

TOURISM WESTERN AUSTRALIA CORPORATE PLAN 2024-25



Tourism
WESTERN AUSTRALIA

WESTERN
AUSTRALIA
WALKING ON A DREAM

♀ KARIJINI NATIONAL PARK, THE PILBARA

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ACKNOWLEDGEMENT OF COUNTRY

Tourism Western Australia acknowledges Aboriginal peoples 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.



CHAIR'S MESSAGE

Western Australia is re-establishing its growth trajectory post the COVID-19 pandemic.

2024-25 is the second year of the Western Australia Visitor Economy Strategy (WAVES 2033), which will guide us through the next 10 years of transformation and growth. Officially launched in February 2024, the strategy aims to generate a step change in our visitor economy and deliver a significant contribution to Western Australia's economic growth and employment over the next decade. It aligns with the Western Australian Government's FutureState and DiversifyWA frameworks, where tourism, events, and regional development are key pillars to broaden the state's economic base and growth opportunities. WAVES 2033 is a whole-of-government approach which will unlock the value of the visitor economy through collaboration across government agencies and industry.



Tourism WA had an incredible 2023-24, delivering projects to underpin and activate the industry across aviation, destination development, events, marketing, and strategy and engagement. The highlights included:

- Securing the return of a non-stop aviation service from China, which marked the 20th international destination with non-stop connections to Perth.
- The successful launch of four Walking On A Dream sub-campaigns, Where Dream Events Happen to promote an always-on events calendar, Drive the Dream with Formula 1 driver Daniel Riccardo highlighting road trips, Connect with Culture raising the profile of Aboriginal experiences, and Your Dream Working Holiday to target potential working holiday makers internationally.

- The inaugural homegrown event EverNow held in October 2023 – a free community festival to celebrate Aboriginal culture.
- Hosting blockbuster, Australian-exclusive events, including Coldplay, WWE Elimination Chamber: Perth and FIFA Women's World Cup matches, attracting significant numbers of out-of-state travellers and global headlines for Western Australia.
- Continued implementation of the Jina: WA Aboriginal Tourism Action Plan 2021 – 2025 and the opening of a new Camping with Custodians campground at Lombadina.
- The successful Workforce Development Program – visiting schools, hosting workshops, and providing education and training across the regions for career development throughout the industry.
- The facilitation of attractions and experiences through the National Parks Tourism Experience Development program (NPTED) and the establishment of the Tourism Investment Committee of Cabinet (TICC), which will drive real change through streamlined approval processes and enabling private sector investment.
- The launch of two industry operator programs – the Trade Ready Induction Program (TRIP), supporting tourism operators establish an international market presence, and The Dream Collective, to promote and acknowledge the state's leading tourism operators.
- Commencement of the Western Australia Cruise Strategic Plan 2023-2033, ahead of the state's largest cruise season on record.

CHAIR'S MESSAGE CONTINUED

With a record state budget of more than \$500 million to 2027-28, Tourism WA already has a huge pipeline in place. In October, we will host 300 global travel sellers as part of G'Day Australia and the World Travel & Tourism Council Global Summit (WTTC), the most prestigious global event of its kind. WTTC provides the opportunity for international investors, global aviation leaders, and the largest players in the international travel sector to consider future long-term commitments in our state. Also in aviation, Routes Asia 2025 will be held in Perth, which is perfectly timed with the recent landmark agreement between Perth Airport and Qantas to provide much needed capacity for additional direct routes into Perth, a key determinant of visitor demand.

The other key demand driver in attracting visitors is through events. We have an ever-expanding calendar of blockbuster arts, culture and sports events booked through to 2028. In the second half of 2024, we will host four major Australian-exclusive events – the TIME: RONE exhibition, UFC 305, HoopsFest and the Perth International Football Cup.

