related services, such as tour operators, restaurants and transportation options, have emerged to support the growing tourism industry. However, there is potential to develop additional unique accommodation offerings in order to match supply with the current demand.

Currently the main focus of the Peel area's visitation is its coastal assets and specifically Mandurah. Mandurah was awarded the state's Top Tourism Town in 2022 and 2023 and offers a diverse range

of water-based and wildlife activities. The Thomas Dambo Giants of Mandurah is a larger-than life-sculpture trail that has attracted thousands of visitors to the Peel area. Opportunities for the development of other unique attractions of this scale throughout the Peel area should be explored to attract new visitors and encourage dispersal.

There is the need for further development of areas such as Boddington and Waroona, to help propel the subregion through the tourism life cycle. At this stage, there is also a need to focus on new tourism product and experience development that leverages the area's strengths, including Aboriginal tourism and heritage to provide unique, appealing offerings for visitors. Both Pinjarra and Dwellingup have established themselves as adventure tourism destinations with nationally recognised mountain bike trails, and would benefit greatly from bookable, all-inclusive adventure tourism products to further enhance the overall offering. Revitalisation of the Pinjarra Heritage Railway Precinct also presents opportunities to establish a compelling tourism offering for the subregion. The addition of new accommodation offerings over the next decade will help contribute to the development of the destination, towards the consolidation phase.







# TRENDS & FOCUSES

## ACCESSIBLE & INCLUSIVE TOURISM

The need to provide greater inclusivity for visitors, through the development of accessible tourism facilities and attractions, is growing. In Australia, approximately two million people with limitations or disabilities travel for leisure as well as a similar number who act as carers. Tourism Research Australia (TRA) data in 2018 estimated that 20 per cent of Australians had a disability or long-term health condition. By 2050, more than a quarter of the population will also be aged 65 or over.

TRA estimated the accessible tourism sector in Australia in 2018 to be worth \$8 billion. As the population grows and demand increases, it is expected that accessible tourism will become even more important. Over the next decade, it will be critical to delivery capacity building initiatives that ensure operators have the resources and skills required to deliver quality accessible tourism products and services tailored to this market.

## AGRITOURISM

Agritourism is a growth engine for Australian agribusiness and incorporates a range of activities that bring together agriculture and tourism friendly offering. This includes on-farm experiences; farmers markets and produce outlets; food and wine festivals; natural attractions; culture; music; and the arts.

In 2018, agritourism in Australia was valued at \$10.7 billion, with six per cent of this attributed to domestic day-trippers, 42 per cent to domestic overnight visitors and 52 per cent to international visitors. The sector's value is expected to increase to \$18.6 billion by the end of 2030.

Tourism WA's Market Segmentation Research from November 2021 demonstrated a considerable opportunity to embed agritourism as an appealing holiday in travellers' minds. Activities that attract high interest include camping, historical agricultural exhibits, bush tucker experiences and farm stays/tours. Perth Hills, Swan Valley, Avon Valley and areas of the Peel region, such as Serpentine Jarrahdale, align with this niche and provide opportunity for agritourism product development.

## ABORIGINAL TOURISM

The appeal of Indigenous travel experiences is growing globally. According to the International Visitor Survey in 2019, approximately 1.4 million international visitors took part in an Aboriginal experience on their holiday to Australia. Through the Jina: Western Australian Aboriginal Tourism Action Plan (Jina Plan), Tourism WA is committed to the expansion of Aboriginal tourism in the state, in partnership with key stakeholders such as the Western Australian Indigenous Tourism Operators Council (WAITOC).

With over 80 per cent of visitors expressing interest in taking part in an Aboriginal tourism experience, Tourism WA views Aboriginal tourism as a key pillar and differentiator for the state's tourism offer. However, currently only 17 per cent of visitors are able to undertake an Aboriginal tourism experience for a variety of reasons, including a lack of accessible time or products. It is therefore crucial to consider opportunities for Aboriginal tourism experiences in product development and planning.

There are significant opportunities within the Perth and Surrounds region to establish new cultural assets and experiences such as the weekly cultural performances at Boola Bardip, along with continuing to further promote existing operators. Opportunities to leverage the Jina Plan, including the Custodians program and integration of Aboriginal language and cultural welcomes in tourism assets, should continue to be investigated and progressed to highlight Aboriginal culture and grow the range of authentic tourism offerings throughout the region.





## ADVENTURE TOURISM

In 2019 the adventure tourism market in Australia generated around \$22.37 billion. This is estimated to increase to \$33.52 billion by 2027. The soft adventure (i.e. low to moderate risk activities such as hiking and mountain biking) market is the largest contributor within this category and is predicted to remain as such into the future. Land-based adventure activities are expected to continue as the most popular attraction.

Cycle tourism has been identified globally as a key growth adventure tourism activity due to its low-impact, high-spend, and high dispersal nature.

The adventure tourism market is growing globally, and the Perth and Surrounds region is uniquely placed geographically and temperately to capitalise on it. Perth is the sunniest capital city in the world, averaging around eight hours of daily sunlight year-round. This makes it the perfect climate for adventure activities and a key selling point that delivers on the region's naturally adventurous vision.

The Swan River provides easy access to various water activities such as jet skiing, jet boating, cruising, sailing and kiteboarding, while the centrality of the river makes it accessible from most subregions.

Popular adventure activities in the region include skydiving, mountain biking, hiking, surfing, sailing and kayaking. The Perth and Surrounds region has many paths and trails to walk, hike, cycle or horse ride. The region also includes portions of the Munda Biddi and Bibbulmun Track, offering cross-regional long-distance cycling and hiking opportunities. There are opportunities to leverage the natural assets in subregions such as Perth Hills through the development of new adventure tourism products including climbing, abseiling, ziplining, tree top walks and bookable hiking/mountain biking experiences.

Wildlife interactions are also a highlight, with experiences such as: swimming with dolphins and sealions; quokkas on Rottnest Island; Caversham Wildlife Park; Paruna Wildlife Sanctuary; Yanchep National Park's koalas and kangaroos; interpretive tours through Yalgorup National Park and Dwellingup; and waterbirds and dolphins in the Swan River.



## ECOTOURISM

Ecotourism includes most forms of nature-based tourism, in which the main motivation for tourists is the observation and appreciation of nature, along with the possibility of learning about traditional cultures in natural areas. Major online travel booking services such as Trip.com now have over 10,000 eco-friendly travel product offerings on their platform. There is an identified opportunity for the Perth and Surrounds region to expand ecotourism products, particularly in areas with significant natural values such as Rottnest Island, Kings Park, Rockingham and the Peel region to further leverage this niche.

## SUSTAINABLE TOURISM

Combined with the move towards nature-based tourism experiences, modern day travellers have high expectations of the sustainable credentials of both destinations and experiences. Consumers place greater importance on climate change impacts and their own environmental footprint and have a growing awareness on how destinations approach the sustainability of their tourism offer.

This trend places greater demand on operators to meet the criteria of a growing audience. Allied Market Research projects the sector to be worth US\$338 billion by 2027, up from US\$181 billion, with increases in both group and solo travel, and market-leading growth in the Gen Z age group of travellers.

## ARTS, CULTURE & HERITAGE TOURISM

Heritage tourism, defined as 'travel to experience stories, places and traditions embodied in natural, built and cultural heritage', is emerging as a rapidly growing tourism category. In 2017, around 15.9 million domestic day-trippers undertook a heritage or cultural tourism activity; 15.2 million domestic overnight visitors; and 4.5 million international visitors.

Of all international visitors to Australia in 2017, around 34 per cent participated in a heritage and arts activity. In 2018, domestic visitors took over 12 million day-trips spending approximately \$138 per trip and 13 million overnight trips (average trip length of five nights and average spend of approximately \$1,068 per trip). Continuing to build upon experiences including: the World Heritage Listed Fremantle Prison; exploring WA's past, present and future at WA Museum Boola Bardip; the history of Rottnest Island; the early settlement history in Avon Valley towns; historic and heritage assets in Jarrahdale; or the unique Monastic heritage of New Norcia, is important in leveraging this tourism niche.

According to research undertaken by Tourism Australia, 40 per cent of out-of-region travellers have an affinity for museums and galleries. Museums and galleries are portals to culture, heritage and environment. The WA Museum Boola Bardip, WA Maritime Museum and the WA Shipwrecks Museum tell the stories of Western Australia, its people, places and unique environment.

Additionally, travellers are attracted by, and are willing to travel for, the desire to immerse themselves in a destination's history and culture and the chance to view significant collections and exhibitions, particularly those unique to a destination.

There is the opportunity to leverage and enhance existing museum and gallery infrastructure, exhibits, events and content to meet the needs of these visitors. Similar to the impact of MONA in Hobart, Tasmania, the WA Museum Boola Bardip has the potential to bolster the state's cultural identity to resonate globally and attract diverse audiences. Proposals to redevelop/refurbish underutilised heritage assets for tourism purposes, particularly those located close to Perth's natural assets including the Swan River, oceanfront, or in key tourism nodes, should be actively supported.



## **DARK SKY TOURISM**

Tourism WA data from 2021 showed that dark sky tourism has an appeal amongst domestic audiences, especially alongside nature/wildlife and other outdoor experiences. The Perth and Surrounds region currently offers a range of dark sky/astrotourism experiences, including the Gingin Gravity Discovery Centre and Perth Observatory in the Perth Hills.

This trend presents an opportunity to develop additional dark sky tourism product with idyllic dark sky viewing in locations away from light pollution such as the Avon Valley, Peel or Perth Hills. Promoting dark sky product packaged other appealing experiences, such as nocturnal wildlife tours in the Peel and Rockingham or Perth Hills subregions, is another opportunity for the region and further compliments its naturally adventurous vision.

## **DIGITAL INNOVATION**

Tourism businesses are constantly seeking innovative solutions to enhance the visitor experience, improve operational efficiency, and to stay competitive in the market. This includes adopting new technologies such as virtual reality, artificial intelligence and mobile applications, as well as developing unique and immersive experiences that cater to the evolving needs and interests of travellers.

In collaboration with Tourism WA, there is a significant opportunity for the Perth and Surrounds region to provide a more tailored experience for visitors and strengthen its position as a competitive international

destination through the development of user-friendly websites and mobile applications that provide real-time information, personalised recommendations and seamless booking processes.

It is important to note however, that some subregions within Perth and Surrounds require improved mobile and internet connectivity. Over the next decade, improvements to connectivity in subregions such as Swan Valley and Perth Hills will be necessary to address gaps, meet customer service expectations and enable digital innovation.

## **WILDFLOWER TOURISM**

Western Australia's wildflower collection is one of the largest in the world, and Tourism WA research from 2021 demonstrated there is broad consumer interest in wildflower tourism. This presents a unique opportunity to not only attract visitors but also to encourage them to extend their stay by linking various experiences throughout the region.

The Perth and Surrounds region offers a range of wildflower experiences, including a collection of over 3,000 species of unique flora in Kings Park within Perth City. Promotion of existing wildflower trails facilitates visitor dispersal throughout the subregions, with prevalent wildflower displays occurring in the natural environment of the Avon Valley and Perth Hills.

