STATE GOVERNMENT STRATEGY FOR TOURISM IN WESTERN AUSTRALIA 2020

Detailed Strategy
Western Australia is one of the most extraordinary places on Earth.

From Australia’s whitest beach at Lucky Bay near Esperance on the south coast, to the amazing Bungle Bungle Range in the far north, and everything in between, Western Australia has something for everyone.

Visitors to Western Australia are guaranteed to experience something completely unique, such as the world’s only horizontal waterfalls in the Kimberley and the largest array of wildflowers on the planet.

Western Australia also boasts a diverse and exciting events calendar featuring world class events such as the Hopman Cup, V8 Supercars, Telstra Drug Aware Pro Margaret River, Perth International Arts Festival, Sculpture by the Sea and Perth International golf tournament.

We want to share these experiences with the world and to do this we need a sound tourism strategy.

The Government of Western Australia is committed to helping our vibrant tourism industry flourish by growing our domestic and international tourism markets, and I believe the whole of Government and industry working together under the State Government Strategy for Tourism in Western Australia 2020 will help us achieve this goal.

I congratulate Tourism Western Australia for developing this comprehensive strategy in consultation with the State’s tourism industry and other Government departments. I look forward to seeing it implemented and to seeing more visitors experiencing our extraordinary State.

Colin Barnett MLA
PREMIER
Message from the Hon Dr Kim Hames MLA, Deputy Premier; Minister for Tourism

I am pleased to present the *State Government Strategy for Tourism in Western Australia 2020*. 

This Strategy sets the direction for the Western Australian tourism industry over the next decade.

Western Australia’s economy is thriving and this has created many opportunities across the State. The growth of our resource and business sectors has brought more visitors to our shores and driven growth in our cities and regions.

The Western Australian Government wants to ensure that the tourism industry capitalises on these opportunities.

This Strategy looks at how we as a Government can work together with industry to make the most of the growth in business travel and international markets, as well as encourage further development and diversification in the regions.

The Strategy’s goal is to see the value of tourism in Western Australia double from $6 billion a year in 2010 to $12 billion a year by 2020.

The Government’s role is to create the right conditions so the tourism industry can flourish. To achieve this a whole-of-government approach is necessary because tourism is affected by many areas of Government responsibility and decision making, including planning, transport, regional development, conservation and environment.

The *State Government Strategy for Tourism in Western Australia 2020* provides that whole-of-government direction which will help expand our tourism sector over the next decade. It also outlines actions to help grow high yield markets and ensure visitors have the best possible experience while they are here.

The Strategy is a significant initiative that will shape the future of tourism in Western Australia and I would like to acknowledge everyone involved in its development. I look forward to working with industry during its implementation.

Dr Kim Hames MLA
DEPUTY PREMIER
MINISTER FOR TOURISM
1.0 A stretch goal for tourism in Western Australia

Tourism in Western Australia is a unique asset in a uniquely positioned State. Western Australia’s natural resources in oil and gas, metals and agriculture means that its share of the Australian economy (14.4%) is nearly 50% more than its share of the population (10%). It could be argued that WA is the most “international” of all States, accounting for 23.1% of all business investment into Australia and 42.4% of Australia’s merchandise exports.¹ WA’s economy is growing faster than any other in Australia. As a result of this forward momentum, the State’s population grew more than any other State in 2010, driven by both overseas and interstate migration. Against this backdrop of strong growth, tourism plays a number of key roles.

Tourism represents an opportunity to leverage this international focus and population growth into a multiplier effect for the economy, as well as diversifying the economic growth and supporting a large number of workers (currently 83,000 people)². Tourism is closely integrated with other key focus areas for the State, playing different and important roles in investment attraction, export development, strategic land development and regional growth. This shared importance has led the State Government to take a whole of government approach to developing the Tourism Strategy for Western Australia, recognising the different roles that government agencies will be taking to progress the strategy.

Across Australia, tourism is at a critical tipping point, with varied forces of change acting across global markets as well as impacting on domestic trends. In response to this, in 2010 Tourism Australia developed a vision document for the Australian tourism industry entitled 2020 Tourism Industry Potential. This was a comprehensively researched and reconciled forecast for the future value of the industry to 2020, and identified some of the growth drivers and barriers across international and domestic demand and supply. The national stretch target was a challenging one, aiming to double the value of tourism in Australia from $70 billion in 2010 to $140 billion by 2020.

In setting a stretch goal for tourism in WA, and with the key issues outlined in the following section in mind, several factors were considered:

- The goal for WA should align to the overall national direction.
- The goal should focus on the broader visitor economy, and not just leisure tourism. The visitor economy includes all short-term visitors who come to WA for business and education for example, as well as day trippers who support the local tourism and hospitality industries.
- While the challenges for tourism in WA are real and significant, so too are the opportunities. The goal needs to be ambitious.
  - It must act as a force for alignment across government agencies.
  - It must be a strong call to action for increased collaboration and alignment between government and industry, in order to address the issues and reap the benefits of the growth opportunities.
- The goal must necessitate step-change improvements in the way demand is stimulated and supply facilitated. A goal based on the current trajectory of visitation to WA will not be satisfactory, and will fall short of broader expectations.

¹ Source – Government of Western Australia, Department of State Development, Western Australia Economic Profile, July 2011
² Source – Tourism Research Australia; Tourism Satellite Account for Western Australia 20010-2011
1.1 The vision and goal for 2020

The overall vision statement for tourism in Western Australia is as follows:

Through partnership between private sector and government, the State’s tourism industry will achieve its full potential by delivering against the tourism brand promise – Experience Extraordinary Western Australia.

To bring this vision to life, the stretch goal for tourism in WA is:

To double the value of tourism in Western Australia – from $6 billion in 2010 to $12 billion by 2020.

This stretch goal assumes the WA share of the national tourism industry remains constant over time, and has been developed to suit the WA tourism environment (see Section 1.4). It should be noted that this target is a ‘direct spend’ target, including day trippers. Earlier articulations of this goal were stated in terms of Gross State Product (from $7 billion to $14 billion), but the change was made to ‘direct spend’ to make measuring the impact of the strategy more accurate. The magnitude of the stretch remains the same.

1.2 A partnership between government and industry is required

In order to achieve these outcomes, a partnership model that recognises the distinct roles of government and industry is critical. Both parties should understand, support and participate in the overall vision for tourism in Western Australia.

Tourism WA
Champions of the State Government Strategy for Tourism in Western Australia - 2020
Elements of the strategy owned and executed by Tourism WA to achieve the goal.

Government Agencies
Elements of the strategy to be incorporated into other Government agencies’ activities in order to achieve the goal.

Industry
Elements of the strategy that peak bodies and operators need to lead and participate in to achieve the goal.
The Government’s role

Lead agency: Tourism WA
Tourism WA is the State’s tourism strategy champion, and is responsible for the engagement and communication of the strategic direction to all stakeholders. Through consultation Tourism WA has identified potential areas of overlap and shared responsibility with other government agencies and with industry, and will have clearly defined leadership, participation and support roles as required on specific strategies or initiatives.