These are underpinned by our signature homegrown events – EverNow, will be in its second year, and will be joined by two more new homegrown events, a wine and food celebration with Pair'd Margaret River Region in Australia's South West, and RE//Perth, focusing on arts and culture during winter. The aim is for these events to become major destination drawcards in their own right for locals as well as interstate and international visitors.

Boosting our exposure, the promotion of Western Australia to the world will continue in earnest, using the highly successful Walking On A Dream destination brand and supporting sub-campaigns. The marketing assets and distribution channels are innovative and sophisticated and will deliver long-term benefit to the state.

These are only a snapshot of the existing secured and funded events, projects, and programs which are setting Western Australia up for a highly anticipated growth phase over the next decade and I look forward to sharing new announcements throughout the year.

Di Bain
Chair
Tourism Western Australia



ABOUT TOURISM WESTERN AUSTRALIA

The Western Australian Tourism Commission, trading as Tourism Western Australia (Tourism WA), is the Western Australian Government (WA Government) statutory authority established under the Western Australian Tourism Commission Act 1983 (the Act) to facilitate the development and marketing of tourism in Western Australia. Located within the Department of Jobs, Tourism, Science and Innovation (JTSI), the agency sits under the portfolio of the Minister for Tourism, the Hon. Rita Saffioti MLA, and is governed by a Board of Commissioners.

Tourism WA's role is primarily as an economic development agency focusing on facilitating the development and promotion of Western Australia as a holiday, event, and convention destination. These functions are achieved by: marketing the state as a competitive destination; developing, attracting and marketing major events; supporting improvements in access and industry capacity; and the development of tourism experience and infrastructure. These activities promote positive outcomes for West Australians through increased connectivity, jobs, and vibrancy.



ABOUT THIS CORPORATE PLAN

Tourism WA has statutory requirements to produce a Corporate Plan and an Operational Plan to provide an overview of its strategic direction and operation for the coming financial year (2024-25).

The Corporate Plan takes a holistic approach to development of the state's visitor economy through a focus on activities that will encourage economic growth and job creation and aligning initiatives with other WA Government programs and developments to maximise the impact on visitor economy. The plan also includes an assessment of the outlook for tourism for the next four years.

PURPOSE

To support the growth of the Western Australian visitor economy under the Diversify WA framework and implement the initiatives outlined in the 10-year strategy (WAVES 2033).



OPERATING CONTEXT

FINANCIAL AND ECONOMIC RESPONSIBILITY

Tourism WA works with the WA Government on its vision for a strong and diversified economy delivering secure and quality jobs.

This alignment clearly articulates the relationship between the functions and responsibilities of Tourism WA and its Corporate Plan, as well as overarching Government goals. The desired outcome recognises that the value of tourism is more than economic, and the agency is charged with ensuring the tourism industry is competitive and sustainable over the long-term.

GOVERNMENT PARTNERSHIP FOCUS

Tourism WA works with key government partners to develop policy and support the delivery of key infrastructure projects creating a favourable environment for tourism investment. In February 2024, TICC was established to provide a more attractive and streamlined environment for development opportunities in Western Australia by addressing approval processes through agency collaboration. Tourism WA will also work closely with other WA Government agencies to provide guidance, identify land for development, collaborate on attraction and experience creation, hosting events and securing aviation routes.

Tourism WA works with all levels of government to develop a shared understanding of expectations, ensure the most positive outcomes for tourism, and contribute to the state's overall economic development and diversification.

WAVES 2033 formalises this partnership approach with a whole-of-government focus on initiatives under the 10-year strategy. Tourism WA will monitor the outcomes and reporting on initiatives across government agencies through an action plan over three phases during the decade.

INDUSTRY PARTNERSHIP FOCUS

Tourism WA works in partnership with the tourism industry to achieve the goal of maximising the economic value of tourism in the state.