## **FOOD & BEVERAGE PROVENANCE**

A strong and evolving trend, both in source markets and globally, is an increasing interest in the provenance of food and drink. Consuming produce at or near the source and identifying the terroir, not just of wine, but of produce, seafood and drink, as well as the craft of production are all highly marketable trends that are now demanded by high-yield audiences, and the Perth and Surrounds region can capitalise on this.

There are a number of regularly operating local farmers markets, which showcase a wide array of fruits, vegetables, cheeses, meats and artisanal products, providing an excellent opportunity to taste and purchase seasonal produce directly from local producers.

Many opportunities exist across the Perth and Surrounds region to connect with the making element of produce. Meet the maker/fisher/farmer experiences connect with the skills of local producers and allow visitors to experience unique tastes and artisanal produce. The region can leverage its easily accessible and unique assets such as the seafood industry in Fremantle and opportunities to meet the winemaker, distiller or farmer in the Swan Valley to appeal to this market.



# INTERNATIONAL MARKET INSIGHTS

## Tourism Australia’s Future of Demand Research: Perth and Surrounds Region Analysis

### The Research

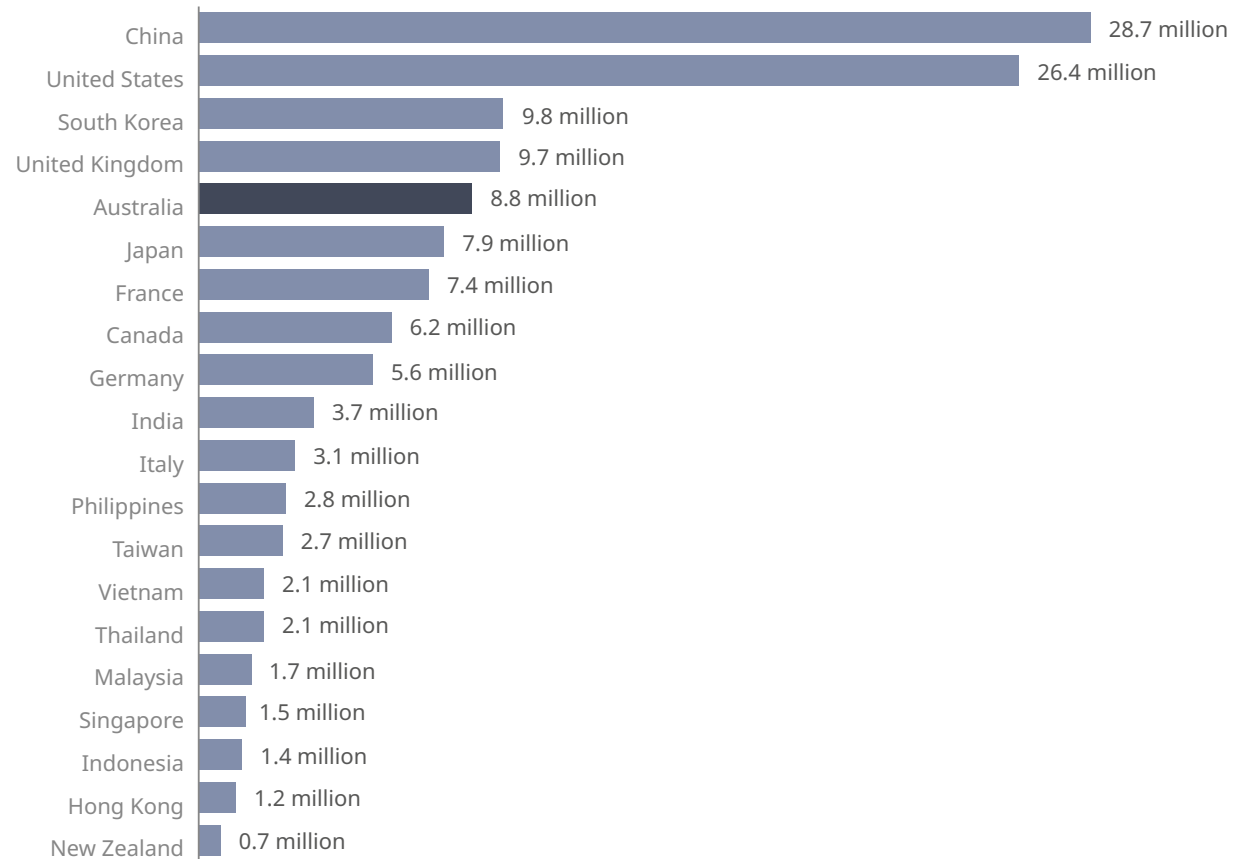
Tourism Australia’s (TA) Future of Global Tourism Demand project highlights the experiences that will drive Australia’s tourism demand now and into the future across Australia’s 19 core international markets, plus Australia.

### The Method

The research occurred between December 2021 and June 2022. The process engaged close to 24,000 travellers from 20 markets, including 19 international markets, plus Australian out-of-region travellers.

It actively assessed stakeholder knowledge, published documentation and online conversations to provide a foundation to build hypotheses that were then validated through quantitative survey processes.

ANNUAL OUT-OF-REGION TRAVELLER TO AUSTRALIA



GLOBAL (excl. AU) 125 million



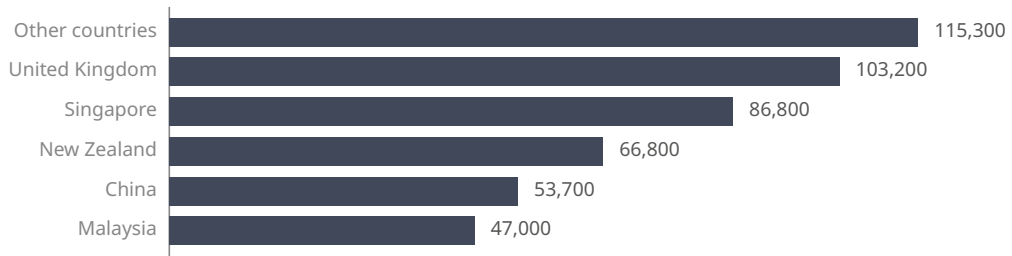
### EXPERIENCE SECTORS AND SIZE OF MARKET INTEREST



Refer to pages 58 – 62 for a breakdown of each experience sector.

### PERTH & SURROUNDS INTERNATIONAL MARKETS

International market visitor breakdown (YE December 2023)





## HERITAGE EXPERIENCE SECTOR

Heritage travellers experience the world through its places and people. These travellers have an overall interest in history and Indigenous activities.

Travellers from Malaysia are primarily interested in architecture and notable monuments. Promotion of the region's architecture including The Kings Park State War Memorial, The Perth Bell Tower, The Fremantle Round House, or the monastic, Aboriginal and European heritage buildings in New Norcia would appeal to this sector.

French travellers also noted a specific interest in community stories and culture. Promoting the Perth Cultural Centre, including exhibitions that focus on the culture of West Australians may assist in attracting this market.

For the German market, the activity of highest appeal is visiting Indigenous sites. The Perth and Surrounds region offers a range of Aboriginal tourism experiences, and further development and marketing of these offerings could grow this market.

## NATURE EXPERIENCE SECTOR

Nature travellers immerse themselves into nature via landmarks and wildlife. These travellers have an overall interest in the natural environment and its phenomena.

For visitors from the United Kingdom, the activity of highest appeal is seeing wildlife in their natural environment. The German market is interested in exploring wilderness and nature and marine-life watching. This is a particular strength for the Perth and Surrounds region, and promotion of the range of nature products available throughout the subregions is an opportunity to disperse visitors further.





## ADVENTURE EXPERIENCE SECTOR

Adventure travellers seek activity and exploration through land, sky and water. They are interested in water activities, land and sky exploring, driving, and camping journeys.

For the German market, the activity of highest appeal is hiking, walking and cycling. French visitors are interested in walking tours, trekking and camping. The region offers the ideal climate for adventure activities, with a diverse range of paths and trails to walk, hike, cycle or horse ride.

## SENSORY EXPERIENCE SECTOR

This traveller enjoys good food and drink, popular experiences, wellness and culture. They are interested in the arts, wellness, immersive experiences, food and beverage.

The top overall sensory experience for travellers is dining out, with 13 countries listing it as their highest-ranked activity. The second most popular sensory activity was visiting a beach. This is the highest ranked activity for travelers from China, Italy, the United Kingdom and France.

This is a considerable strength for the Perth and Surrounds region, with a diverse range of dining offerings. However, there is opportunity to develop new unique hospitality offerings that leverage coastal views or showcase local produce.



## IMMERSIVE EXPERIENCE SECTOR

This traveller seeks to broaden their world view through learning, education and personal development. They are interested in personal journeys, agritourism, ecotourism and learning.

While some countries prioritise this type of travel, it tends to fall lower on their list of activities of highest appeal. For this reason, it is suggested that there are other experience sectors to focus on for the Perth and Surrounds region. Regardless of this, the region offers a range of experiences that would be of particular interest to the immersive traveller and could assist in growing the market, such as: cheese/chocolate making workshops; Aboriginal craft workshops; eco-tours, including e-bikes, segways, wildlife and nature based activities and supporting existing businesses to diversify into agritourism in subregions including Avon Valley, Perth Hills and the Swan Valley.

## INTEREST EXPERIENCE SECTOR

Driven by their hobbies and passions, this traveller possesses an overall interest in an array of personal avocations.

The most popular interests are shown to be photography and stargazing, appealing to travellers from Thailand and South Korea. There is opportunity to grow these markets, particularly through the development of compelling dark sky tourism experiences.