Tourism WA will continue to participate and align development with the national strategy, *Tourism 2020* (released December 2011), and work to influence and assist with favourable policy development.

Tourism WA owns the key tourism functions of:
- Marketing WA as a tourism destination.
- Sponsoring major international and home-grown events that attract visitation to and around WA.
- Facilitating major tourism infrastructure and investment.

Government agency partners
Government is responsible for creating a favourable environment for tourism infrastructure investment and development, through policy creation. In addition, the tourism strategy aims to integrate tourism objectives into government strategies and direction. This relies on Tourism WA and State and Local Government organisations working together on cross-agency initiatives – where each has clearly structured roles and responsibilities to achieve tourism outcomes.

Industry’s role
Success requires that the tourism industry in WA supports and participates in the overall tourism vision for the State. This can be achieved by:
- Delivering on the Experience Extraordinary brand promise through product development and service delivery.
- Integrating the Government’s tourism objectives into ongoing strategic, tactical and operational decisions and initiatives.
- Working in collaboration with government to represent the market perspective and feed into critical decisions.

This document details the specific areas where Tourism WA, other government agencies and industry can work individually and together to achieve the stretch goal for tourism in WA.

Each year the annual detailed operational planning process for government agencies will:
- Confirm the relevant areas of involvement.
- Develop a specific and measurable action plan for the next 12 months
- Set detailed KPIs linked to these actions.
- Use each agency’s respective governance structure to monitor progress against these KPIs.

While overall projections have been developed, it is expected that as the strategy evolves and implementation unfolds the shape of annual targets will also evolve.
1.3 Seven strategic pillars will assist in achieving the 2020 goal

To achieve this stretch goal, seven strategic pillars have been identified. These pillars have been determined by linking the critical issues explored in the next section and the current strategies of Tourism WA, other government agencies (State and Local) and the broader tourism industry.

The seven pillars required to achieve the 2020 stretch goal, covering both demand and supply-side issues, are shown graphically below, and detailed in the table overleaf. Supporting all pillars are the ongoing operational focus areas for Tourism WA, including a continued focus on WA’s established international markets, policy development and guidance, industry research and analysis, as well as continued communication with government and other stakeholders.

Figure 1 – Seven Strategic Pillars for Growth

<table>
<thead>
<tr>
<th>7 Strategic Pillars for Growth</th>
<th>Brand</th>
<th>Indigenous Tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure</td>
<td>Firmly establish the Experience Extraordinary brand</td>
<td>Provide every visitor the opportunity to have an Aboriginal tourism experience</td>
</tr>
<tr>
<td>Ongoing Operations</td>
<td>Asia</td>
<td>Grow WA’s share of high-yield Asian Markets</td>
</tr>
<tr>
<td>Regional Travel</td>
<td>Events</td>
<td>Position WA as a recognised events destination for locals and visitors</td>
</tr>
</tbody>
</table>

Business Travel
- Increase the contribution from Business Travel
<table>
<thead>
<tr>
<th>Strategic Pillars</th>
<th>Outcomes by 2020…</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Brand</strong></td>
<td>Firmly establish the Experience Extraordinary brand</td>
<td>The Experience Extraordinary brand represents a significant opportunity to stimulate awareness and demand in key markets, and at the same time provide industry with a clear and aspirational benchmark for the delivery of high quality products and services. It also offers the opportunity for brand extension – Extraordinary Western Australia – which can be used across government to promote the State, and benefit the tourism industry at the same time.</td>
</tr>
<tr>
<td><strong>Infrastructure</strong></td>
<td>Expand hotel, aviation and workforce infrastructure to support the growth</td>
<td>Government and industry partnership is critical to address systemic shortfalls in hotels, aviation and transport, workforce development and other infrastructure areas.</td>
</tr>
<tr>
<td><strong>Business Travel</strong></td>
<td>Increase the contribution and leverage of business travel to WA</td>
<td>With the growth of WA’s economy, the business travel segment represents a major opportunity to drive growth in both international and domestic visitation – for business and leisure.</td>
</tr>
<tr>
<td><strong>Asian Markets</strong></td>
<td>Grow WA’s share of high-yield Asian markets</td>
<td>It is critical to focus on international growth markets. To ensure that WA grows its share, strategies must be in place to meet target market requirements in terms of the routes to get here, and the quality and relevance of the products, service and experience they receive once here.</td>
</tr>
<tr>
<td><strong>Events</strong></td>
<td>Position WA as a recognised events destination for locals and visitors</td>
<td>Events are a powerful yet currently underutilised asset to help energise intrastate and interstate demand, appeal to overseas markets and support the Experience Extraordinary brand promise.</td>
</tr>
<tr>
<td><strong>Regional Travel</strong></td>
<td>Increase visitors to regional WA</td>
<td>Many of the Extraordinary Experiences available in Western Australia are located in regional areas, as are many of the leisure based tourism businesses in the State. To enable visitors to enjoy these experiences and to support the regional tourism businesses, increasing visitors to regional areas is critical.</td>
</tr>
<tr>
<td><strong>Indigenous Tourism</strong></td>
<td>Provide every visitor with the opportunity to have an Aboriginal tourism experience</td>
<td>Extending the reach and impact of Aboriginal tourism experiences is an important element of differentiation in overseas markets and delivers on the Experience Extraordinary brand promise.</td>
</tr>
</tbody>
</table>
1.4 The strategic pillars support the achievement of the overall goal

To understand the likely phases of progress towards the stretch goal, detailed modelling from Access Economics on the potential economic impact of identified infrastructure projects has been used. These infrastructure projects have been identified by Tourism WA as the State Tourism Development Priorities (STDP), and include aviation and airport development, hotels and eco-resorts throughout the State and caravan, camping and cruise ship infrastructure.

Figure 2 illustrates that much of the impact from market development and branding strategies will only start to have an impact once the building blocks of infrastructure development are in place. Specifically, the chart below shows:

- The three growth horizons: Setting the Foundation, Gaining Momentum and Achieving the Potential
- The baseline growth, projected at current rates (Growth as Usual)
- The incremental uplift from the identified STDP infrastructure projects (Infrastructure Uplift)³
- The likely shape of additional growth from other strategies (Shaped Target)⁴
- The flatline growth projection, to get from $6 billion to $12 billion in 10 years (Aspirational Target)

Figure 3 – WA’s 2020 Potential Target ($m) vs Current Rate of Growth

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³ Source – Access Economics, Development of an Economic Assessment Model for Tourism Infrastructure Priorities, January 2011
⁴ Source – TWA Analysis. Assumptions: Infrastructure impacts take 4 years to hit full capacity. Other strategic impacts will only exceed the infrastructure impacts in the final 3 years
This overall projection shows the relationship between different phases of the strategy. However each year Tourism WA and key government agencies will be setting detailed operational targets to support this overall growth, based on what has been achieved to date and changing circumstances. These targets will be linked to the specific strategies that each agency agrees to undertake to achieve the tourism outcomes, as outlined in Section 3.1.

Each of the seven strategic pillars will have a different impact on the four major market segments for Western Australia - International, Interstate, Intrastate and Day Trippers.