The agency funds and supports key delivery partners, including five Regional Tourism Organisations (RTOs), the Western Australian Visitor Centre, Business Events Perth (BE Perth), and the Western Australian Indigenous Tourism Operators Council (WAITOC). These industry bodies ensure potential visitors have the right information and access to quality tourism experiences to drive increased customer bookings.

Tourism WA undertakes cooperative marketing across key markets with trade distribution partners, such as airlines, wholesalers, retail travel chains, and online tourism retailers. This provides Tourism WA with greater reach to attract visitors and the ability to retail a wide range of tourism product.

The agency also supports tourism product capability, competitiveness, and sustainability through grants and service agreements with peak industry bodies such as Tourism Council WA (TCWA), the Australian Hotels Association (WA) (AHAWA) and the Australian Tourism Export Council (ATEC).

STRATEGIC CONTEXT

In February 2024, WAVES 2033 was published after Ministerial, Cabinet, and industry approval.

VISION

Western Australia is recognised as a world-class destination, immersing people in unique cultures, communities and environment.

THE TARGET OUTCOME

Grow the Western Australia visitor economy to \$25 billion by 2033.

GOAL AREAS

1. **Aviation** – Grow Western Australia’s position as the Western Gateway to Australia, and expand routes that connect our regions, making it easier for visitors to get here, and experience all of Western Australia.
2. **Accommodation and Attractions** – To make it easier to invest and build sustainable tourism infrastructure, attractions and experiences in Western Australia that encourage visitors to stay longer, disperse further, and spend more.
3. **Events** – To make Perth and Western Australia the fastest growing events destination in the South East Asia region.
4. **Aboriginal Tourism** – For Western Australia to be the premier state for Aboriginal tourism in Australia.
5. **Destination Brand** – Position Western Australia as the preferred destination for High Yield Travellers looking for unique and authentic experiences.
6. **High Performing Industry** – Lift the capabilities needed to deliver optimal services to visitors and exceed the expectations of worldly travellers.

PRINCIPLES

WAVES 2033 identifies four Guiding Principles to underpin the delivery, interaction, and decision making of the agency:



SUSTAINABLE



INCLUSIVE



COLLABORATIVE



INNOVATIVE

KEY ACTIVITIES

Aligned with the six goal areas in WAVES 2033 and the budget allocation, the agency is focussed on the following initiatives throughout 2024-25:

AVIATION

Airport Infrastructure: Advocate and influence upgrades to airport facilities to drive new routes and upscaled capacity, with an initial focus on airports receiving international and interstate visitors such as Busselton, Broome, and Perth.

Airline Route Development: Increase the number of direct routes into Western Australia from overseas and interstate through utilising the Aviation Recovery Fund and focussing on priority and emerging markets including China, India, and Continental Europe.

Aviation and Marketing Partnerships: Evaluate and evolve cooperative marketing partnerships with airlines and key distribution partners to drive bookings, promote routes and enhance distribution and marketing strategies to optimise return on investment.

Regional Visitation and Connectivity: Successful take-up of the Affordable Airfares Program, with the primary objective to reduce the cost of leisure travel connecting Perth to Australia's North West.

Aviation Connectivity: Monitor proposed or potential improvements in aviation connectivity to regional parts of Western Australia for the initiation of new flight routes and and/or increased frequency.

ACCOMMODATION AND ATTRACTIONS

Attract Private Sector Investment: Connect private sector investors with opportunities in the tourism sector and support the WA Government's TICC to fast track and progress significant tourism investment across the state.

Accommodation Development:

- Continue delivery of the NPTED program signature accommodation stream focussed on identifying opportunities for low impact accommodation developments in and around National Parks.
- Provision of insight studies to inform investors on the potential for new short-stay accommodation in priority tourism destinations.
- Dedicated investment focus at the WTTC Global Summit to highlight and elevate investment opportunities across the state.

Experiences in Protected Areas: Deliver year three of the NPTED program working with the private sector to grow the inventory of sustainable tourism experiences in and around National Parks and Protected Areas; and facilitating workshops focused on niche areas such as trails, station stays and regenerative tourism.