# DOMESTIC MARKET INSIGHTS

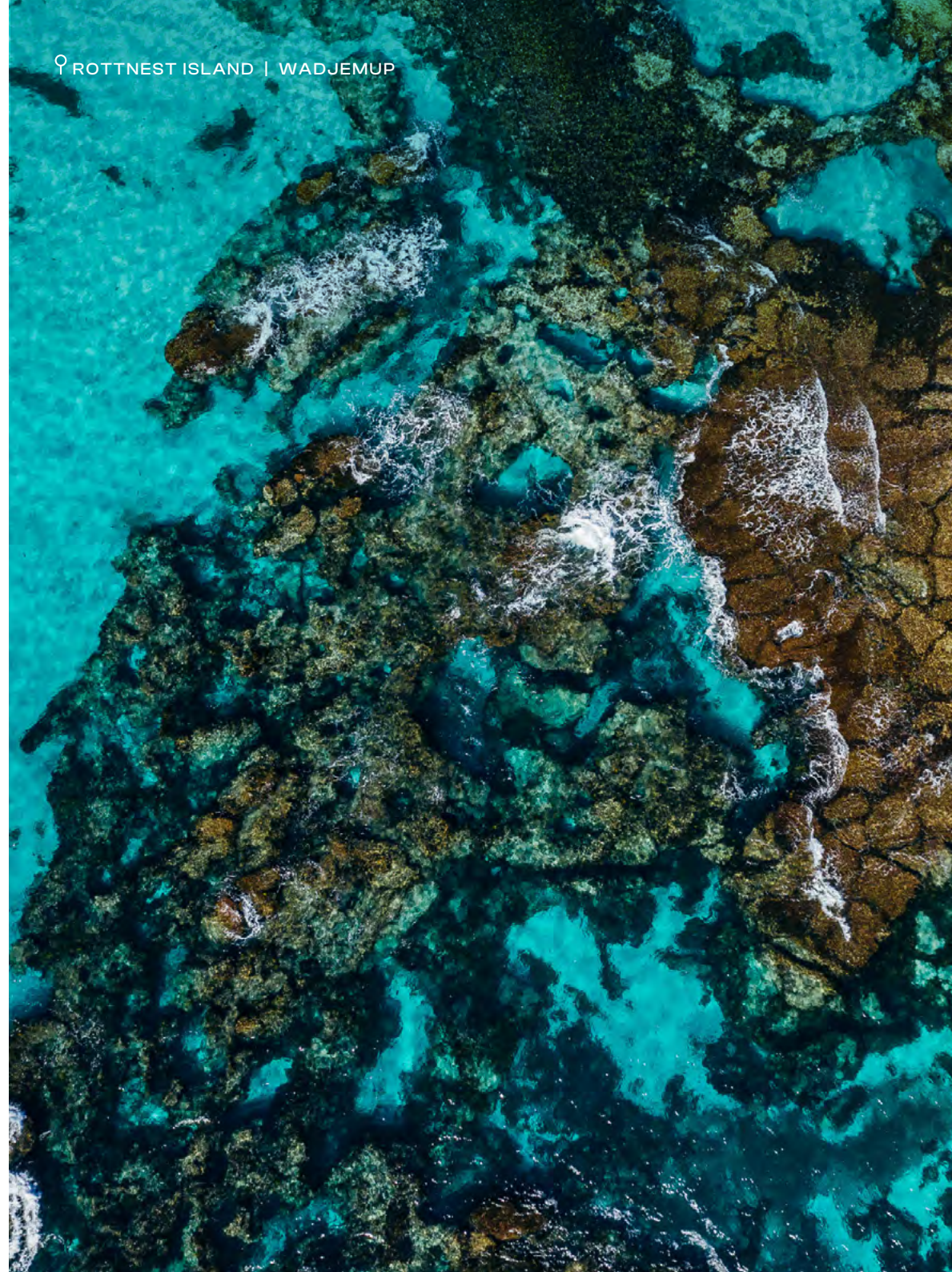
## Tourism WA Domestic Segmentation Model

Tourism WA's Domestic Segmentation Model (2023) identifies Australia's full range of domestic trip types and focuses primarily on WA's current market share of each trip segment. It was built using 200 variables of data collected from 3,500 Australians in July and August 2022, resulting in data on approximately 6,500 trips, forming the model's basis.

Six types of trips were identified along with their market share, average spend, popular activities and experiences, and reasons for destination choice.

Not all segments are natural targets for the Perth and Surrounds region, and those that are represent varying levels of opportunity. Some represent opportunities to attract interstate visitors while others are more aligned with the intrastate market. It should be noted that there is a significant overlap between the segments.

This tool has been used to inform Perth and Surrounds' supply and demand-side decisions by identifying the destinations and/or product mix that appeals to the different segments, particularly in targeting HYTs. The marketing and product development opportunities and key infrastructure projects over 10 years for the region have been aligned to each domestic trip segment, as outlined below. This demonstrates that the priority projects and opportunities for the Perth and Surrounds region predominantly target the Premium Nature (PN), Simple Nature (SN), Family Time (FT), Luxe Culture (LC) and City Social (CS) segments through the existing mix of nature-based, luxury, family-friendly and Aboriginal tourism offerings.







## PREMIUM NATURE

This trip type is a premium adventure holiday in nature, exploring untouched wilderness and new experiences.

Average spend: \$332 per person per night.

As the segment with the highest spend, marketing and product development should focus on developing campaigns and experiences that align to popular activities that define PN trips. This includes immersive nature, sustainable tourism, unique experiences and wildlife, pristine coastlines, and Aboriginal experiences.

## SIMPLE NATURE

This trip type is a holiday in nature to relax, escape distraction and reconnect to the simple things.

Average spend: \$121 per person per night.

While SN is a lower spend segment, the natural assets of the Perth and Surrounds region make it an appealing destination for SN travellers. Popular elements of SN trips are unspoilt nature, road-trips and immersion in nature and wildlife. These are all similar elements to a PN trip; however, SN travellers are looking for a lower budget version, with camping as a popular accommodation option.



## FAMILY TIME

This trip type is a family holiday on the coast, returning to favourite destinations and relaxing by the beach.

Average spend: \$172 per person per night.

Popular elements of FT trips include pristine coastlines, adventure activities and immersive nature, which are significant strengths for the region to leverage. A key characteristic of this segment is quality time and rest and relaxation, therefore promotion of assets that appeal to these characteristics has the potential to drive demand. This segment presents opportunity to attract the significant and growing intrastate market within the Perth and Surrounds region.

## CITY SOCIAL

This trip type is a holiday with friends enjoying nightlife and the city energy.

Average spend: \$222 per person per night.

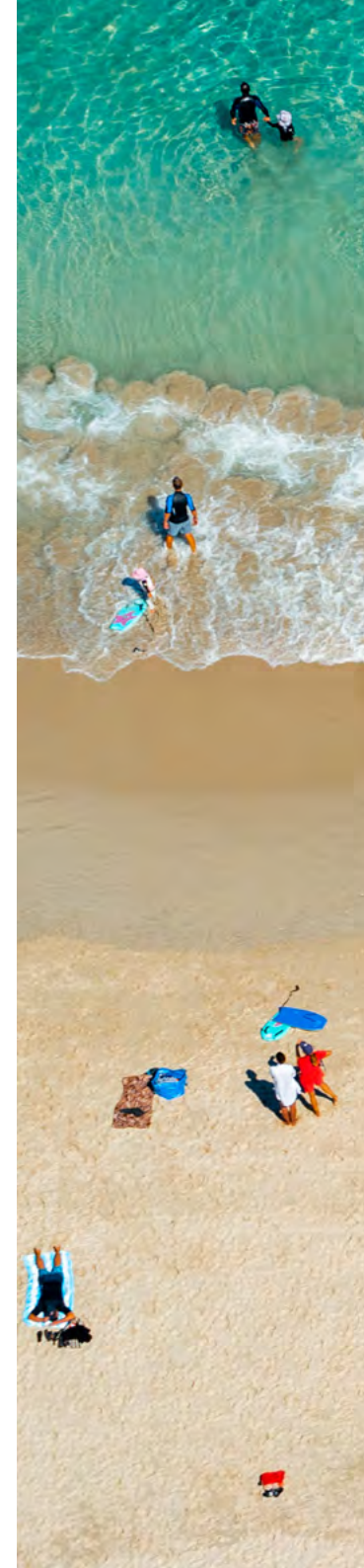
Key elements of this trip type for the Perth and Surrounds region to leverage include the availability of: major sporting events; local festivals/events; vibrant city lifestyle and nightlife; packaged deals; and great food, wine and local produce. Perth currently captures CS trips from both the interstate and intrastate markets, highlighting the awareness for its CS experiences. To grow the number of travellers, ongoing promotion and enhancement of food and beverage offerings and events throughout the region is needed.

## LUXE CULTURE

This trip type is a luxury escape staying at four or five-star hotels and resorts, focusing on restaurants, shopping and culture.

Average spend: \$230 per person per night.

Perth is in the top destinations for interstate travellers for a LC trip. As a high spending segment, growing its share of LC travellers would be of benefit to the Perth and Surrounds region. Popular elements of a LC trip include vibrant city lifestyle, historical/heritage attractions, and great food, wine and local produce. However, a core aspect of a LC trip is the need for a destination to be easy to get to. Marketing and communications to address the time/distance barrier for visitors to Perth will be key in attracting additional LC trips.









## OPPORTUNITIES & CHALLENGES

Opportunities and challenges identified in the baseline analysis and stakeholder engagement program have informed the direction of the TDMP vision, priorities and strategies. They are summarised across supply, demand and capability.









# SUPPLY

## Opportunities

- Perth is a naturally beautiful city situated on the Swan River with more days of sunshine than any other capital city, unique sunsets over the ocean, vast coastline and access to globally recognised parks and nature reserves. Leverage these naturally adventurous assets to build unique, adventurous nature-based tourism product and experiences.
- The subregions of Perth and Surrounds provide an abundance of experiences located within an hour radius of the city. Highlight this diversity through brand-aligned wayfinding and signage to link attractions and encourage dispersal.
- Further connect the Burswood Peninsula with other precincts on the Swan River, presenting opportunities for active transport links.
- Expand upon the ferry network to engage visitors and locals with the river and city in a more appealing way.
- Support the development of riverside tourism attractions and activities.
- Draw on local heritage and stories in wayfinding to develop a strong thematic connectivity throughout the region.
- Make the most of the strong resources and other industry sector presence in Perth to create tailored corporate incentives, conferences and conventions to drive off-season yield.
- Support investment in significant projects for the region that will increase visitation, including: Aboriginal Cultural Centre; Elizabeth Quay; Victoria Quay and Fremantle's Inner Harbour Precinct; Perth Airport; Perth Convention and Exhibition Centre; Perth Cultural Centre; national park upgrades; and marina developments.
- Undertake bookable product and experience development utilising the extensive trail networks throughout the region.
- Develop additional Aboriginal walking tours and other tourism experiences, using nature as a key theme to connect experiences.
- Capitalise on the Indian Ocean location as a hub for the ocean sailing community as one of the state's premier experiences and explore opportunities for cruises linking different harbours/attractions along the coast.
- Build on local food and drink including spectacular seafood, wine and beer to offer compelling 'meet the maker' experiences and events.
- Explore opportunities for the development of agritourism offerings that highlight the unique attributes of the subregions.
- Connect with the region's heritage (e.g. maritime in Fremantle, pioneering in the Avon Valley, and colonial settlement heritage of the Swan Valley) to enhance the visitor experience.
- Develop a major signature event for Perth and a vibrant year-round events calendar that encapsulates and engages the regions.
- Support the development of affordable accommodation options for workers and international students to alleviate pressure on businesses facing staffing challenges.
- Deliver infrastructure projects at the Perth Airport including a new runway, development of an airport hotel, international passenger terminal development and consolidation of airline operations at Airport Central to increase capacity of the airport.
- Actively seek to attract new international and domestic air services and grow frequency and capacity on existing services.