The pillars have been reconciled against the national 2020 Potential projections for international and domestic spend, to ensure that they align correctly with the growth projections from each segment. As an example, Figure 4 shows that all seven strategies are weighted to impact on the international market, which is where the highest growth must come from, in order to achieve the stretch goal.

Figure 4 – Breakup of stretch target and impact of strategic focus areas by growth segment

1.5 Tourism WA’s operational activities continue as usual

The seven pillars highlight the “stretch” elements of the strategy necessary to achieve the overarching vision of doubling the value of tourism in WA by 2020. In support of these, Tourism WA will continue to undertake a range of operational activities critical to its role as lead agency.

Investment and Infrastructure

The restructure of Tourism WA in 2010 led to the development of a new service to replace Industry Development and Visitor Servicing: Tourism Investment and Infrastructure. This service now focuses on generating investment in Western Australia’s tourism assets and in facilitating the development of major tourism infrastructure in the State.

It should be noted that Tourism WA is not responsible for the infrastructure projects themselves, but for facilitating the developments to ensure tourism outcomes are achieved.

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5 Source – Tourism WA analysis of Tourism Australia’s national 2020 Tourism Industry Potential
for the State. Example projects include facilitating the upgrade of the Busselton Airport to enable interstate visitation directly into the South West of WA and gaining commitment by Government to include a luxury hotel in the iconic Perth Waterfront development to enhance the visitor accommodation offering in the CBD. Tourism WA does not get involved in specific tourism product development as this is the responsibility of industry.

**Focus on existing markets**

Although strengthening WA’s position in high-growth Asian markets will be a focus of the strategy, this does not mean that the importance of existing markets diminishes. The diagram below illustrates the different market segments that Tourism WA will continue to focus on, including the high-growth Asian markets. The strategies for each differ depending on the market, ranging from protecting WA’s mature, highly valuable markets like UK and New Zealand, through to monitoring emerging markets like India.

**Figure 5 – Market segments by strategy**

<table>
<thead>
<tr>
<th>Maximise Potential</th>
<th>Protect our Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>Domestic</td>
</tr>
<tr>
<td>Singapore</td>
<td>UK</td>
</tr>
<tr>
<td>Malaysia</td>
<td>Germany</td>
</tr>
<tr>
<td></td>
<td>New Zealand</td>
</tr>
<tr>
<td></td>
<td>USA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Targeted Investment</th>
<th>Monitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>India</td>
</tr>
<tr>
<td>Indonesia</td>
<td></td>
</tr>
<tr>
<td>Korea</td>
<td></td>
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</tbody>
</table>

**Research to support strategies**

The research function within Tourism WA will continue to fulfil several key roles:

- Consolidating and synthesising research from national and international tourism research agencies for use in strategy development and communication with industry
- Tracking the Experience Extraordinary brand health
- Custom research into existing and new markets and market segments
- Making research and analysis available to industry and key stakeholders
- Measuring the progress of the strategies.
2.0 Background to the strategy - The state of tourism in WA and Australia

In setting the vision for tourism in Western Australia it is critical that there is strong alignment to the national direction, as well as addressing WA’s own set of key issues. While in general the picture for WA mirrors the current situation for tourism Australia-wide, there are several unique challenges and trends for WA that must be considered in the development of the strategic plan.

Rather than reinvent the wheel, WA’s picture of the future has built on the national analysis (in particular the Access Economics report - The 2020 Tourism Industry Stretch Goal: Implications and Imperatives), ensuring that the end strategies align closely to the national direction for the tourism industry. The remainder of this section explores the issues that both shape Western Australia’s tourism vision and highlight the pathway to achieve it.

2.1 International markets will become increasingly important

International markets will be the growth engines of the tourism industry in Australia over the next decade. In 2011 international tourism contributed 33% of overnight visitor spend nationally and this is forecast to grow to 45% by 2020\(^6\).

In contrast to the national picture, WA is extremely reliant on domestic tourism, with only an 11%\(^7\) share of Australia’s international tourism spend. In order to take advantage of the growth that will come from international markets, WA will need to increase its share of international visitors to Australia compared to other States.

2.2 High-yield Asian markets will drive much of the international growth

A detailed analysis of the drivers of international growth highlights a major trend – the dominance of China and other Asian markets as contributors to this growth. Figure 6 shows that nearly 30% of the total growth in tourism export dollars to 2020 will come from one country – China. Another 21% will come from the other Asian markets Tourism WA is also focused on – Indonesia, South Korea, India, Malaysia and Singapore. Western Australia must ensure that it is well positioned to meet the tourism needs of Chinese and other Asian visitors in order to gain in increased share of these growth markets.

\(^6\) Source: Access Economics on behalf of Department of Resources, Energy and Tourism; The 2020 tourism industry stretch goal: implications and imperatives (August 2010)

\(^7\) Source: Tourism Research Australia - International Visitor Survey (visitors aged 15+ years); Year End September 2011
2.3 Domestic tourism is in decline

A further complication of WA’s heavy reliance on domestic tourism (when compared to the national benchmark) is the current performance of this market. The table below illustrates the 5 year historical trends.

Figure 7 – Five year trends for WA, Spend and Visitation

<table>
<thead>
<tr>
<th></th>
<th>% Change Spend YE December 2011 v YE December 2006</th>
<th>% Change Visitors YE December 2011 v YE December 2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>WA All Visitors</td>
<td>7.5%</td>
<td>- 1.0%</td>
</tr>
<tr>
<td>WA Daytrips</td>
<td>13.5%</td>
<td>7.8%</td>
</tr>
<tr>
<td>WA Intrastate</td>
<td>- 5.1%</td>
<td>- 18.3%</td>
</tr>
<tr>
<td>WA Interstate</td>
<td>- 22.4%</td>
<td>- 20.9%</td>
</tr>
<tr>
<td>WA International</td>
<td>51.3%</td>
<td>18.3%</td>
</tr>
</tbody>
</table>

The downward intrastate trend has been exacerbated by an increase in outbound tourism – driven chiefly by the strength of the Australian dollar and the perceived value for money of overseas holidays.

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8 Source: Industry Potential and Strategic Aviation Development, Presentation from Tourism Australia
9 Source: Tourism WA analysis of the International and National Visitor Survey data from Tourism Research Australia
In parallel to the increased focus on international markets, it is critical to arrest this decline and re-energise intrastate and interstate visitation for WA. It should be noted that this challenge is not unique to WA, it is a national challenge but one that can and must be overcome to achieve the overall tourism industry potential for 2020.

2.4 Significant increases in tourism capacity are required

While the overall demand projections for WA and Australia are positive, to take advantage of this growth in demand will require significant uplift in supply capacity across a range of different areas. Detailed analysis illustrates the gap that needs to be bridged in order for WA to contribute sufficiently to the 2020 Potential stretch target of $140bn.

- Aviation
  - Tourism WA has projected that the international aviation capacity to WA has to increase by more than 50%, with also a corresponding increase of more than 20% in domestic capacity, between now and 2020 to achieve that goal.11

- Hotel rooms
  - Specific modelling has forecast that Perth will need an additional 1,900 hotel rooms by 2020 to keep occupancy at viable and sustainable levels from a demand and supply perspective12, far in excess of currently known investments.