Attraction and Experience Development: Through the Tourism Attraction Feasibility initiative, progress investigative studies to inform future decision making related to the development of innovative and high-quality tourism experiences that attract high yield travellers.

Cruise Tourism: Progress initiatives in the WA Cruise Tourism Strategic Plan 2023-2033 with a focus on cruise line attraction and readiness of port destinations to welcome cruise ships.



EVENTS

Leisure, Sports and Cultural Events:

- Successfully deliver and secure further Australian-exclusive events across sports, entertainment, and culture to activate state event infrastructure, as well as drive an 'always-on' calendar of events.
- Successful delivery of 14 mass-participation events secured for the state through Tourism WA funding contribution, and to identify future hosting opportunities for international and national championships which involves the community.
- To implement the new Metro Events Fund to sponsor events in the Perth region to drive significant growth in awareness and attendance of small to medium events.

Business Events: Support the State Government to secure business events in line with its economic strategy and Tourism WA's Vision for Dream Events, to expand this segment of the visitor economy and support new infrastructure.



ABORIGINAL TOURISM

Successful delivery of the final year of actions for the Jina: WA Aboriginal Tourism Action Plan 2021-2025 (Jina Plan).

Implementation of a joint State/Commonwealth Strategic Indigenous Tourism Program which will see the development of two new Camping with Custodian campgrounds and base camp infrastructure on the Kimberley coastline.

Build on the success of the Jina Plan to set out the blueprint for an Aboriginal Tourism Action Plan post 2025, to continue development of Jina's successful elements including Camping with Custodians, workforce programs, and experience development through industry and government engagement with WAITOC support.

DESTINATION BRAND

Consumer Demand:

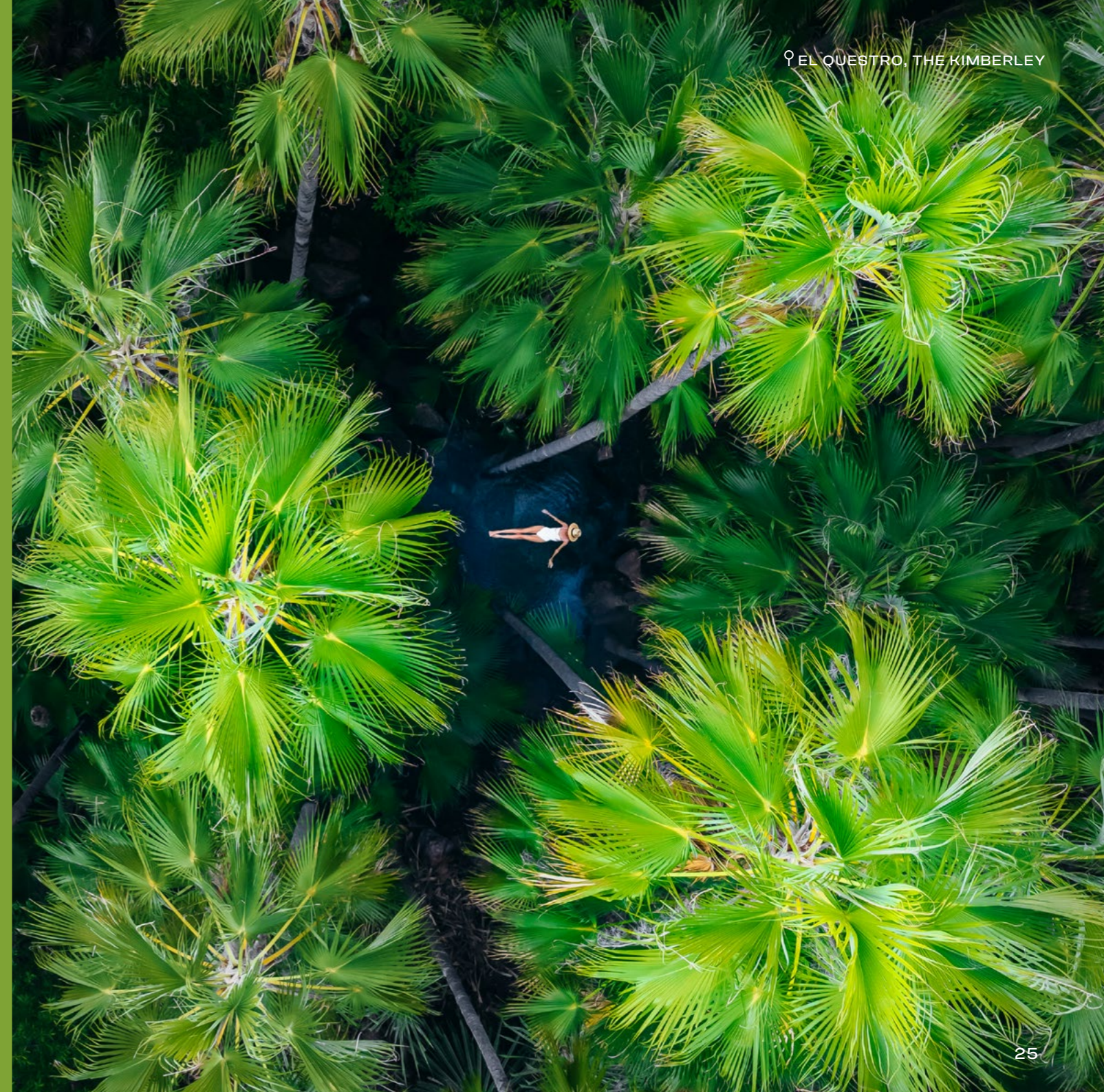
- Focus on 14 core international markets to govern activity and achieve objectives, and identify opportunities within emerging growth markets (such as Vietnam and South Korea), to engage with partners to promote WA and build awareness.
- Develop new creative Walking On A Dream brand assets to continue raising awareness, increase brand recognition, and drive conversion in both interstate and international markets.
- Build and expand supporting sub-campaigns (Road Trips, Working Holiday Makers, Aboriginal Tourism, Premium Experiences, Workforce) and event-specific campaigns (sporting, blockbuster and community) in line with the Vision for Dream Events, to integrate messaging and partnership activities to appeal to international markets and interstate.

Global Positioning: Focus on in-person connections and trade engagement via secured large-format inbound trade events for 2024-25 (WTTC Global Summit, Routes Asia 2025, Virtuoso Forum) and outbound trade missions with the State Government, including UK, Europe and South East Asia.

Brand Partnerships: Undertake successful cooperative marketing activity with key distribution partners in 14 identified core markets to achieve objectives and return on investment.

Advocacy and ambassador programs: Build on these programs to drive desire and consideration for Western Australia, maintain strong relationships with media and influential stakeholders, and engage with internationally recognised ambassadors.

Digital WA Experience: Leverage digital technologies and platforms to enhance Western Australia's global visibility and appeal to priority segments including launching a new corporate website, and an interactive app-based tool for visitors.



HIGH PERFORMING INDUSTRY

Value of the Visitor Economy: Educate agencies on the shared responsibility, opportunity and benefits of the visitor economy through an engagement framework.

Workforce Attraction and Retention: Continue workforce capacity initiatives under the new two-year Workforce Development Program to expand the quality, depth, and breadth of the workforce, to create a highly desired and skilled employment base. This includes in-school career promotion programs, and attraction and retention initiatives targeted at international students, and locals.

Sustainable and Inclusive Industry: Embrace and promote sustainable and regenerative practices for the Western Australian tourism industry through development of a sustainability plan with stakeholders, and by supporting accessible and sustainable tools and resources provided via the Tourism WA corporate website and through partners TCWA and WAITOC.