## Challenges

- Lack of connection between major regional and city attractions, with siltation barriers, approval processes and speed limits currently limiting full use of the Swan River as a transport option.
- Urban and regional public transport, cycleways and walkways, and wayfinding between attractions are not connected in a way that is legible for visitors.
- Travelling beyond the city centre, the public transport system is evolving, but still lacks connections to/within the wider region (e.g. Swan Valley, Peel). Improved interpretation is required to assist visitors with wayfinding and connectivity to key attractions outside of the city centre. The vehicle/self-drive dependency of the region's tourism system has both sustainability and affordability implications.
- Lack of coordinated, complementary and connected investment in critical infrastructure, including digital connectivity in some subregions, that supports growth of the visitor economy.
- Lack of investment has resulted in few accommodation and tourism product options for high-yield visitors in the regional areas of Perth and Surrounds.
- Lack of affordable accommodation in the city centre has constrained the growth of the international student market and attraction of a tourism and hospitality workforce.
- Complex planning and approvals processes, including multiple layers of legislation and planning over key tourism assets need to be managed to encourage innovation in tourism development.
- With other major industries competing for resources, it is difficult to establish tourism as a priority at both local and state government levels to produce coordinated and seamless visitor experiences.
- There is a lack of a cohesive planning framework that is focused on connecting high-use visitor areas such as Burswood Park, the Swan River, Kings Park and Elizabeth Quay to public transport.



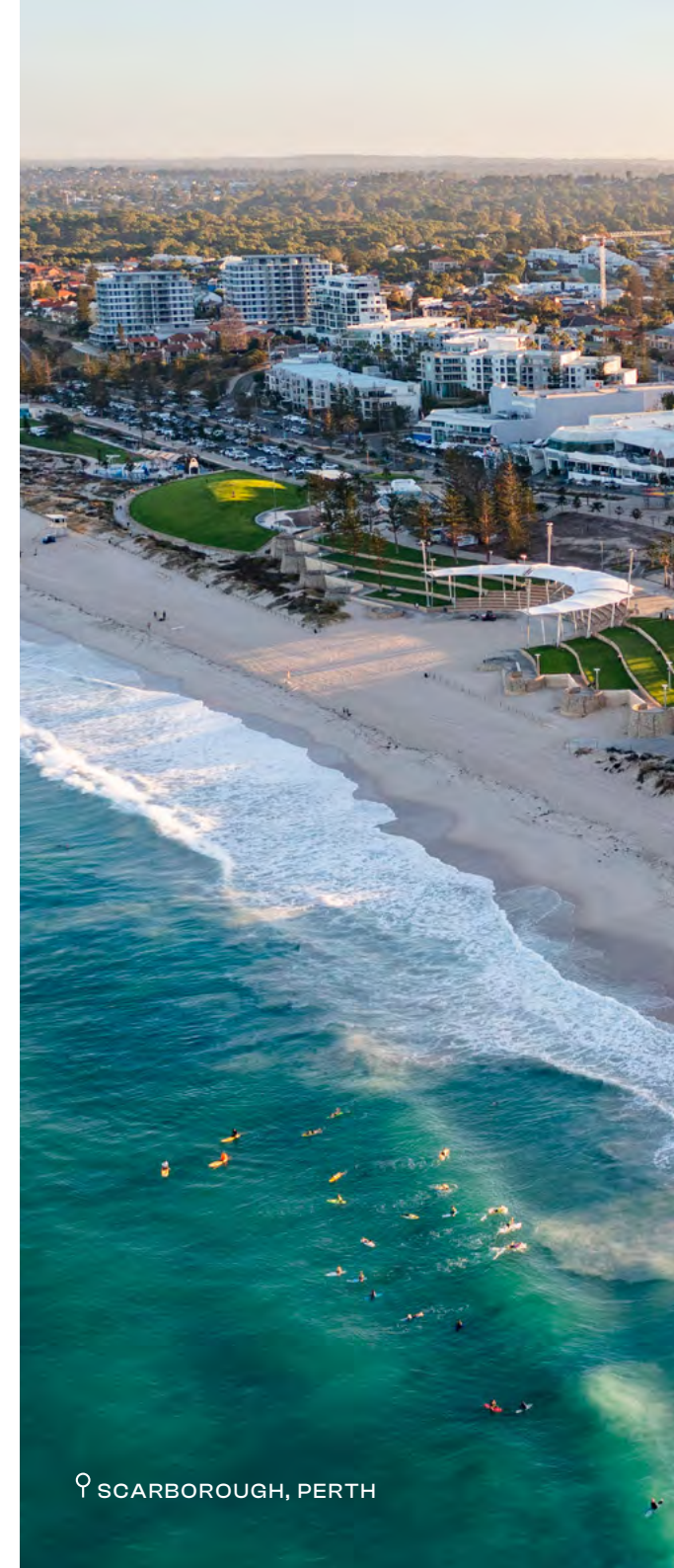
# DEMAND

## Opportunities

- Communicate with operators, trade and the market to leverage the Tourism WA brand platform to build aspiration in high-yield audiences.
- Capitalise on the accessibility of diverse experiences across the region by promoting and packaging tourism products that encourage dispersal.
- Promote accessibility from the airport to the subregions via train to encourage stopover visits and overcome perceived access barriers in the minds of travellers.
- Coordinate marketing and packaging to attract major business events. Offer pre/post-trips to the Meetings, Incentives, Conferences and Exhibitions (MICE) market in outer subregions to spread benefits across the region.
- Promote the strong inventory of four to five-star hotels in Perth City and some regional areas to attract and disperse HYTs throughout the broader region.
- Build collaborative marketing packages with major partners such as airlines, hotels and event organisers to make the most out of the lucrative layover, cruise and business events markets.
- Promote extended stays in the Perth and Surrounds region at the beginning or end of self-drive journeys.

## Challenges

- There is currently a lack of a story for Perth, with no clear understanding of what Perth is about from both the destination and visitor perspectives.
- Dispersed marketing efforts among individual stakeholders rather than focusing on developing key assets to drive competitive advantage.
- Marketing, ticketing and visitor information for attractions throughout the region are not unified in brand voice, legibility or collaboration.
- There are currently major gaps in storytelling and connection to Country throughout the region for visitors to engage with.
- Overcoming the time, distance and cost barriers that require high commitment from international and interstate visitors. Perth is currently perceived as being a long way from anywhere and marketing efforts need to bridge this gap and focus on accessibility.







## CAPABILITY

### Opportunities

- Encourage a collaborative view among stakeholders across the region, including promotion, marketing and packaged experiences.
- Undertake targeted industry training, including front-of-house food service, chef and commercial cookery, tourism business management and tour guiding across the region.
- Support a greater connection across industry to seek solutions such as rostering, staff sharing and innovation.
- Collaborate across government and industry in the area of strategic planning — coordinating strategies designed to attract additional aviation, by including events and international students, to drive businesses cases for further route development.
- Coordinate the delivery of consistent planning decisions across government that enable appropriate development, considering economic, social, environmental and cultural factors.
- Assist tourism operators/businesses in understanding the needs of key markets, particularly the HYTs, to develop marketable products.
- Support capacity building initiatives to increase the cohort of Aboriginal tourism operators and businesses to meet visitor demand.

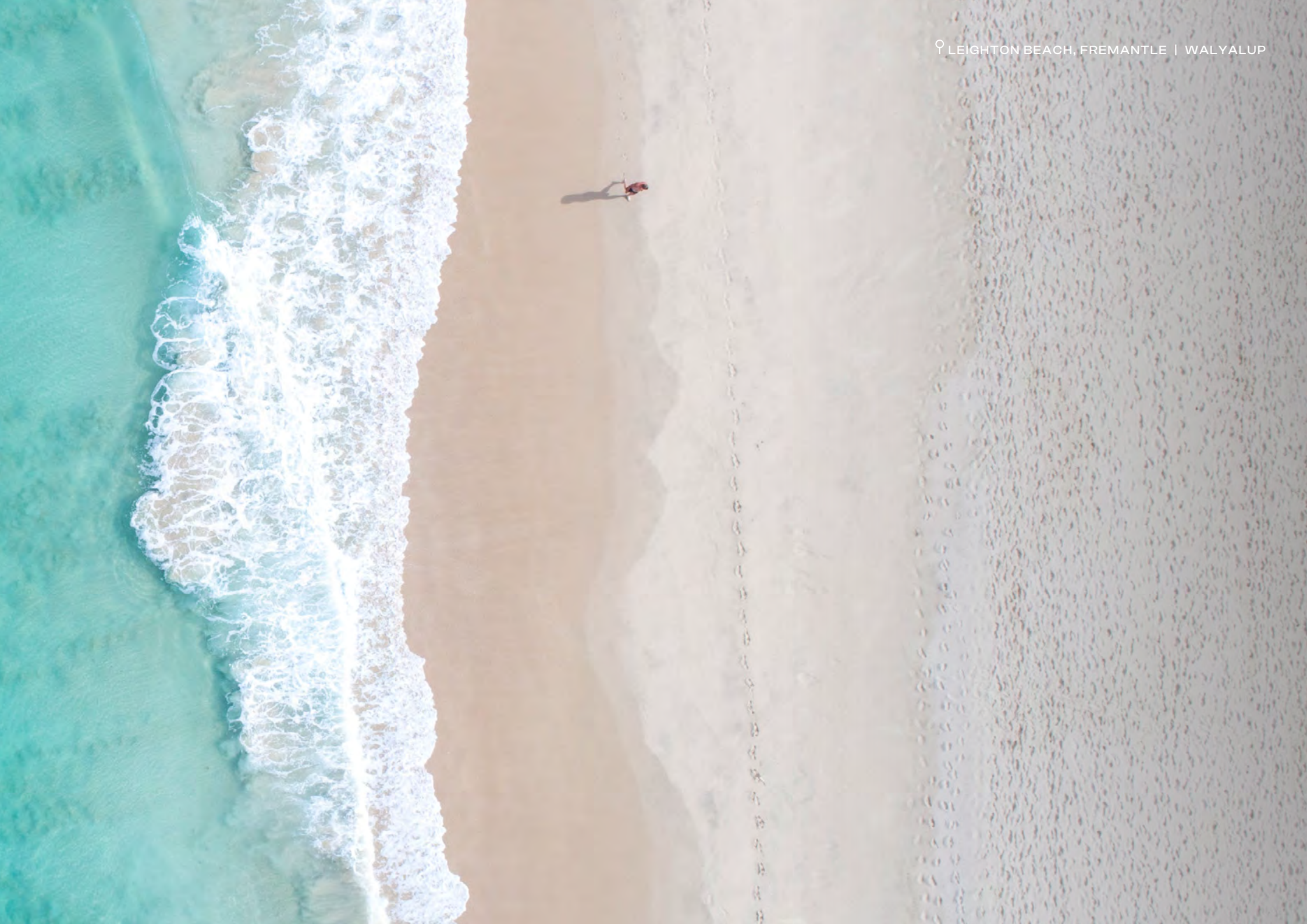
### Challenges

- There is a lack of coordination and cooperation across the region in developing packaged tour opportunities to attract the MICE market.
- There is currently a lack of cohesive leadership and governance across the entire region to drive development and investment.
- The community not valuing tourism or the opportunities it brings to the state, including not supporting tourism development and approval processes.
- There is currently a lack of coordination and collaboration in the development of key assets and connectivity for Perth and Surrounds, including a lack of targeted insights about how people experience the region.
- There is a need to establish stronger alliances within and across government and industry as the focal point of planning, investment, insight, community engagement and leadership.
- There is a lack of affordable accommodation, particularly in the city centre, to support workers in tourism and hospitality. Stakeholders also identified a need for clear pathways from school to tourism and hospitality careers, improved visa conditions, and marketing to make tourism and hospitality careers appealing.
- The need to improve customer servicing, staffing, skills, retention of staff and opening hours.



