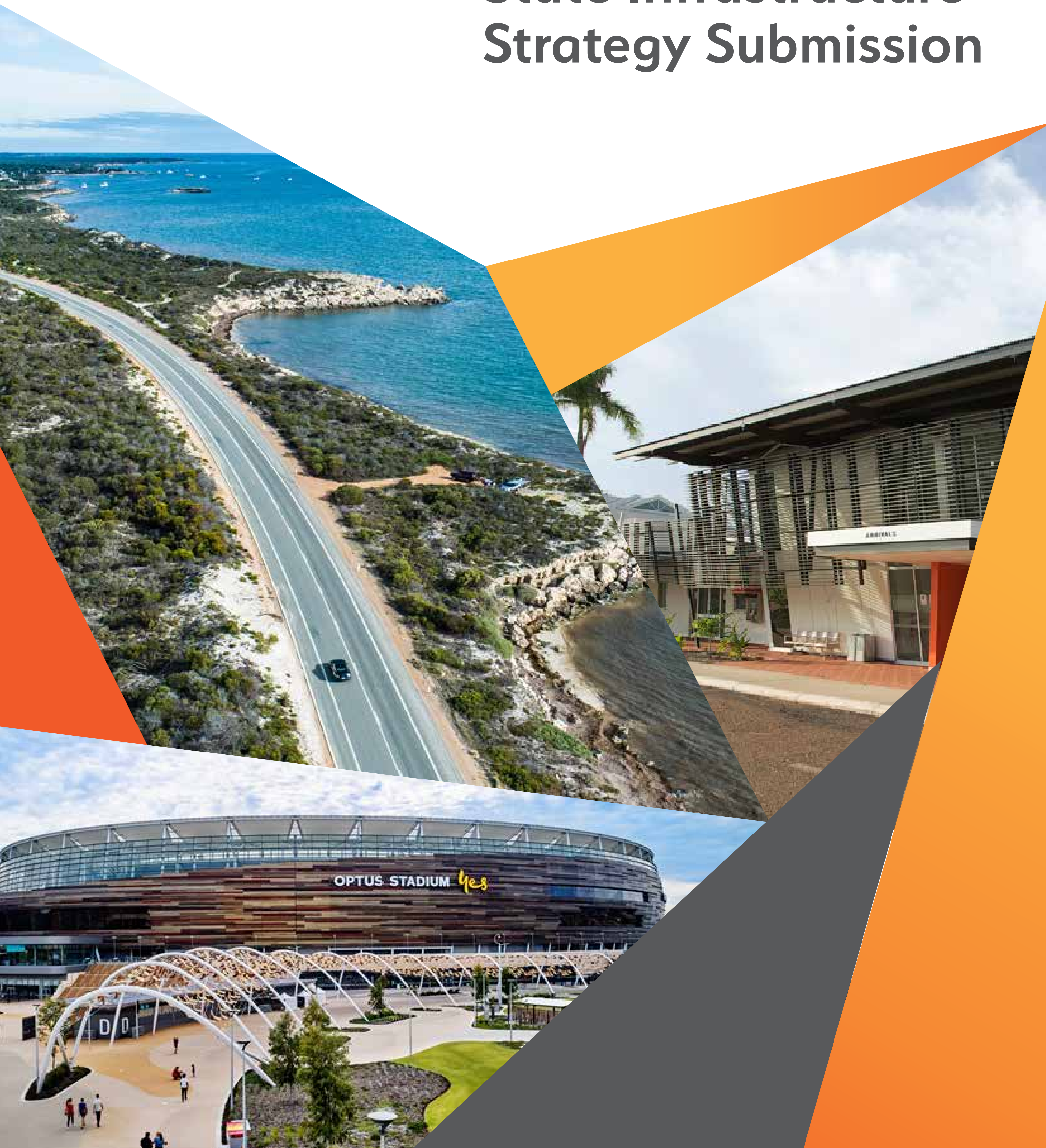
Tourism Council Western Australia

State Infrastructure Strategy Submission



Thank you for providing Tourism Council WA with the opportunity to comment on the State Infrastructure Strategy Discussion Paper. Tourism Council WA is the peak body representing tourism businesses, industries and regions in Western Australia. The Council promotes the value of tourism, facilitates sustainable tourism development and advocates industry policy on behalf of members.