Inter-Governmental Policy: Work across State and Local Government to identify and optimise policies for visitor economy development, including support for the new TICC coordination and government action plan supporting WAVES 2033.

Innovative Technologies and Intelligence: Enhance accessibility and research and information with delivery of a new corporate website for industry, and an app-based tool for visitors, to deliver services to the industry and trade media.

Visitor Servicing: Progress with a revitalised WA Visitor Centre in the heart of Perth and raise the profile of Western Australia's leading tourism operators through the new Dream Collective industry recognition program.



MEDIUM TERM OUTLOOK

The travel industry has a robust future. Globally, economic conditions are positive, with expectations for global GDP growth to average approximately three per cent in 2024 and 2025¹. Whilst regional growth varies, travel demand has demonstrated a resilience to economic headwinds and cost pressures, with a general shift in consumer behaviour towards discretionary travel and experiences.

In the first three months of 2024, approximately 20 per cent more tourists travelled internationally than in the same period of 2023². Travellers are excited to explore past their regions' boundaries and with this as a base, overall prospects for short and long-haul travel are very positive.

Looking to Australia, Tourism Research Australia (TRA) forecasts exceptionally strong growth in international visitor spend with an annual average growth of 12 per cent until 2028. Domestic growth is expected to be more modest, with annual average overnight trip spend growth of approximately four per cent, and visitor nights to see approximately three per cent annual growth through to 2028.

Within this, the leisure/holiday sector is expected to have the greatest contribution to visitor nights over the medium-term, followed by business travel. In total, the expectation is that total visitor spend will be approximately 60 per cent higher than the pre-pandemic level by 2028, which demonstrates the opportunities across the industry³.

Western Australia is well positioned to capitalise on these conditions. Internationally, Western Australia is the natural 'Western Gateway' for visitors to Australia, as the largest capital city close to key source markets – including India, Indonesia and Continental Europe, and on the same time zone as China – and the only Australian city boasting direct aviation connections with the United Kingdom and Continental Europe (via London, Rome, and Paris respectively). The state's appeal and offerings are directly in line with the global trends for travel, with visitors seeking out authentic, immersive, cultural and premium experiences across all demographics.

Domestically, the Western Australian economy continues to lead Australia, underpinned by the strongest business investment in a decade and the highest rate of consumption in the nation, with elevated population growth and employment.

Western Australia has the highest GDP per capita/spending power in the country, fuelling ongoing leisure spend and high-end experiences, as well as creating positive conditions for tourism investment.

For the Western Australian visitor economy, the key focus now will be to capitalise and attract this demand by building a sustainable industry – accommodation, attractions and workforce – to encourage international and interstate visitors to stay longer and spend more, whilst continuing to entice West Australians to explore their home state and build on the interest and awareness created over the previous three years.

¹ OECD Economic Outlook, Volume 2024 Issue 1

² UN Tourism World Tourism Barometer accessed 5th June 2024

³ Tourism Forecasts for Australia 2023-2028, Tourism Research Australia, November 2023

CHALLENGES AND RISKS

For the Western Australian visitor economy, the high-level risks to the outlook are:

ECONOMIC CONDITIONS

A key challenge nationally is the effect on consumer and business confidence and spending going forward, as a result of longer-than-expected elevated interest rates and cost-of-living pressures. Evidence suggests consumers are prioritising travel ahead of other discretionary spending, but inevitably travellers will seek value for money trips and experiences.

WORKFORCE

Unemployment is likely to remain low in the short-term, putting pressure on tourism businesses to attract and retain staff. The return of international students and working holiday makers has supported the industry, but worker’s accommodation issues, especially in the regions, is still being addressed.

AIRLINE INDUSTRY

The cost of air travel is likely to remain elevated due to supply issues with aircraft and resourcing availability, increased costs and aviation fuel emissions. This has a flow-on effect for route extension and frequency.