PART 4:  
STRATEGY & IMPLEMENTATION







## PRIORITY PROJECTS

Developing tourism requires a mix of ongoing capability building, support and significant, game-changing investment. The following projects have been identified through an analysis of stakeholder engagement and desktop research as having a maximum impact on the region to develop its brand, markets and product to maximise yield and improve visitor dispersal.









## THE WESTERN GATEWAY

### APPROACH

Pursue infrastructure upgrades at Perth Airport and Fremantle Port to further position Perth as Australia’s Western Gateway.

### RATIONALE

Perth Airport is the only international gateway in the state, and almost all interstate flights arrive into Perth. Fremantle Port is the most frequented port for cruise passengers, with all visiting cruise ships berthing at the Fremantle Passenger Terminal. Prioritising upgrades to the Airport and Port will help grow capacity and enhance the experience for visitors.

### ACTIONS

- Support the implementation of priority actions of the Perth Airport Master Plan, including construction of a new runway, international terminal upgrades, an airport hotel and construction of a new terminal to consolidate airline operations at the Airport Central Precinct.
- Continue to attract new inbound aviation routes and build capacity on existing routes to support visitation.
- Support the implementation of the WA Cruise Strategic Plan 2023–33.
- Deliver upgrades to the Port of Fremantle to address ageing marine infrastructure needs. Develop and implement cruise line attraction initiatives to continue to grow this sector and its economic benefits.





## PERTH CONVENTION & EXHIBITION CENTRE

### APPROACH

Invest in the Perth Convention and Exhibition Centre to increase its capacity and ensure it is accessible, high-quality and fit-for-purpose.

### RATIONALE

Attracting business events/MICE visitation is heavily contested and requires the availability of suitable facilities. The provision of world-class infrastructure will drive increased domestic and international visitation.

### ACTIONS

- Invest in the redevelopment of the Perth Convention and Exhibition Centre, ensuring that it is fit-for-purpose with connections to other attractions and the creation of a precinct/hub, capitalising on the Swan River.
- Integrate local food and beverage vendors and cultural heritage, and physically connect the centre with walkways to a suitable range of accommodation, as has been achieved with the International Convention and Exhibition Centre in Darling Harbour in Sydney.
- Support enhancement of a broader, well-connected Perth Convention Precinct to enable world-class convention experiences.





## PRECINCT ACTIVATION

### APPROACH

Support the development of new, or redevelopment and enhancement of existing, precincts to create vibrant, activated spaces that offer world-class visitor experiences.

### RATIONALE

The development of key infrastructure projects to activate tourism precincts will act as visitation drivers for the Perth and Surrounds region.

### ACTIONS

- Progress infrastructure upgrades at Victoria Quay and Fremantle Port to offer an appealing waterfront tourism precinct with commercial and hospitality offerings. Improve the connectivity between Victoria Quay and Fremantle city centre to encourage visitor dispersal and ease of access to these areas, including access to Rottnest Island via the ferry departure terminal.
- Support the delivery of the Aboriginal Cultural Centre in Perth City to showcase and celebrate WA's Aboriginal culture. Prioritise the centre's connection with the river and other key attractions within the city.

- Seek to establish new tourism opportunities on and around the Swan River. Explore the feasibility of enhanced riverfront amenity and improved activation of the riverfront, such as a billabong or lagoon-style pool set back from the river, with supporting hospitality and retail offerings, such as has been achieved in Brisbane's Southbank or Cairns Esplanade.
- Enhance the amenity and activation of Burswood Park through the development of new hospitality offerings and event/festival spaces.
- Support the revitalisation of the Perth Cultural Centre as a cultural heart of the city, with strengthened connections to and within the precinct, landscaping and development of under-utilised sites to enable performance/event spaces.
- Support the delivery of the Ocean Reef Marina development as a world-class tourism precinct, including a coastal pool and family beach, water-based recreation, hospitality and retail offerings.
- Seek the development of new food and beverage offerings, attractions and night-time activations at Elizabeth Quay and Yagan Square to support the night-time economy and enhance the vibrancy of the city centre.





## ACCOMMODATION INVESTMENT

### APPROACH

Attract targeted investment in short stay accommodation offerings across the Perth and Surrounds region.

### RATIONALE

The need to develop new accommodation and diversify the offering has been identified as a priority for all subregions. Growing the capacity and diversity of accommodation throughout the region will attract HYTs and enable tourism growth opportunities.

### ACTIONS

Support the delivery of accommodation to address specific subregional priorities including:

- The development of new accommodation on Rottnest Island including Lodge Wadjemup redevelopment and additional family-friendly, self-contained accommodation to meet demand, and exploring opportunities other unique/iconic accommodation offerings.
- The development of short stay accommodation within the Ocean Reef Marina precinct, and additional accommodation offerings in Scarborough.
- The development of a higher capacity branded hotel and new waterfront accommodation offerings in Fremantle.
- Opportunities to attract private sector investment in signature/unique accommodation in and around national parks and reserves.
- The development of experiential accommodation to support the Dwellingup, Bibbulmun and Munda Biddi trail networks.
- The development of new short stay accommodation offerings that support the region's naturally adventurous vision, such as glamping, eco, trail-based and farm stays





## LEVERAGE EVENT OPPORTUNITIES

### APPROACH

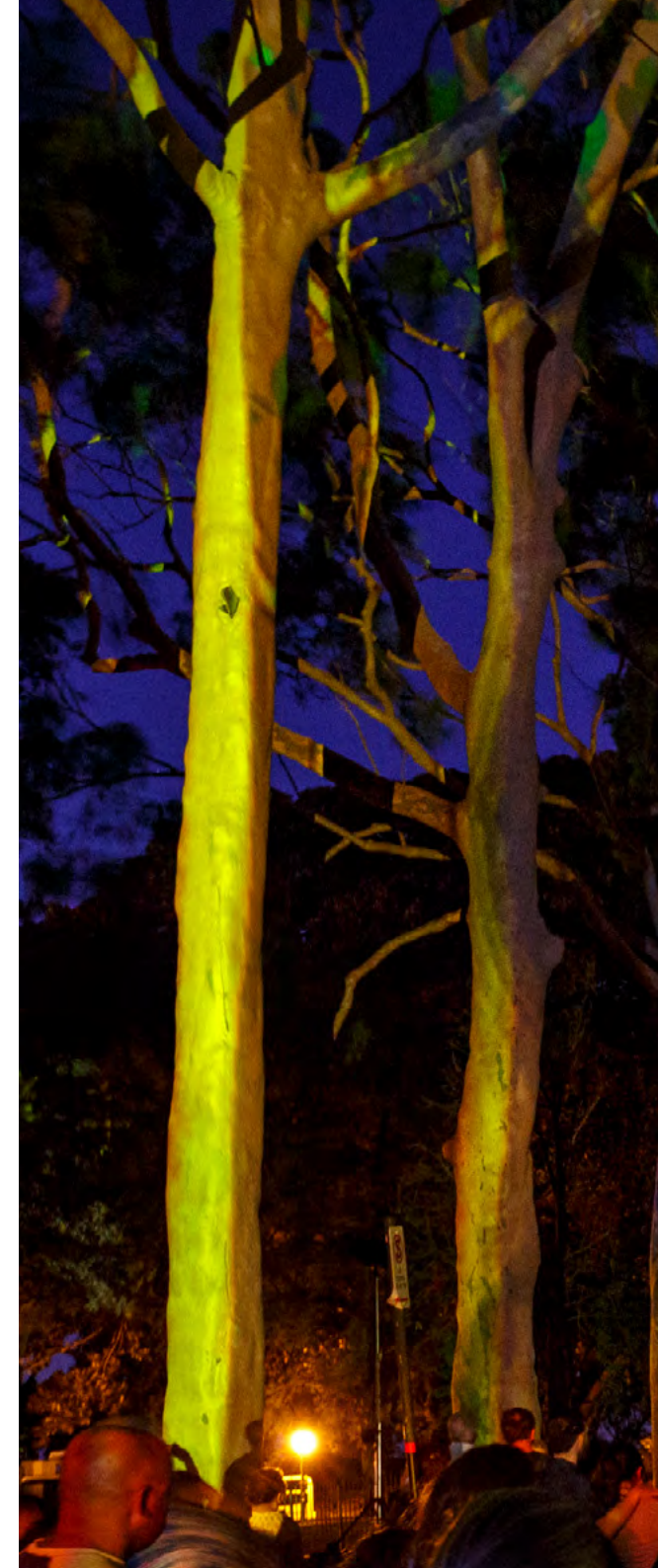
Establish Perth and Western Australia as the fastest growing events destination in the South East Asian region through the development of quality infrastructure and attraction of world-class sporting, cultural and arts events.

### RATIONALE

Events are a key visitation driver, giving time specific reasons to visit and enhancing the vibrancy of a destination. Enhancing event infrastructure will assist in attracting a diverse range of events that disperse visitors and establish Perth and Surrounds as an 'always-on' destination.

### ACTIONS

- Continue to attract a diverse range of blockbuster events that drive visitation, and support a year-round calendar of community, culinary, cultural, sporting and mass participation events that enhance the vibrancy of the Perth and Surrounds region.
- Deliver and expand homegrown events that celebrate place, people and culture, including EverNow.
- Support development of new world-class infrastructure including cultural, entertainment and sporting precincts to assist in luring high-profile events to Perth and Surrounds. Seek to enhance infrastructure in Kings Park to enable new event opportunities.
- Develop and deliver a calendar of events and festivals that highlight unique subregional strengths and encourage dispersal.
- Explore the feasibility of delivering a major activation/installation for the Swan Valley, complemented by seasonal events.









# DP ACTION PLAN

The DP TDMP Action Plan has been informed by the subregional priorities developed through industry consultation. The following tables outline actions and projects and the partner agencies/stakeholders responsible.