This submission covers the following key areas:

Part 1
WA Tourism Infrastructure

Part 2
Critical Issues

Part 3
Policy Recommendations

Part 4
Priority Tourism Infrastructure Projects

Part 1

WA Tourism **Infrastructure**

1.1 The WA Tourism Economy

Tourism economic activity is generated by visitor spending while travelling to, and staying in, a destination away from their usual environment for leisure, business, education and other purposes.

Tourism is a significant industry in the WA economy, generating 100,900 total Full Time Equivalent jobs (direct and indirect) and creating $12.2 billion Gross State Product for the year 2018-19 . It also provides an important hedge and diversification from the resources and agricultural sectors.

Tourism economic activity differs significantly depending on the type of visitor. Visitor types are mainly differentiated by *purpose of visit* and by *source market*. The *purpose of visit*, in order of scale, are:

- Leisure (holiday makers and visiting friends or relatives)
- Business visitors
- Business events (delegates) and major events (attendees)
- Education (students)
- Other

The *source markets* are:

- Domestic - Daytrips (more than 40 kms from home)
- Domestic - Intrastate Overnight
- Domestic - Interstate
- International

Each of these visitor types differs significantly in their visitor expenditure, length of stay, time of stay, destinations visited and products consumed in Western Australia. Each of these visitors has a different distribution chain and infrastructure use.

Type	Infrastructure and Product
Attractions	Facilities that attract visitors by featuring events, exhibits, experiet nces entertainment or the environment e.g. stadium, national park, etc.
Access	Facilities that provide visitors with long distance and local transport services to and within a destination e.g. road, airport, jetty, etc.
Accommodation	Facilities to accommodate visitors or staff e.g. staff housing, camping grounds, serviced apartments, hotels, hospitality, etc.
Amenities	Facilities that underpin visitor services e.g. power, water, sewerage, toilets, car parking, digital network, signage, etc

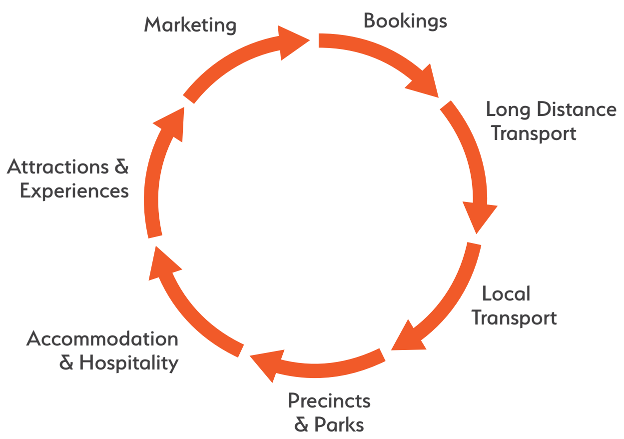
Tourism Research Australia, State Tourism Satellite Accounts, 2018-19

1.2 Tourism distribution chain and infrastructure

The distribution chain for tourism product works in two ways. Firstly, tourism product such as accommodation is distributed worldwide through online booking systems. These bookings can be made directly between consumer and tourism product or through intermediaries such as travel agents and inbound tour operators. This is known as the Global Distribution System and includes airlines, accommodation, vehicle rental, tours, attractions and experiences.

Secondly, the visitor journeys to the destination where they consume tourism product such as hospitality, retail, tours, attractions and experiences. Tourism distributes the customer to the product, rather than the product to the customer.

The role of tourism marketing is to brand and promote the attractions and experiences that journeys and destinations offer. This drives online bookings linking the tourism product to the visitor through the distribution chain.



Tourism product relies on different infrastructure throughout the distribution chain. For some infrastructure, such as airports and accommodation, tourism may be the primary use. For other infrastructure, such as roads and local amenities, tourism shares facilities with other users. Tourism often adds value to existing infrastructure primarily provided for residents.

Tourism product adds value to physical infrastructure by adding equipment, furniture & fittings, food & beverage, labour, creativity, performance, design and interpretation. This creates an experience which attracts and provides services to visitors.

Tourism infrastructure is the chain of infrastructure and facilities used by visitors along the visitor journey and at a local level to create a destination.

1.3 Value of WA Tourism Infrastructure

Infrastructure enables the development of tourism product such as events, exhibitions, guest services and attractions that **drive tourism demand**; and the transport, food services and accommodation that **supply visitors**. For example, a physical infrastructure venue is required to host an event that attracts visitors; and a road for tour operators to use for coach services.

Western Australian tourism product generates significant economic return from the infrastructure it operates from, as demonstrated below.