- Workforce participation and productivity
  - Labour skills and productivity are critical supply side barriers to growth in tourism in WA, with strong competition from other industries for workers and a lack of consistent skills training. By 2020, WA will need an additional 9,600 workers in addition to current trends13.

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10 Sources: Australian Bureau of Statistics – Overseas Arrivals and Departures and Tourism Research Australia, National Visitor Survey, YE December 2011
11 Source –Tourism WA, Western Australia 5-Year Aviation Route Development Plan, June 2012
12 Source - AEC Consulting, Western Australian Government Hotel Incentives Stage Two, December 2011
13 Source – TWA Analysis (based on share of population extrapolation of national growth required), Access Economics, The 2020 tourism industry stretch goal: implications and imperatives, August 2010
3.0 Strategic Framework

The partnership model outlined in Section 1.2 is reflected in the structure of the strategic framework – achieving the outcomes requires government facilitation, enablement and strategy development combined with industry execution, alignment, participation and innovation.

The remainder of this section explores the elements of the strategic framework in more detail, looking at each of the pillars individually and highlighting the government and industry partners who will be involved in the execution of the strategies.

The strategic framework is summarised in Appendix 1, outlining:

* The key government strategies supporting each of the pillars
* The areas of industry alignment and participation
* The key metrics to be used to measure progress.

3.1 Managing the Framework

This document sets out an overall direction for tourism in WA, shared between government and industry. It is supported by seven strategic pillars that will guide the WA tourism industry towards achieving the 2020 goal of doubling the value of the industry to $12 billion. These pillars have been kept deliberately broad and aspirational to allow for evolution of each of the strategies and actions that sit underneath them. To ensure that this long-term direction is managed effectively and that momentum continues to build, a robust governance structure will support the overall strategy.

The framework is directional and not prescriptive

It is critical to note that this framework is not intended to be a detailed action plan. It is a directional framework outlining the key elements of achieving the vision, and some of the major strategies that sit under each element. Detailed strategy development and execution planning will take place on an annual basis across all of the different agencies and industry bodies involved in each of the pillars. In this way, while this overall framework and direction may not change markedly over the ten years, the detailed operational planning will change and evolve on an annual basis and across multiple government agencies and industry bodies.
Figure 9 – Governance Structure

THREE PHASES OF STRATEGY EVOLUTION

- Infrastructure Uplift
- Growth as Usual
- Shaped Target
The elements of the governance structure are explained in the table below:

<table>
<thead>
<tr>
<th>Element</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tourism WA</strong></td>
<td>As lead agency Tourism WA will be responsible for managing the overall strategy, stakeholder liaison and alignment, and progress reporting.</td>
</tr>
<tr>
<td><strong>Stakeholder Working Groups</strong></td>
<td>Where appropriate, working groups will be established to oversee the execution of the strategies and to ensure consistent alignment between different stakeholders. The make-up of each group will be dependent on the government agencies involved in the focus area and the relevant linkages with industry.</td>
</tr>
<tr>
<td><strong>Growth Horizons</strong></td>
<td>There are three different growth horizons to the strategy: Setting the Foundation, Gaining Momentum and Achieving the Potential. Each will have different key initiatives that need to be executed, and each will have an impact on the requirements of the next horizon.</td>
</tr>
<tr>
<td><strong>Key Initiatives</strong></td>
<td>For each growth horizon there will be several cornerstone initiatives that are critical to the success of the strategy and the achievement of the 2020 potential. The key initiatives for the first horizon are outlined in Section 4.8.</td>
</tr>
<tr>
<td><strong>Agency Operational Planning</strong></td>
<td>Each year elements of the strategy will be reflected in the operational plans for different government agencies. Tourism WA will maintain oversight of these different elements to ensure an overall alignment to the strategic pillars.</td>
</tr>
<tr>
<td><strong>Performance Reporting</strong></td>
<td>As the strategies evolve different KPIs will be set and measured. The progress against KPIs will be compiled annually and reported through each agency’s standard reporting cycles.</td>
</tr>
</tbody>
</table>

**Reporting on the Strategy**

Each year, the annual detailed operational planning process for Government agencies will:

- Confirm the relevant areas of involvement.
- Develop a specific and measurable action plan for the next 12 months
- Set detailed KPIs linked to these actions.
- Use each agency’s respective governance structure to monitor progress against these KPIs.

Accountability plans will be developed annually and will be updated on a regular basis. In addition, an annual update on the progress of the strategy will be published, starting in July 2013.
4.0 Strategies in more detail

4.1 Brand

The Experience Extraordinary brand strategy is relatively new and beginning to gain traction with key markets, and will require sustained focus to realise its full potential. In firmly establishing the brand it is critical that:

- It is fully integrated into Events planning and delivery.
- It becomes bigger than simply a tourism brand. Leveraged properly it can represent the entire State of Western Australia and become an asset for all government agencies and industries.
- It is fully embraced and supported by industry, including regional and local tourism organisations.
- Industry operators continue to innovate in product and service delivery to ensure the Extraordinary promise is met.

Firmly establish the Experience Extraordinary brand through....

<table>
<thead>
<tr>
<th>Government Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Unique creative and media strategies that differentiate WA in target markets</td>
<td>Bringing the brand to life through unique creative and innovative delivery channels (using clever combinations of traditional media and online and social channels) will help the WA brand promise to stand out amongst other destination brands in ways that are relevant and compelling to the target markets.</td>
</tr>
<tr>
<td>2. Experience Extraordinary leveraged into other, non-tourism areas</td>
<td>The Experience Extraordinary brand promise is bigger than simply a destination brand, it can encompass the identity of the State as a whole and as such can be used by other Government agencies and industry to communicate the benefits of the State when dealing interstate or overseas.</td>
</tr>
<tr>
<td>3. Infrastructure to deliver Experience Extraordinary.</td>
<td>Government must play a key role in facilitating and enabling the development of hotels and aviation, port and caravan/camping infrastructure, and ensuring that it is consistently aligned to the Experience Extraordinary brand promise.</td>
</tr>
<tr>
<td>4. Events that deliver Experience Extraordinary</td>
<td>Events can be one of the most potent and marketable tourism experiences, and are critical elements in delivering the Experience Extraordinary brand promise to key markets. By incorporating the Experience Extraordinary brand strategy into the Eventscorp operational strategy and event selection criteria, WA's event calendar will help to establish, embed and fortify the Experience Extraordinary brand for visitors and for the State of WA.</td>
</tr>
<tr>
<td>5. Sales conversion via cooperative marketing promotions</td>
<td>Tourism WA and industry must work together through cooperative marketing promotions to ensure that they are consistently aligned to the broader brand strategy of Experience Extraordinary.</td>
</tr>
</tbody>
</table>

GOVERNMENT INVOLVEMENT

- Department of Culture and the Arts
- Department of Environment and Conservation
- Department of Indigenous Affairs
- Department of Planning
- Department of the Premier and Cabinet
- Department of Regional Development and Lands
- Department of Sport and Recreation
- Department of Training and Workforce Development
- Department of Transport
- Landcorp
- Metropolitan Redevelopment Authority
- Small Business Development Corporation
- Western Australian Local Government Association
## Industry Strategies Overview