## 1. DELIVER A COHESIVE VISITOR EXPERIENCE BY OFFERING A DIVERSE RANGE OF PRODUCTS AND ATTRACTIONS

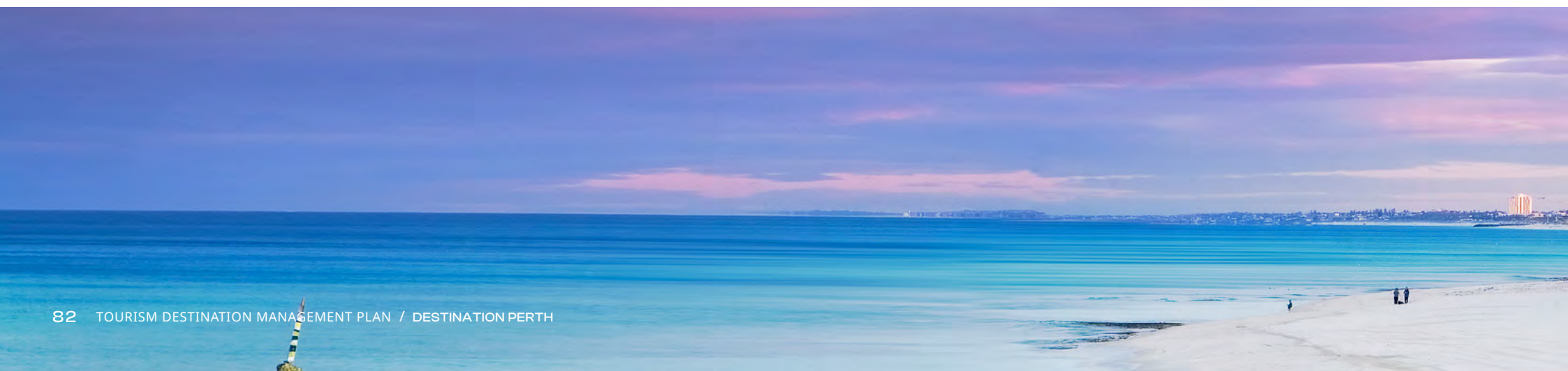
INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>ADDRESSING SUPPLY ISSUES</b>			
<b>Investigate and deliver new tourism assets that encourage increased length of stay and dispersal.</b>	BGPA, CoP, TWA, DoT	Determine the feasibility of developing a pedestrian/cycle bridge connecting Kings Park to the river near to the Swan Brewery.	Perth City
	LGAs, DP, WAM	Develop additional after dark tourism product/experiences including weekend inner-city activation to support the night-time economy.	
	DBCA, TWA, DoT, LGAs, DevWA, DPLH, WAITOC	Deliver priority actions for tourism in the Perth Water Buneenboro Action Plan, including new nature-based and Aboriginal tourism experiences on and around the Swan River.	
	PS, DBCA, TWA, CoP	Seek to enhance riverfront amenity in the city centre, including new hospitality offerings and tourism assets such as a billabong or lagoon-style pool adjacent to the Swan River.	
	DBCA, PS, LGAs, DPLH, DoT	Explore opportunities to further activate areas of the river outside of the city centre with attractions such as riverside parks, tracks and trails, boat tours, river-facing outdoor spaces, cafés and restaurants.	Throughout region
	TCWA, PS, CoP, BGPA, DevWA	Investigate opportunities for private sector development of a cable car, or similar, to enable an experiential link between Kings Park and Elizabeth Quay as a signature experience.	Perth City
	TWA, WAM	Progress the relocation of the WA Visitor Centre in a state-of-the-art facility with stronger connections to the city, rail, walkways and the Perth Cultural Centre precinct.	
	DLGSC, DPC, DPLH, TWA, DevWA, CoP, WAM, SLWA, AGWA	Revitalise the Perth Cultural Centre to improve access, connections between key attractions and enhance the visitor experience to establish the precinct as the cultural heart of the city.	
	PS, SVTA, CoS, TWA	Support the development of immersive tourism experiences in the Swan Valley that showcase the story of the subregion's culture, history and food and drink provenance, including exclusive meet-the-maker experiences.	Swan Valley
TWA, CoS	Investigate the feasibility of a large scale art installation/trail in the Swan Valley to encourage increased visitation and dispersal.		



INITIATIVE	PARTNERS	ACTION	SUBREGION
	DPLH	Seek funding to implement the Fremantle Prison Master Plan 2019–2029 to deliver high quality, unique experiences including a sound and light show.	Fremantle and Rottneest
	LGAs, RIA, PS, DP	Leverage Fremantle and Rottneest Island's heritage through the development of new Aboriginal culture and military heritage tourism offerings.	
	DP, LGAs, PS	Explore opportunities to develop rail-based all-inclusive packaged experiences in the Avon Valley combined with other tours and experiences such as dining, trails, hot air ballooning, accommodation, to better connect the individual towns and encourage visitor dispersal.	Avon Valley
	PS, LGAs	Grow the density of dark sky tourism experiences in areas with minimal light pollution to enable packaging of product and encourage visitor dispersal.	Avon Valley, Perth Hills, Peel
	LGAs, PDC	Encourage the development of new and innovative eco and nature-based tourism experiences that showcase the natural assets of the Peel region.	Peel
	TWA, LGA, DBCA	Prepare a business case for a Rockingham Discovery Centre.	Rockingham
	WAM	Support the redevelopment/refurbishment of the WA Shipwrecks Museum with new exhibits, attractions and spaces to leverage the 400th anniversary of Batavia in 2029.	Fremantle and Rottneest
	FPA, DPLH, CoF, DoT, WAM	Progress infrastructure upgrades at Victoria Quay and the Fremantle harbours to continue to receive cruise ships and deliver an appealing waterfront tourism precinct, including consideration for ferry operator requirements. Explore opportunities to enhance connectivity between the precinct and Fremantle city centre through streamlined access and wayfinding.	
	DevWA, LGA	Support the delivery of the Ocean Reef Marina development including a coastal pool and family beach, water-based recreation, hospitality, retail and short stay accommodation offerings.	Sunset Coast
	Burswood Park Board	Develop the “three precincts” vision as highlighted in the Burswood Park Master Plan to enhance amenity, deliver new event spaces and opportunities for new hospitality developments.	Perth City
	ZPA	Deliver the enhancements to the Perth Zoo as highlighted in the Perth Zoo Master Plan 2040, including expanded exhibits with immersive visitor experiences. Explore opportunities for the development of on-site short stay accommodation.	
	LGA, PS	Support the implementation of the Pinjarra Heritage Railway Precinct Master Plan and associated Pinjarra to Dwellingup Heritage Rail Link Project.	Peel
	PS, DP, TWA, WAM	Explore opportunities for virtual reality (VR) and augmented reality (AR) innovation in product and experience development.	Throughout region
	LGA, PDC, DLGSC, DBCA	Continue to integrate trail development with major transport networks, establishing other trail towns to complement Dwellingup and evolve the visitor focus on nature-based adventure tourism.	Peel, Perth Hills
	LGAs, PDC, DBCA, TWA, PS	Explore opportunities to develop additional water-based tour products, such as houseboat hire, overnight and day tours including stops at local hospitality venues, and exploration journeys, with an emphasis on local seafood, produce, wildlife and connections to Country.	Peel



INITIATIVE	PARTNERS	ACTION	SUBREGION
	CoP, DevWA	Encourage the development of new food and beverage offerings, attractions and night-time activations at Elizabeth Quay to position the precinct as the café/restaurant and night-time hub of the city.	Perth City
<b>Enhance tourism experiences and infrastructure in national parks and reserves.</b>	DBCA, LGAs	Continue delivery of the John Forrest National Park Improvement Project including enhanced accessibility, amenities and a park hub/interpretive space.	Perth Hills
	TWA, DBCA, PS	Grow the range of bookable adventure, nature-based and ecotourism product in national parks, regional parks and nature reserves around the region to better deliver the naturally adventurous vision.	Throughout region
	LGA, DBCA, PDC	Enable new ecotourism opportunities in Yalgorup National Park through the development of visitor infrastructure and trails.	Peel
	BGPA, TWA, WAITOC, DP, PS	Facilitate the development of new commissionable tourism product/experiences in Kings Park, including night-time-activation, wildflower tours, and an Aboriginal tourism hub offering cultural experiences.	Perth City
	BGPA, TWA	Investigate the feasibility of a redeveloped tourism hub in Kings Park that provides facilities for tour operators and visitors including consideration of short stay accommodation.	
	DBCA, BGPA	Investigate and provide for visitor infrastructure in national parks and reserves including: Kings Park; Yanchep, Avon Valley, Walyunga, John Forrest, Lesmurdie Falls, Serpentine and Yalgorup national parks; Cape Peron Coastal Park; Lane Poole Reserve; Woodman Point, Yellagonga and Herdsman Lake regional parks; and parks of the Swan Coastal Plain.  Enhance visitor experiences and understanding of natural and cultural values in national parks through improvements to interpretive information and experiences.	Throughout region





INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>ADDRESSING DEMAND ISSUES</b>			
<b>Develop marketing initiatives to promote subregional dispersal and increased length of stay.</b>	DP, LTOs, LGAs	Highlight the diversity of experiences offered throughout the subregions to position them as destinations for short breaks/longer stays rather than only day-trips.	Throughout region
	DP, LGAs	Build on existing LGA alliances to leverage and cooperatively market tourism products and share content, imagery, and videos to collectively promote the region.	
	DP, PS	Explore the opportunity to establish a regional program to connect restaurateurs with local producers and collaborate on ideas around how to highlight seasonal and local produce offerings in the region.	
	WAM, TWA, DPIRD, DLGSC	Continue to provide enhancements to, and maintenance of visitwonderland.com.au to promote visitor dispersal and increase visibility of the Peel and Wheatbelt regions' unique collection of heritage, art and cultural offerings.	
<b>ADDRESSING CAPABILITY ISSUES</b>			
<b>Grow the capacity and capability of the industry to understand target market needs.</b>	TWA, TCWA, DP, DBCA	Develop resources and workshops on themes including: visitor market preferences; accessing the MICE market; the luxury traveller; ecotourism accreditation; and developing outstanding interpretation with case studies and brand guidelines to assist operators and investors in creating brand aligned, high-yield tourism experiences.	Throughout region
	TWA, LGAs	Deliver targeted capacity building workshops that support diversification of existing agricultural businesses to incorporate agritourism offerings.	
	LTOs, DP, LGAs	Undertake experience development programs to support expansion of product packaging, new and expanded experiences and partnerships between operators across the region.	
	DP, LGAs, LTOs, tourism industry	Communicate opportunities for LGAs, LTOs and industry to participate in the Destination Perth RTO's industry development initiatives.	