Tourism Product	Enabling Infrastructure	WA Direct Tourism Gross Value Added
Experiences and Events • Exhibits • Lookouts and trails • Rides and tours • Gambling services • Entertainment • Business events • Sporting events • Theatrical shows	• Museums, galleries and cultural facilities • National, zoological and botanical parks • Amusement and theme parks • Casino, racetracks and gaming facilities • Convention, exhibition and meeting spaces • Stadia and sporting venues • Theatres and entertainment venues	$940 million
Education and Training	• Education facilities (e.g. campus)	$463 million
Accommodation • Hotels, motels, hostels, resorts • Caravan parks • Serviced or private apartments • Student housing • Staff housing	• Accommodation property (room stock) • Precincts and foreshores	$975 million
Retail and Hospitality • Shop/store operations • Restaurant/bar/cafe operations	• Retail and hospitality property • Precincts and foreshores	$1,437 million
Local Transport • Bus and taxi services • Urban rail services (e.g. Transperth) • Ferries and water taxis	• Bus ports • Roads • Railway • Jetties, wharves and marinas	$199 million
Long Distance Transport • International and domestic flight services • Trans-oceanic and coastal cruises • Rail services • Coach services • Vehicle rental, repairs and fuel sales	• Airports • Passenger shipping ports • Railway • Roads	$1,258 million
Other	• Miscellaneous infrastructure	$276 million

Source: Tourism Research Australia, State Tourism Satellite Account, 2018-19

1.4 Visitor Infrastructure Needs

When examining capacity and future demand to inform infrastructure planning and development all users need to be considered, including visitors. Visitors move in different patterns to non-visitors and use infrastructure in a distinctive way. For example, visitors are more likely to utilise public transport outside of peak work times than non-visitors.

It is therefore important to not only include visitor numbers in infrastructure planning but also their distinct patterns of behaviour. Without this, the cost benefit analysis undertaken will be understated or inaccurate as numbers and resultant economic and social impact are not inclusive of all users and their patterns of behaviour.

Example | Forrestfield-Airport Link: The new Forrestfield-Airport Link train line will be used by budget conscious out-of-state leisure travellers from the airport and across the rail network to the city and destinations such as Fremantle and Mandurah. There is likely to be an increase in the demand for accommodation and other core tourism infrastructure in suburbs along this train line such as Subiaco and West Leederville as visitors use these locations as their base when visiting Perth. Facilities planning in these locations needs to consider the increase in demand from these visitors for accurate capacity planning and the full economic and social impact.

Each visitor type has distinct behaviours which shape how they engage with local infrastructure. A summary of the key tourism infrastructure underpinning each product requirement is shown below.

Primary Purpose of Travel	Key Destination Infrastructure	Tourism Product
International student	• Student housing • Local transport (roads, railways, etc) • Education institution capacity	• Medium-term accommodation • Urban rail services, bus and taxi services • Education course/degree
Business event delegate	• Meeting capacity (hotel meeting rooms and convention space) • Accommodation room stock	• Business event • Hotels, apartments, motels, holiday homes and resorts
Major event attendee	• Stadia, sporting venues and recreational facilities • Hospitality property	• Event • Takeaway meals and restaurants
Business/Corporate visitor	• Accommodation room stock	• Hotels, apartments, motels, holiday homes and resorts
Leisure visitor (holiday maker and visiting friends or relatives)	• Attractions (e.g. national parks, museums, galleries, casino, etc) • Long-distance transport (e.g. airports, roads, railways, shipping ports)	• Exhibits, rides, recreation, tour operators, etc. • International and domestic services, rail services, coach services, etc.

Figure 3: Tourism Infrastructure by Visitor Type.

1.5. Public and Private Tourism Infrastructure and Product

Visitors use tourism product which requires tourism infrastructure. Tourism product is usually privately operated but often relies on public infrastructure. There are a number of public and private ownership-operator models for tourism infrastructure and product.

Tourism product often adds value to land, assets and infrastructure owned and operated by the public sector. These private tourism products operate through leases, licences, concessions and other permits to use the public infrastructure.

The public infrastructure is typically owned and operated for multiple policy objectives in addition to tourism. The public ownership or operation of infrastructure can significantly affect the capacity and competitiveness of tourism product.

While accommodation is typically privately owned and operated infrastructure, there are few tourism attractions, tours, events and experiences where the essential infrastructure is privately owned and operated.