NATURAL ENVIRONMENT AND SUSTAINABILITY

Natural disasters appear to be more prevalent globally, creating short to medium-term effects on destinations and their ability to accommodate visitors, whilst potentially impacting long-term desirability.

COMPETITION

The competition for visitors globally has never been stronger as traditional and emerging destinations are investing heavily in their visitor economies.

GLOBAL TENSIONS

Political unrest remains a factor in Europe and the Middle East, affecting consumer, industry, and investor confidence and exerting continued pressure on supply chain.

WAVES 2033 addresses many of the risks above, and the ongoing commitment to tourism by the WA Government will ensure that the tourism industry is strong and resilient in facing challenges ahead.

FINANCIAL CONTEXT

BUDGET 2024-25

Tourism WA's 2024-25 budget for its three core service areas is contained within the 2024-25 State Budget papers released in May 2024.

Service area	2024-25 Budget \$'000
Destination Marketing	72,753
Event Tourism	101,910
Tourism Destination Development	26,543
Total Cost of Services	201,206

GOVERNMENT COMMITMENTS

The 2024-25 State Budget outlined new and continuing initiatives over the four-year forward estimates period to 2027-28, to include:

- Increasing the Major Events Fund by an additional \$44.4 million to secure blockbuster events and drive visitation to the state;
- Investing \$500,000 to explore the feasibility of new tourism attractions and investing \$1 million to grow the state's cruise tourism program;
- Investing \$4.9 million to implement the Tourism Workforce Development Plan, building the capabilities needed to deliver optimal services to visitors and raising the profile of careers in tourism; and
- Creating a new \$3.6 million Metro Events Program to focus on creating iconic homegrown Western Australian events to activate the city and attract visitors.

These are in addition to the existing funds and programs, including the Aviation Recovery Fund, Affordable Airfares Program, Major Events Fund, Destination Marketing, the NPTED program, Aboriginal Tourism and support provided to industry partners including RTOs, TCWA, and BE Perth.

In 2024-25 Tourism WA will continue with the investment of the \$20 million Aboriginal Tourism Fund (2021 Western Australia Government Election Commitment) to make Western Australia the premier destination for Aboriginal Tourism. Other Election Commitments from 2021 in relation to Tourism WA are now complete.



KEY PERFORMANCE INDICATORS

	2022-23 ACTUAL	2023-24 TARGET	2023-24 ACTUAL	2024-25 TARGET
Total dollar amount spent by visitors in Western Australia ^(a)	\$14.0 billion	\$14.9 billion	\$17.7 billion	\$18.5 billion
Total overnight visitors to/ within Western Australia ^(a)	10.9 million	11.5 million	11.9 million	12.1 million
Western Australia's market share of international visitor spend in Australia ^(a)	8.3%	8.0%	8.2%	8.0%
Number of tourism filled jobs (direct and indirect) in Western Australia ^(b)	81,900	94,000	110,800	113,400
Percentage of visitors very likely to recommend visiting Western Australia ^(c)	86%	84%	78%	86%
Ratio of funds provided by the tourism industry to Tourism WA's investment in co-operative marketing	1.2 : 1	1 : 1	1.5 : 1	1 : 1
Ratio of direct economic return to Tourism WA's investment, for major events sponsored ^(d)	5.9 : 1	1.5 : 1	2.8 : 1	2.3 : 1
Ratio of Tourism WA's Total Cost of Services to total visitor spend in Western Australia	1 : 97	1 : 86	1 : 105	1 : 92

(a) 2023-24 Estimated Actual based on Year Ending December 2023.

(b) Reported with a one-year time lag due to timing of the release of the Australian National Accounts data. Historic results have been back-cast due to revisions to underlying data.

(c) Expressed as a rating of 9 or 10 out of 10, based on the rating of survey respondents.

(d) This is a new indicator that replaces 'direct economic impact of major events sponsorship'.

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