<table>
<thead>
<tr>
<th>Industry Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Individual product and service innovation aligned to brand promise</td>
<td>When individual operators take the Experience Extraordinary brand promise and make it their own and use it to guide product and service innovation, the brand will gain exponentially more momentum.</td>
</tr>
<tr>
<td>2. Tourism infrastructure to deliver Experience Extraordinary</td>
<td>Individual experiences are not enough to deliver Experience Extraordinary. Tourism infrastructure plays a critical role in supporting and enhancing the overall experience of each visitor, and must be continually developed to meet target markets’ expectations.</td>
</tr>
<tr>
<td>3. Events that align to the Experience Extraordinary brand</td>
<td>There is a significant opportunity for industry to embrace and enhance the Experience Extraordinary brand by considering it at the event concept and design stage, rather than seeking to overlay the brand at later stages in event development.</td>
</tr>
<tr>
<td>4. Extraordinary industry service and quality standards program</td>
<td>Experience Extraordinary is not only a consumer brand. It can be used as a call to action and aspirational benchmark to promote enhancement to existing service and product quality. This needs to be led by industry peak bodies and supported by operators, through such programs as “Service with a Smile” and the SBDC’s “Tourism BOOST”.</td>
</tr>
</tbody>
</table>

### INDUSTRY INVOLVEMENT

- Australian Hotels Association (WA)
- Australian Tourism Export Council
- Backpackers WA
- Caravan Industry Association WA
- Events Industry Association
- Perth Convention Bureau
- Regional Tourism Organisations
- Tourism Council WA
- Visitor Centre Association of WA
- Western Australian Indigenous Tourism Operators Council

## Measuring progress – Key Performance Indicators

Across the involved Government agencies, several key metrics can help measure progress and guide further evolution of the strategies and focus areas. In the case of Brand, these metrics are:

1. Brand awareness
2. Brand associations
3. Visitor expectations
4. Pride in WA

All of these metrics are currently tracked on an ongoing basis. Specific annual targets will be set each year through respective operational planning processes.
4.2 Infrastructure

The national 2020 Potential report and supporting analysis by Access Economics highlights that infrastructure development and activation are fundamental to achieving the 2020 targets. In WA this situation is even more critical, with a significant shortfall of hotel rooms in Perth (needing 1,900 new rooms by 2020), the need for new aviation routes to support growth aspirations and the workforce under pressure from higher growth sectors like resources. Without this infrastructure investment as an enabler, the strategies supporting each of the other outcomes will not have the required multiplier effect to achieve the stretch target.

Expand hotel, aviation and workforce infrastructure to support the growth through...

<table>
<thead>
<tr>
<th>Government Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOTELS</td>
<td></td>
</tr>
<tr>
<td>1. Policies that encourage investment</td>
<td>Government must work across agencies to develop a policy environment that increases the relative attractiveness of investment in hotels to address the room shortfall. A “whole of State” view must be taken to understand the downstream benefits of encouraging hotel investment.</td>
</tr>
<tr>
<td>2. Access to land and tenure for the development of tourism</td>
<td>The importance of tourism as a strategic land use must be communicated and understood across government agencies to ensure that tourism is properly represented in new development opportunities.</td>
</tr>
<tr>
<td>AVIATION AND TRANSPORT</td>
<td></td>
</tr>
<tr>
<td>1. New routes</td>
<td>Key to properly targeting the priority growth markets in Asia is to have established direct routes to key entry points in WA. Without this increase in aviation capacity, any market entry or demand stimulation activities will ultimately fall short.</td>
</tr>
<tr>
<td>2. Broome and SW airports expansion</td>
<td>As an extension of opening new routes, airport capacity must be expanded to provide more entry points and more direct access to different itineraries across the State for international, interstate and intrastate visitors.</td>
</tr>
<tr>
<td>3. Transport infrastructure</td>
<td>Transport infrastructure, especially in a State as large and diverse as WA, is critical to delivering the optimal visitor experience and to supporting extended itineraries for visitors.</td>
</tr>
<tr>
<td>WORKFORCE</td>
<td></td>
</tr>
<tr>
<td>1. Industry training and participation</td>
<td>Alongside infrastructure capacity, workforce productivity is the other key enabler for achieving the stretch goal for 2020. A cohesive, aligned partnership approach with industry is critical to continue to increase workforce participation and skills in alignment with target market needs. Initial analysis shows that another 9,600 tourism workers will be required by 2020.</td>
</tr>
<tr>
<td>2. Alignment of skills inflow through immigration</td>
<td>An ongoing relationship with the Department of Immigration will ensure that the skills requirements of the industry are properly reflected in skills inflows.</td>
</tr>
<tr>
<td>OTHER INFRASTRUCTURE</td>
<td></td>
</tr>
<tr>
<td>1. Destination management</td>
<td>By examining infrastructure requirements from a whole of destination perspective, Government agencies can better plan for infrastructure that supports a positive visitor experience at each destination.</td>
</tr>
<tr>
<td>2. Development of tourism precincts</td>
<td>Continued focus on the integration and development of our existing tourism precincts will help to deliver better visitor experience and optimise branding.</td>
</tr>
<tr>
<td>GOVERNMENT INVOLVEMENT</td>
<td></td>
</tr>
<tr>
<td>• Department of Culture and the Arts</td>
<td></td>
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<tr>
<td>• Department of Environment and Conservation</td>
<td></td>
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<tr>
<td>• Department of Indigenous Affairs</td>
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<tr>
<td>• Department of Planning</td>
<td></td>
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<tr>
<td>• Department of the Premier and Cabinet</td>
<td></td>
</tr>
<tr>
<td>• Department of Regional Development and Lands</td>
<td></td>
</tr>
<tr>
<td>• Department of Sport and Recreation</td>
<td></td>
</tr>
<tr>
<td>• Department of State Development</td>
<td></td>
</tr>
</tbody>
</table>
### Industry Strategies Overview

#### HOTELS

1. **Assisting government to guide investment attraction**
   - Industry operators have an unmatched perspective of market trends and future opportunities. By working together to incorporate this perspective, more accurate, relevant and aligned long term policy can be developed.

#### AVIATION AND TRANSPORT

1. **Capacity expansion**
   - Expanding the capacity of key airports across the state is one of the biggest enablers of the growth vision. It is imperative that asset owners and stakeholders continue to expand capacity to not only keep pace with growth, but open up new opportunities.

2. **Operational efficiency**
   - Increases in operational efficiency can increase the effective capacity of airports, supporting growth in intrastate, interstate and international visitation.

3. **Attractive pricing**
   - Competitive aviation pricing, in tandem with increased demand, will help to counter the outflow of WA tourists and increase the inflow of international and interstate visitation.

#### WORKFORCE

1. **Industry training and development initiatives**
   - The success of any government strategies to develop skills and increase workforce productivity will ultimately depend on the engagement and support of industry bodies and operators, and taking advantage of opportunities to work with government to shape the nature of these programs.