COTTESLOE BEACH, PERTH

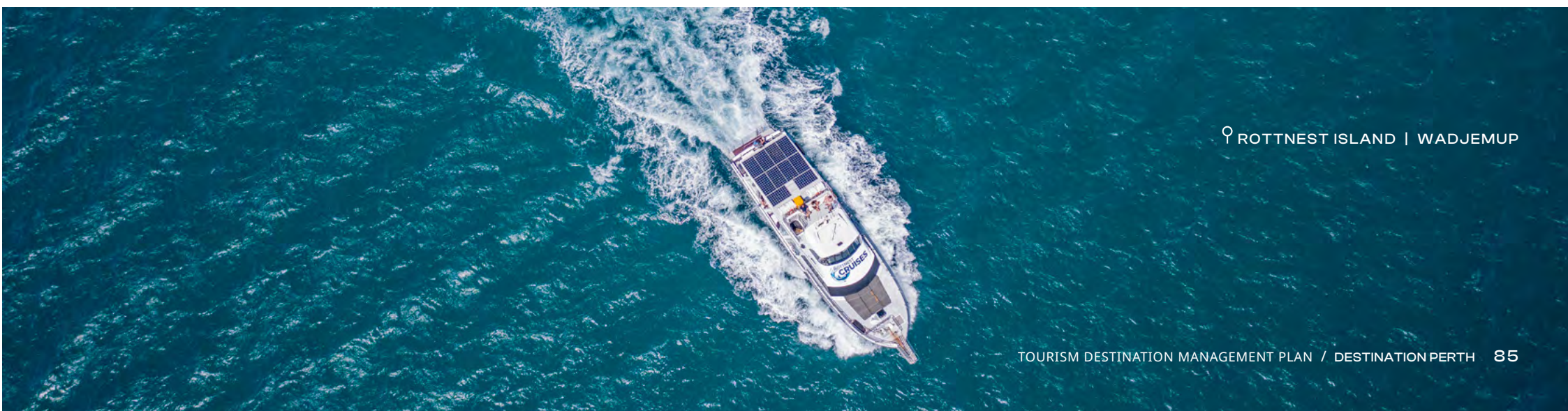


## 2. INCREASE CAPACITY AND CONNECTIVITY TO SUPPORT ACCESS TO AND WITHIN THE REGION

INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>ADDRESSING SUPPLY ISSUES</b>			
<b>Pursue airport upgrades and additional air services to grow leisure visitation.</b>	Perth Airport, State Government	Support the implementation of the Perth Airport Master Plan, including the construction of a new runway, airport hotel, terminal upgrades, and consolidation of services at the Airport Central Precinct.	Perth City
	TWA, Perth Airport	Continue to pursue direct flights from identified source markets and build capacity on existing routes.	
<b>Support upgrades to connectivity through transport infrastructure and signage to facilitate visitor dispersal.</b>	LGAs, DoT, TWA, DP	Investigate the feasibility of new transport options such as mid-tier rapid transit to Scarborough, providing enhanced connectivity from Perth Airport to the coast.	Sunset Coast
	DoT, LGAs, DBCA	Develop consistent, brand-aligned wayfinding and signage that incorporates local heritage, stories and imagery of key attractions.	Throughout region
	PS, DP, TWA	Encourage private operators to establish transport services to and from the subregions including airport transfers and coordinated transfers/tours to tourism attractions from public transport hubs.	
	LGAs, DBCA, DoT	Determine the feasibility of new cycle networks along the Swan and Canning Rivers including a riverside cycle and walking path / trail linking Fremantle to the Swan Valley.	Throughout region
	PTA, DoT, LGAs	Subject to feasibility assessment and informed by a strategic demand analysis, seek to expand the public/private ferry network with higher volume services to access a range of points along the river, including outside of the city centre.	
	LGAs, DP	Seek to improve wayfinding to Cottesloe Beach from Cottesloe rail station that is also highlighted at Perth train station.	Sunset Coast
	LGAs, PS, DBCA	Support an expansion of the electric vehicle network and availability of chargers throughout the region to ensure accessibility and encourage sustainable transport options.	Throughout region
	DBCA, MRWA	Ensure safe access to national park destinations through strategic investment in roads to key destinations, with a particular focus on highly visited parks in and near Perth.	
	DoT, CoF, FPA, TWA, DPLH	Improve access and connectivity between the harbours, Victoria Quay, Fremantle Port and the Fremantle city centre as identified in the Fremantle Harbours Master Plan (2022).	Fremantle and Rottneest
<b>Pursue improvements in mobile connections to overcome inconsistent service.</b>	LGAs, ACMA, DBCA, Australian Government	Advocate for installation of high-speed internet and improved mobile telecommunications in areas with inconsistent/lacking services to address gaps and improve the visitor experience.	Throughout region



INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>Maximise tourism benefits from infrastructure upgrades.</b>	CoF, RIA, TWA	Progress works to improve the experience and facilities at the Rottneest ferry departure terminal in Fremantle. Refurbish the facilities and visitor arrival facilities at Rottneest Island.	Fremantle and Rottneest
	SVTA, LGAs, DP, TWA	Advocate for solutions to the siltation that hampers accessing the upper reaches of the Swan Valley and Guildford via the Swan River which could result in a highly unique river-based experience including accessing the food, wine and broader attractions of the subregion.	Swan Valley
<b>Drive the sustainable growth of cruise tourism.</b>	FPA, TWA	Support the implementation of the WA Cruise Strategic Plan 2023–33. Progress delivery of infrastructure upgrades at Port of Fremantle to address ageing marine infrastructure needs and ensure continued growth of cruise tourism.	Fremantle and Rottneest
	DevWA, PS	Explore opportunities to expand specialist cruise tourism at the new Ocean Reef Marina, with capacity to accommodate superyachts.	
	FPA, TWA	Actively seek to attract new home-ported vessels to Fremantle Port, including mid-size, large and expedition ships.	
<b>ADDRESSING DEMAND ISSUES</b>			
<b>Promote transport options to remove perceived travel barriers and encourage visitor dispersal.</b>	DP	Develop initiatives to inform visitors on how to access and navigate the region, including cross-regional itineraries, with two, three and five-day experiences, to encourage longer stays.	Throughout region
	DP, PTA	Promote public transport options through initiatives such as public transport trails or itineraries, including key attractions to remove perceived travel barriers and encourage subregional dispersal.	



📍 ROTTNEEST ISLAND | WADJEMUP



### 3. GROW AND DIVERSIFY THE ACCOMMODATION OFFERING BY ADDRESSING GAPS AND PRIORITIES

INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>ADDRESSING SUPPLY ISSUES</b>			
<b>Grow the inventory of short stay accommodation</b>	TWA, LGAs DP, LTOs, DBCA	Encourage operators to renovate/renew existing accommodation offerings and seek the development of more diverse accommodation including eco, glamping, trail-based or farm stays.	Throughout region
	TWA, DBCA, TOs, ACs, PS, LGAs	Work with Traditional Owners and the private sector to realise the development of accommodation offerings in and around national parks and reserves.	
	RIA, PS, TWA	Support the development of a range of additional accommodation on Rottnest Island as identified in the Rottnest Island Management Plan (RIMP) 2023–28.	Fremantle and Rottnest
	LGAs, PDC, PS, TWA, DBCA	Seek the development of experiential accommodation (e.g. glamping, tiny houses and nature-based) offerings to support and activate the Dwellingup, Jarrahdale, Bibbulmun and Munda Bidli trail networks.	Perth Hills, Peel
	CoF, PS, TWA	Seek the development of a higher capacity branded hotel in Fremantle to address constraints and enable further opportunity for business events.  Explore opportunities to plan for new waterfront short stay accommodation at Fremantle's North Port once freight operations are relocated through the Westport project.	Fremantle and Rottnest
	LGA, PS, DBCA	Diversify accommodation offerings in Rockingham, including development of unique eco accommodation at Cape Peron, high quality branded accommodation suited to MICE visitation in the Rockingham foreshore, and short stay accommodation near the Waikiki foreshore.	Rockingham
	LGAs, PS	Investigate opportunities for the development of new riverside accommodation offerings along the Swan River.	Perth City
	TWA, LGAs	Deliver a Perth Accommodation Study to identify gaps in the market and seek to attract private investment in new short-stay accommodation.	
	LGAs, DP, PS, WDC, TWA, DPLH, DBCA	Investigate opportunities for heritage assets to be reused or adapted into tourism accommodation.	Throughout region





INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>Develop affordable and worker style accommodation.</b>	LGAs, TWA	Advocate for the development of affordable accommodation to support international students and low-income and casual workers.	Throughout region
	LGAs	Encourage larger accommodation projects to include on-site staff accommodation to combat a lack of residential housing.	
<b>Create an effective and easily navigable regulatory environment to enable investment.</b>	TWA, DevWA LGAs, DP	As part of the Streamline WA initiative, advocate for solutions to create an enabling environment for investment and site availability.	Throughout region
<b>ADDRESSING DEMAND ISSUES</b>			
<b>Promote investment opportunities.</b>	TWA, LGAs	Develop targeted accommodation prospectuses that encourage investment in the development of new short stay accommodation throughout Perth and Surrounds.	Throughout region
<b>ADDRESSING CAPABILITY ISSUES</b>			
<b>Advocate for tourism focused land use planning.</b>	TWA, DPLH	Deliver a Swan Valley Tourism Planning Strategy that assesses gaps and opportunities for tourism product/ accommodation and informs future land use planning.	Swan Valley
	TWA, LGAs, WAPC, DPLH	Advocate for greater consideration of tourism in local planning strategies and policy frameworks.	Throughout region



LAKE NAVARINO, WAROONA



#### 4. ESTABLISH PERTH AND SURROUNDS AS A MAJOR HUB FOR WORLD-CLASS SPORTING, CULTURAL, BUSINESS AND ARTS EVENTS

INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>ADDRESSING SUPPLY ISSUES</b>			
<b>Grow the calendar of events in Perth and Surrounds.</b>	TWA	Deliver and expand homegrown events that celebrate place, people and culture, including EverNow in Perth City.	Perth City
	LGAs, TWA, BGPA, WAM	Elevate local cultural events and invest in major cultural and linguistically diverse events to activate the river and natural areas, particularly Kings Park, Burswood Peninsula and the Perth Cultural Centre.	Throughout region
	PS, State Government, LGAs, TWA, BEP	Redevelop the Perth Convention and Exhibition Centre with consideration of future market needs and purpose-aligned facilities to support the business and events tourism markets. Support the creation of a precinct/hub with connections to other city-based attractions, and inclusion of water views.	Perth City
	TWA	Continue to attract a diverse range of blockbuster events that drive visitation, and support a year-round calendar of community, culinary, cultural, sporting and mass participation events that enhance the vibrancy of the Perth and Surrounds region.	Throughout region
		Establish a Metro Events program that supports the delivery of homegrown events within the metropolitan region.	
WAM	Support development and hosting of world-class touring exhibitions at WA Museum Boola Bardip to maximise built infrastructure and enhance the cultural vibrancy of Perth.	Perth City	
<b>Enhance infrastructure to support growth of events.</b>	BEP, LGAs, TWA, DP	Based on an assessment of the capacity of existing infrastructure and venues, identify opportunities to upgrade and/or maximise infrastructure to target the specific business events markets that the region could uniquely fill.	Throughout region
	BGPA	Seek to enhance infrastructure in Kings Park to enable new event opportunities and leverage its positioning as a key visitor attraction.	Perth City
	DBCA	Seek to enhance infrastructure in Yanchep National Park to enable new event opportunities.	Sunset Coast
	TWA, State Government	Support the development of new world-class infrastructure to attract high-profile events to Perth and Surrounds.	Throughout region
<b>ADDRESSING DEMAND ISSUES</b>			
<b>Promote events to encourage dispersal.</b>	DP, LGAs, LTOs, DBCA	Strengthen the promotion of festivals and events that establish the Perth and Surrounds region as a vibrant destination for year-round festivals and business events.	Throughout region
<b>Assess event marketing communications to maximise awareness and visitation.</b>	PS, LGAs	Collaborate with LGAs to better activate events through promotion and signage to showcase the value of tourism.	Throughout region
	TWA, PS	Optimise event branding to align with Tourism WA initiatives, whenever feasible.	
<b>ADDRESSING CAPABILITY ISSUES</b>			
<b>Develop industry capability to maximise event opportunities.</b>	TWA, PS, LGAs	Work with event holders and industry operators to develop event-based packages that include discounted accommodation and attractions. Establish a knowledge and skills-sharing program amongst local event operators to enhance industry sustainability.	Throughout region