### INDUSTRY INVOLVEMENT

- Australian Hotels Association (WA)
- Australian Tourism Export Council
- Backpackers WA
- Caravan Industry Association WA
- Events Industry Association
- FutureNow: Creative and Leisure Industries Training Council
- Tourism Council WA
- Western Australian Indigenous Tourism Operators Council

### Measuring progress – Key Performance Indicators

There are several empirical measures that can provide strong indications regarding progress:

1. Airline capacity and load factors
2. Hotel capacity and occupancy rates
3. Tourism and hospitality workforce participation

All of these metrics are currently tracked on an ongoing basis. Specific annual targets will be set each year through respective operational planning processes.
4.3 Business Travel

As a State with strong economic prospects, the importance of business travel as a direct contributor to tourism growth cannot be underestimated, particularly considering that for many visitors from key growth markets this is likely to be the first introduction to the Experience Extraordinary brand.

<table>
<thead>
<tr>
<th>Increase the contribution and leverage of business travel to WA through…</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Government Strategies</strong></td>
<td><strong>Overview</strong></td>
</tr>
<tr>
<td>1. Events and experiences offered alongside conventions and conferences</td>
<td>Beyond the structure of conventions and conferences, an opportunity exists to work with industry to develop adjacent events and experiences that can better deliver on the Experience Extraordinary brand promise.</td>
</tr>
<tr>
<td>2. Growth in the convention / MICE segment</td>
<td>Aligned with increases in infrastructure capacity will come an increased competitiveness for the convention / meetings, incentives, conferences, and exhibitions (MICE) segment. By working with industry and corporates this segment can be developed further and awareness increased of WA as not only a business but also a holiday destination.</td>
</tr>
</tbody>
</table>
| 3. Leverage strategies designed to encourage business travellers to:  
  i. Bring a friend  
  ii. Stay longer  
  iii. Come back for a holiday | This must be a partnership focus with industry to develop leverage opportunities at both a State and operator level, and can provide a powerful growth multiplier to existing business travel patterns. |

**GOVERNMENT INVOLVEMENT**

- Department of Culture and the Arts
- Department of Planning
- Department of the Premier and Cabinet
- Department of Regional Development and Lands
- Department of Sport and Recreation
- Department of Transport
- LandCorp
- Metropolitan Redevelopment Authority

**Industry Strategies**

<table>
<thead>
<tr>
<th>Overview</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Education of business travellers about tourism experiences in WA</td>
<td>There are myriad tactical marketing and branding opportunities to introduce tourism experiences to the business traveller.</td>
</tr>
<tr>
<td>2. Extend conference offerings by packaging pre- and post-touring</td>
<td>Pre- and post-touring leverage strategies for existing conference visitation offer the double benefit of increasing yield as well as increasing the opportunities to experience WA as a leisure rather than business traveller.</td>
</tr>
<tr>
<td>3. Extend conference offerings by packaging support events</td>
<td>Aligning events to supplement existing conference offerings can increase the attractiveness and value proposition of the conference, and the viability of the events themselves.</td>
</tr>
</tbody>
</table>

**INDUSTRY INVOLVEMENT**

- Australian Hotels Association (WA)
- Australian Tourism Export Council
- Perth Convention Bureau
- Regional Tourism Organisations
- Tourism Council WA
Measuring progress – Key Performance Indicators

1. Value of business travel in WA
2. Repeat visitation

Both of these metrics are tracked through the National and International Visitor Surveys. Specific annual targets will be set each year through respective operational planning processes.
4.4 Asian Markets

The majority of tourism growth for Australia over the next 10 years will come from China, with other Asian markets also increasing in importance. It is critical that WA directly addresses this opportunity with a discrete set of strategies.

**Grow WA’s share of high-yield Asian markets through...**

<table>
<thead>
<tr>
<th>Government Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The high-yield FIT market, using traditional and non-traditional partners with premium brands</td>
<td>In targeting the Fully Independent Traveller (FIT) market we must play to WA’s strengths and utilise its wide range of premium brands and luxury experiences (e.g. seafood, pearls, wine, pink diamonds) to attract this high-yield market. By targeting those who have already visited Australia once, we also potentially reduce competition from dominant “first visit” tourism destinations such as Sydney, Great Barrier Reef and Uluru.</td>
</tr>
<tr>
<td>2. Growth of inbound tour operators</td>
<td>Inbound tour operators are critical agents of demand stimulation, and need to be a significant element of the strategic focus in order to support and enhance the target market brand positioning.</td>
</tr>
<tr>
<td>3. Events that appeal to target market preferences</td>
<td>Integrating target market insights with event development and selection will help to extend the brand impact, increase WA’s attractiveness as a destination and potentially help to grow average stay and yield per visitor.</td>
</tr>
<tr>
<td>4. Education and skills training to support growth in Asian visitation</td>
<td>The visitation and experience expectations of the Asian market are unique and require new workforce education and skills to properly meet them.</td>
</tr>
</tbody>
</table>

**GOVERNMENT INVOLVEMENT**

- Department of Culture and the Arts
- Department of Environment and Conservation
- Department of Planning
- Department of the Premier and Cabinet
- Department of Regional Development and Lands
- Department of Sport and Recreation
- Department of State Development
- Department of Training and Workforce Development
- Department of Transport
- Metropolitan Redevelopment Authority
- Small Business Development Corporation

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**Industry Strategies**

<table>
<thead>
<tr>
<th>Industry Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Asian market readiness – products and services that meet the needs of the market</td>
<td>By utilising target market insights, industry operators can ensure that they are developing products and services in alignment with the requirements of the Asian market.</td>
</tr>
<tr>
<td>2. Education market opportunities</td>
<td>These markets are currently being targeted for the purposes of attracting overseas students to Perth to study. There is potential overlap and opportunities to utilise the cultural knowledge of these students to increase the workforce skills base in WA.</td>
</tr>
</tbody>
</table>

**INDUSTRY PARTNERS**

- Australian Hotels Association (WA)
- Australian Tourism Export Council
- FutureNow: Creative and Leisure Industries Training Council
- Tourism Council WA
- Perth Convention Bureau
- Regional Tourism Associations
- Tourism Council WA
Measuring progress – Key Performance Indicators

There is both a lead and a lag indicator to measure progress against these objectives.

1. Visitation and direct spend from target markets
2. Length of stay.

Both of these metrics are tracked through the National and International Visitor Surveys and the International Brand Tracker. Specific annual targets will be set each year through respective operational planning processes.
4.5 Events

Events can be a powerful strategic asset to grow visitation:
- They provide a definite, time-based reason to visit a particular destination, which helps to break the inertia gap between intention to visit and actual visitation.
- They can showcase the Experience Extraordinary brand in highly involving and aspirational ways
- They can be equally attractive to intrastate, interstate and international visitors as well as local residents
- They can activate infrastructure and energise the local community which adds to the integrity of the experience

Position WA as a recognised events destination for locals and visitors through...

<table>
<thead>
<tr>
<th>Government Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A world-class annual calendar of events across WA, including 4-5 hallmark events</td>
<td>Hallmark events will serve to not only attract visitation but also to attract local support which in turn adds to the viability and atmosphere of each event. Having a number of hallmark events will also provide additional momentum to the remainder of the events calendar.</td>
</tr>
<tr>
<td>2. Key events infrastructure, including the major stadium, Perth Arena and other venues</td>
<td>Government must ensure that infrastructure strategies incorporate events as an integral audience source, and provide explicit capacity for visitors across a wide range of sporting and cultural events.</td>
</tr>
<tr>
<td>3. Simplifying major event zone processes on trading hours, liquor licenses etc.</td>
<td>Simplification will increase the number of different opportunities to properly brand an event as “Extraordinary” and ensure that the overall experience is in line with market expectations.</td>
</tr>
<tr>
<td>4. Promoting events to locals, visitors and potential visitors</td>
<td>An integrated marketing approach will be required to ensure that relevant events are communicated to target markets and can be factored into downstream product development and in-bound tour offerings.</td>
</tr>
</tbody>
</table>

GOVERNMENT INVOLVEMENT
- Department of Culture and the Arts
- Department of Environment and Conservation
- Department of Planning
- Department of the Premier and Cabinet
- Department of Racing, Gaming and Liquor
- Department of Regional Development and Lands
- Department of Sport and Recreation
- Department of Transport
- LandCorp
- Metropolitan Redevelopment Authority
- Regional Development Commissions
- Western Australian Local Government Association
<table>
<thead>
<tr>
<th>Industry Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Events supported in partnership with government</td>
<td>There are significant opportunities for industry and government partnerships in events, from event development through to sponsorship. These partnerships ensure outcomes that are consistently aligned with the overall strategy.</td>
</tr>
<tr>
<td>2. Innovative event development</td>
<td>Industry must continue to develop compelling, viable and innovative events to enhance the attractiveness of the WA events calendar to target markets and the WA public.</td>
</tr>
<tr>
<td>3. Infrastructure investment to support events (hotels, venues etc)</td>
<td>With a world-class events calendar comes an increased need for world-class infrastructure. Industry, with support from government, must continue to seek opportunities to develop event support infrastructure.</td>
</tr>
<tr>
<td>4. Events leverage to drive visitation</td>
<td>Within existing events there are a range of leverage opportunities at both the strategic and tactical levels. Industry can work with government and other industry operators to identify and take advantage of these opportunities.</td>
</tr>
</tbody>
</table>

**INDUSTRY INVOLVEMENT**
- Australian Hotels Association (WA)
- Events Industry Association
- Regional Tourism Organisations
- Tourism Council WA

**Measuring progress – Key Performance Indicators**

The effectiveness of the Events strategies can be measured in two ways:
1. Economic impact of events
2. Brand association – WA as an events destination.

These metrics are currently tracked on an ongoing basis. Specific annual targets will be set each year through respective operational planning processes.
### 4.6 Regional Travel

In a State as large and diverse as WA, regional tourism represents a critical asset and its importance is recognised in the weighting of intrastate visitors relative to interstate or international. We need to continue to strengthen and develop regional tourism to fully deliver on the Experience Extraordinary brand promise and support the strategies of other objectives.

<table>
<thead>
<tr>
<th>Increase visitors to regional WA through…</th>
<th>Government Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tourism support infrastructure in regional WA</td>
<td>Government must work to facilitate and support others to develop increased levels of tourism support infrastructure in the regions.</td>
<td></td>
</tr>
<tr>
<td>2. Australia’s best regional events calendar</td>
<td>As mentioned in the previous section, events provide a compelling, time-specific reason to visit a particular destination. This can be most impactful at the regional level, where local support of events can be strongest and the brand tie-in to particular iconic experiences can be optimised.</td>
<td></td>
</tr>
<tr>
<td>3. Improved caravan, camping and self-drive experiences</td>
<td>Caravan, camping and self-drive experiences can be a highly involving way to experience WA, but a more integrated approach is required to deliver on the “Extraordinary” brand promise.</td>
<td></td>
</tr>
<tr>
<td>4. Extraordinary regional experiences, including nature-based, culinary and cruise shipping</td>
<td>Much of the validation of WA’s Experience Extraordinary brand position can be found in regional WA. It is critical to continue to identify and promote these extraordinary experiences to add momentum to the brand strategy.</td>
<td></td>
</tr>
</tbody>
</table>

**GOVERNMENT INVOLVEMENT**

- Department of Culture and the Arts
- Department of Environment and Conservation
- Department of Indigenous Affairs
- Department of Planning
- Department of the Premier and Cabinet
- Department of Regional Development and Lands
- Department of Sport and Recreation
- Department of Training and Workforce Development
- Department of Transport
- LandCorp
- Regional Development Commissions
- Small Business Development Corporation
- Western Australian Local Government Association
Industry Strategies | Overview
--- | ---
1. Innovative regional events | WA currently has a strong representation of regional events. It is critical that industry continue to innovate and look to develop viable, sustainable regional events that align to the overall strategy for tourism in WA.
2. Improved caravan and camping experiences through product and service uplift | With a renewed focus on caravan, camping and self-drive holidays there is a clear call for industry operators to look for ways to continue to improve their product and service offerings.
3. Tactical promotion to support the Extraordinary regional experiences | The real cut-through of the Experience Extraordinary brand messages will come when the tactical, operator level promotions are aligned to the overall strategic brand messages around different regional Extraordinary experiences.
4. The National Landscapes initiative | The National Landscapes program was inspired by the need to make Australia’s wealth of over 9,000 national parks, protected areas, and reserves “digestible” for domestic and international visitors. It seeks to differentiate Australia’s iconic natural and cultural destinations, and improve the delivery of quality visitor experiences throughout these areas and their surrounding regions. In WA the currently recognized National Landscapes are the Kimberley, Ningaloo-Shark Bay and the Great South West Edge.

**INDUSTRY INVOLVEMENT**
- Australian Hotels Association (WA)
- Australian Tourism Export Council
- Backpackers WA
- Caravan Industry Association of WA
- Regional Tourism Organisations
- Tourism Council WA
- Western Australian Indigenous Tourism Operators Council

**Measuring progress – Key Performance Indicators**

The effectiveness of the Regional Travel strategy can be determined in a two measures:
1. Visitation and spend in regional WA
2. Visitor expectations.

These metrics are currently tracked on an ongoing basis. Specific annual targets will be set each year through respective operational planning processes.
4.7 Indigenous

Aboriginal tourism experiences are highly sought after, with 66% of visitors (83% of international visitors) seeking to participate in these activities in Western Australia. The recently published Aboriginal Tourism Strategy from Tourism WA and WAITOC identifies the core elements of progressing against this overall goal.