## 5. DEVELOP AND SHOWCASE ABORIGINAL TOURISM

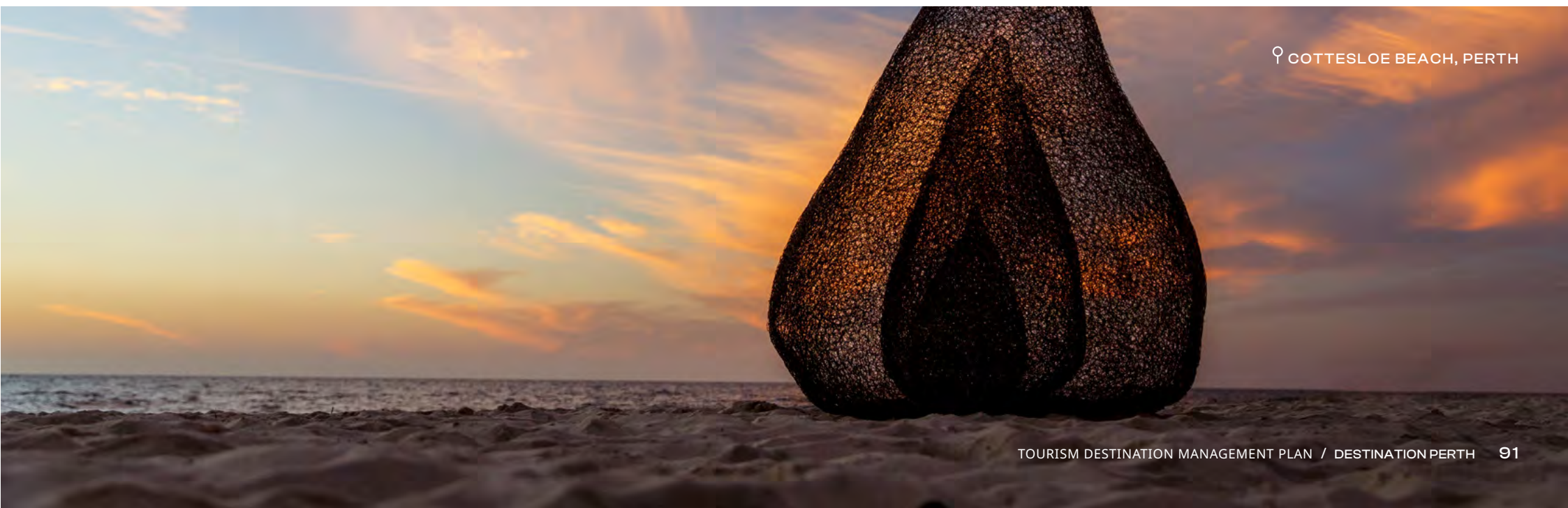
INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>ADDRESSING SUPPLY ISSUES</b>			
<b>Develop authentic Aboriginal tourism experiences across the region.</b>	DLGSC, DoF, DPC, TWA, CoP	In partnership between Aboriginal people and the State Government, facilitate the development of an Aboriginal Cultural Centre with world-class interpretation of the state's Aboriginal culture, storytelling and truth-telling. Prioritise the centre's connections across the city and Swan River, including other major attractions with links to transport and wayfinding.	Perth City
	WAITOC, TWA, TOs, ACs, DP, RIA, DBCA, LGAs, LTOs, PDC, WDC	Support the sustainability of existing and establishment of new Aboriginal tourism businesses.	Throughout region
		Ensure engagement, inclusion and representation of Aboriginal tour operators in mainstream tourism businesses and special events planning and programming.	
	TWA, WAITOC	Implement priority actions from the Jina: WA Aboriginal Tourism Action Plan 2021–2025 (or future editions). Continue to expand visibility of Aboriginal cultural welcomes in key access points and gateways throughout the region.	
	DBCA, LGAs, TOs	Expand interpretive signage across the region and in national parks that recognises culturally significant sites and traditional place names, to create the foundation for education and awareness including connecting places and experiences.	
WAM, DLGSC	Secure funding to continue commissions for the Aboriginal Public Art Program at WA Museum Boola Bardip.	Perth City	
<b>ADDRESSING DEMAND ISSUES</b>			
<b>Deliver targeted marketing and promotions for Aboriginal tourism.</b>	DP, WAITOC, TWA	Continue to raise the profile and awareness of existing Aboriginal tourism operators and experiences through marketing and promotion.	Throughout region
<b>ADDRESSING CAPABILITY ISSUES</b>			
<b>Increase hospitality and tourism training and employment opportunities for Aboriginal people.</b>	TWA, WAITOC, DBCA	Develop initiatives and programs to encourage Aboriginal people to consider participation and careers in tourism and hospitality throughout the region.	Throughout region
		Facilitate collaborations for Aboriginal people to work with mainstream tour operators in a consultative role or direct employment to deliver cultural content.	

## 6. FOSTER COLLABORATION ACROSS THE TOURISM INDUSTRY TO GROW THE VISITOR ECONOMY AND ENSURE ITS SUSTAINABILITY

INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>ADDRESSING SUPPLY ISSUES</b>			
<b>Facilitate pathways to careers in tourism and hospitality.</b>	TWA, DTWD, FutureNow, AHA	Progress investigations regarding interest for establishing a world class tourism and hospitality management school in Perth.	Throughout region
<b>ADDRESSING DEMAND ISSUES</b>			
<b>Maximise awareness of tourism and hospitality as employment options.</b>	TWA, DP	Raise awareness of the WA Jobs website as the main portal for tourism and hospitality jobs.	Throughout region
		Develop targeted campaigns towards seasonal work opportunities with backpackers/ travellers.	
<b>Grow awareness and market presence of high quality tourism products.</b>	TWA, TCWA	Promote high quality visitor experiences, and encourage enhancements in business quality/sustainability through the Dream Collective recognition program.	
	TWA, Industry	Assist trade ready operators to establish in-market relationships, attend trade events and strengthen WA's market presence through the Trade Ready Introduction Program (TRIP).	
<b>ADDRESSING CAPABILITY ISSUES</b>			
<b>Develop a connected and collaborative tourism industry.</b>	DP, TCWA, LGAs	Conduct regular networking events that unify the industry and LGAs within subregions to build collective understanding, linkages and cooperative opportunities.	Throughout region
	LGAs, DP	Strengthen existing and seek to establish new tourism alliances within the subregions to leverage resources and deliver a shared vision. Develop more cross-regional initiatives to promote and strengthen Perth and Surrounds as a destination.	
<b>Increase the number of tourism providers participating in eco and sustainable practices.</b>	TCWA, TWA, DP	Support tourism operators to become more sustainable and consider engaging with an ecotourism accreditation program	Throughout region
	TWA, DP, LGAs, TCWA, State Government	Engage with other industries and government across the region to develop a sustainability/regenerative ethos that will underpin the naturally adventurous vision. This may include: considering biodiversity indicators; innovative public and private infrastructure designs; electric buses; circular economy initiatives; organisational values; organic certification of food and beverages; and vehicle dependency.	



INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>Implement Tourism WA's workforce development strategies.</b>	TWA, DTWD	Support and facilitate training and development opportunities across the region to increase the pool of tourism workers: <ul style="list-style-type: none"> <li>• Seek a closer connection to the regional workforce through tourism and hospitality job portals, programs, incentives and campaigns.</li> <li>• Support industry involvement in raising the profile of career opportunities in tourism.</li> <li>• Develop recognised pathways to support career opportunities in tourism.</li> <li>• Position Aboriginal tourism as a significant employment avenue.</li> </ul>	Throughout region
<b>Elevate industry capacity and capability to enhance the visitor experience.</b>	LGAs, CCIs, WDC, TWA	Consider collaborative approaches to utilise the existing workforce within LGAs, including sharing resources and rostering opening hours for businesses to ensure tourism services are delivered.	Avon Valley
	TCWA, TWA	Increase the number of tourism businesses with accessible tourism accreditation by: <ul style="list-style-type: none"> <li>• Educating the industry on the increasing importance of accessible and inclusive tourism; and</li> <li>• Providing resources to assist industry to meet the needs of accessible markets.</li> </ul>	Throughout region



📍 COTTESLOE BEACH, PERTH

## 7. STRENGTHEN THE POSITIONING OF DESTINATION PERTH THROUGH COLLABORATIVE MARKETING WITHIN AND ACROSS THE REGION

INITIATIVE	PARTNERS	ACTION	SUBREGION
<b>ADDRESSING DEMAND ISSUES</b>			
<b>Promote a DP Brand and Style Guide and relevant toolkits, which utilises and aligns to Tourism WA's global brand strategy and toolkits.</b>	DP, TWA	Strengthen the connection between the Destination Perth RTO brand and the Tourism WA global brand through promotion of aligned brand and style guides/narratives.	Throughout region
<b>Align marketing initiatives to promote subregional dispersal and increased length of stay.</b>	DP, TWA	Undertake a review of promotional content for the Perth and Surrounds subregions across all media platforms and channels to identify areas for content improvement and consistency between the Destination Perth RTO and Tourism WA brands.	Throughout region
		Develop collaborative marketing initiatives that leverage experience pillars (food and wine, aquatic and coastal, nature and wildlife, arts, culture and heritage) across the Perth and Surrounds region to remove subregional barriers and promote a cohesive experience.	
		Capture additional intrastate visitation with new stories and compelling experiences to continue the growth of this market.	
<b>Increase the density of trade ready tourism products in the region.</b>	DP, TWA, ATEC	Assist existing operators not currently operating in the trade distribution space to become export/trade-ready. Work with industry to establish new export/trade-ready and commissionable tourism products to grow awareness and demand for the region.	Throughout region
<b>ADDRESSING CAPABILITY ISSUES</b>			
<b>Foster collaboration and information sharing to ensure consistent brand positioning.</b>	TWA, DP, LGAs, PDC, WDC, DBCA	Combine insights with real-time data including time-space movement data to enhance understanding of existing markets. Use this data to: <ul style="list-style-type: none"> <li>Educate operators and decision makers about the needs of HYTs; and</li> <li>Inform product development and marketing initiatives.</li> </ul>	Throughout region
	DP, LGAs, TWA, PDC, WDC, tourism industry	Instigate an ongoing annual or biannual workshop with LGAs, tourism alliances and operators across the region to explain how the subregions work within the Perth and Surrounds and Tourism WA story, with the aim to foster cooperation and highlight the importance of stakeholder take-up and co-branding opportunities and alignment to the DP and Tourism WA brand positioning.	