<table>
<thead>
<tr>
<th>Provide every visitor with the opportunity to have an Aboriginal tourism experience through…</th>
<th>Government Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Creation of a compelling point of difference for Aboriginal tourism to attract international visitors and the integration of Aboriginal tourism product within wider domestic tourism, further reinforcing the Experience Extraordinary brand.</td>
<td>By integrating Aboriginal product and culture into events and activities it helps to overcome the perception that all Aboriginal product is similar, and helps to bring it to a much wider audience.</td>
<td></td>
</tr>
<tr>
<td>2. Facilitation and support opportunities for access to land and tenure for the development of tourism.</td>
<td>Without access to land and tenure it is impossible to continue to develop new product and encourage the growth of the Aboriginal tourism industry. Government can play a strong role in supporting and facilitating this.</td>
<td></td>
</tr>
<tr>
<td>3. Supporting industry in interfacing with government and maximising involvement in government tourism programs.</td>
<td>Assisting operators to access sources of funding, business development and marketing support and assisting with the formation of Aboriginal tourism networks at regional, state and national levels will aid in supporting and increasing industry participation.</td>
<td></td>
</tr>
<tr>
<td>4. Opportunities and pathways for Aboriginal employment in tourism and hospitality, including through traineeships and cadetships.</td>
<td>The importance of workforce participation and skills is possibly even more critical for Aboriginal tourism, where the workforce is critical to the integrity and quality of the product and the experience.</td>
<td></td>
</tr>
</tbody>
</table>

**GOVERNMENT INVOLVEMENT**

- Department of Culture and the Arts
- Department of Environment and Conservation
- Department of Indigenous Affairs
- Department of the Premier and Cabinet
- Department of Regional Development and Lands
- Department of Training and Workforce Development
- Regional Development Commissions
- Small Business Development Corporation
- Western Australian Local Government Association

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<table>
<thead>
<tr>
<th>Industry Strategies</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Working collaboratively with others to facilitate tourism development including joint venture opportunities</td>
<td>Engagement through WAITOC, RTOs and Visitor Information Centres will assist in opening Aboriginal operators to more focused marketing and business development opportunities.</td>
</tr>
<tr>
<td>2. Supporting the development of viable and sustainable Aboriginal tourism businesses and supporting accreditation for Aboriginal tourism businesses.</td>
<td>Getting more Aboriginal tourism businesses export ready creates more opportunities for integration and participating in industry growth.</td>
</tr>
<tr>
<td>3. Developing a program of cross-cultural training and awareness opportunities for both employees and employers.</td>
<td>Encouraging cross-cultural training for both Aboriginal and non-Aboriginal people will help to improve mutual understanding of workplace and industry expectations and opportunities.</td>
</tr>
</tbody>
</table>

**INDUSTRY INVOLVEMENT**
- Australian Tourism Export Council
- Backpackers WA
- Caravan Industry Association of WA
- FutureNow: Creative and Leisure Industries Training Council
- Regional Tourism Organisations
- Tourism Council WA
- Western Australian Indigenous Tourism Operators Council

**Measuring progress – Key Performance Indicators**

The effectiveness of the Indigenous strategies will have a single measure:
1. Participation in Aboriginal tourism experiences.

This metric is currently tracked annually. Specific annual targets will be set each year through respective operational planning processes.
4.8 Cornerstone Initiatives – Setting the Foundation

As highlighted in Section 3.1, there are several major initiatives and strategies either underway or to be undertaken in the Setting the Foundation growth horizon, spread across multiple government agencies and stakeholder groups. These are outlined in the table below:

<table>
<thead>
<tr>
<th>Major Initiatives and Strategies</th>
<th>Lead Agency</th>
<th>Strategic Pillar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aboriginal Tourism Strategy</td>
<td>Tourism WA / WAITOC</td>
<td>Indigenous</td>
</tr>
<tr>
<td>Caravan and Camping Strategy</td>
<td>Tourism WA</td>
<td>Regional Travel, Infrastructure</td>
</tr>
<tr>
<td>China Tourism Strategy</td>
<td>Tourism WA</td>
<td>Asian Markets</td>
</tr>
<tr>
<td>Cruise Strategy</td>
<td>Tourism WA</td>
<td>Regional Travel, Infrastructure</td>
</tr>
<tr>
<td>Events Strategy, including Regional Events</td>
<td>Tourism WA</td>
<td>Events, Regional Travel</td>
</tr>
<tr>
<td>Kimberly Science and Conservation Strategy (Tourism element)</td>
<td>Tourism WA / Department of Environment and Conservation</td>
<td>Regional Travel</td>
</tr>
<tr>
<td>Landbank</td>
<td>Tourism WA / LandCorp</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>Naturebank</td>
<td>Tourism WA / Department of Environment and Conservation</td>
<td>Regional Travel, Infrastructure</td>
</tr>
<tr>
<td>Busselton Airport</td>
<td>South West Development Commission</td>
<td>Infrastructure, Regional Travel</td>
</tr>
<tr>
<td>Perth Waterfront, Northbridge Link, Riverside</td>
<td>Metropolitan Redevelopment Authority</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>State Aviation Strategy</td>
<td>Department of Transport</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>State Planning Strategy and Regional Planning Strategies</td>
<td>Department of Planning</td>
<td>Infrastructure, Regional Travel</td>
</tr>
<tr>
<td>Supertowns and Pilbara Cities</td>
<td>Department of Regional Development and Lands</td>
<td>Regional Tourism, Infrastructure</td>
</tr>
<tr>
<td>Workforce Development Plan for the Creative and Leisure Industries</td>
<td>Department of Training and Workforce Development / FutureNow: Creative and Leisure Industries Training Council</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>OUTCOMES – by 2020</td>
<td>BRAND</td>
<td>INFRASTRUCTURE</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------</td>
<td>---------------</td>
</tr>
<tr>
<td><strong>VISION</strong></td>
<td>Firmly establish the Experience Extraordinary brand</td>
<td>Expand hotel, aviation and workforce infrastructure to support the growth</td>
</tr>
<tr>
<td>1. Unique creative and media strategies that differentiate WA in target markets</td>
<td>HOTELS</td>
<td>Expand hotel, aviation and workforce infrastructure to support the growth</td>
</tr>
<tr>
<td>2. Experience Extraordinary leveraged into other non-tourism areas</td>
<td>HOTELS</td>
<td>Expand hotel, aviation and workforce infrastructure to support the growth</td>
</tr>
<tr>
<td>3. Infrastructure to deliver Experience Extraordinary</td>
<td>HOTELS</td>
<td>Expand hotel, aviation and workforce infrastructure to support the growth</td>
</tr>
<tr>
<td>4. Events that deliver Experience Extraordinary</td>
<td>HOTELS</td>
<td>Expand hotel, aviation and workforce infrastructure to support the growth</td>
</tr>
<tr>
<td>5. Sales conversion via cooperative marketing promotions</td>
<td>HOTELS</td>
<td>Expand hotel, aviation and workforce infrastructure to support the growth</td>
</tr>
<tr>
<td>6. Brand Awareness</td>
<td>HOTELS</td>
<td>Expand hotel, aviation and workforce infrastructure to support the growth</td>
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<td>7. Brand Associations</td>
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<td>8. Visitor expectations</td>
<td>HOTELS</td>
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<td>9. Pride in WA</td>
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<tr>
<td><strong>GOAL</strong></td>
<td>by 2020 the value of tourism in WA will have doubled to $12 billion</td>
<td></td>
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</tbody>
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