Infrastructure Example	Infrastructure Owner	Infrastructure Operator	Tourism Product Operator
Road	Public	Public	Public – TransWA Private - Tours, buses and self-drive.
Perth Zoo	Public	Public	Public – Exhibits Private - Hospitality
Perth Stadium	Public	Private	Private – Event, attractions and tours
Rottnest Island	Public	Public	Public – Accommodation Private – Accommodation, tours, retail, etc
CBD Hotel	Private	Private	Private – hotels, motels, etc

1.6. Prioritising WA Tourism Infrastructure Needs

With limited resources to invest, it is critical to select infrastructure of the highest economic, social and environment returns. Tourism Council WA conducted a survey of public and private tourism operators to assess tourism infrastructure need.

Respondents prioritised the types of infrastructure needed as:

1. Attractions
2. Transport
3. Precincts and Amenities
4. Accommodation

The highest priority identified across the industry and across destinations was for attractions. There has been significant underinvestment in private attractions, primarily because they are not approved by government land and infrastructure managers. Attractions are a high priority across all WA destinations, but particularly Perth where they are needed to attract visitors to the state and extend visitors' stay in CBD accommodation. Perth simply does not have enough things to do.

Transport infrastructure priorities vary significantly from destination to destination within Western Australia. Transport needs are primarily roads within and between major destinations.

Amenities and facilities significantly impact the visitor experience. These needs are typically small projects which vary considerably between destinations.

Accommodation was the lowest priority identified by the tourism industry. Until recently the private sector has been able to invest in capacity to meet demand, particularly with the recent development of Perth hotel accommodation. However, commercial accommodation development has now slowed significantly due to an unlevel playing field and supply uncertainty, arising through commercial short stay use of residential buildings via Airbnb.

The two most acute accommodation issues across destinations are the lack of regional resorts and the lack of regional staff housing. Unlike short stay apartments, resort style accommodation drives visitor demand as well as supplying visitor accommodation needs. These resorts require land with high natural value, which is typically crown land. This resort style accommodation investment struggles to pass through government approval processes.

Part 2
Critical Issues

There are four critical issues regarding tourism infrastructure that are highlighted as part of this submission:

2.1 Demand Peaks and Non-Peaks

Tourism experiences strong peaks and non-peaks in demand and visitation throughout the year. Peaks can be time of day, days of the week or weeks of the year. Peaks significantly differ depending on the destination, visitor type and product consumed.

Peaks are caused for multiple reasons:

- Natural seasonality e.g. wet and dry in northern WA, whale migration and wildflower season.
- Social fluctuations e.g. dining times, weekends, public holidays and school holiday.

There are significant infrastructure capacity constraints during peaks when demand spikes. When this occurs there are queues, congestion, environmental impacts and forgone visitor expenditure and economic benefit.

2.2 Natural Environment, Climate Change and Sustainability

Tourism is one of the few sustainable and renewable uses of the natural environment that adds real economic value. Western Australian tourism is highly reliant on the natural environment, particularly national parks and protected areas. Tourism is exposed to the impact of climate change on the natural environment and on consumer perceptions of the state as a destination.

There are a number of issues related to the environment:

- Consumption of transport services by tourism does result in carbon emissions, and this is compounded by the vast land mass of Western Australia.
- There is limited use of pricing or booking systems to manage demand or impact on protected areas. This results in a high volume, high impact, low return tourism model in environmentally sensitive areas.
- Visitor perception of Western Australia as a responsible destination.

Western Australian tourism is highly reliant on the natural environment

2.3 Public Land for Attractions

Attractions are essential components for any successful tourist destination. They provide something for visitors to do and can be the major driver of a decision to visit a location. There is a need for new attractions that offer a high value experience that patrons are willing to pay for to generate a return on infrastructure investment and development.

Attractions require locations of high natural, social or heritage value. Land with these values is typically crown land managed by government authorities ranging from Swan River Trust to National Parks and local government.

While often set aside for public use and enjoyment, there has been little private investment in new attractions and experiences on crown land. This is not due to a lack of visitor demand or private sector interest in investment. Nor is investment in attractions hampered by environmental or safety approvals. Private attractions are lacking due to public land managers not granting permission for the land use via a lease or licence.

Consequently there has been no new major attractions (over 50,000 patrons per annum) developed in Perth for more than 25 years. Most of Perth's existing attractions are also State Government owned and operated and there are few private sector attractions compared with other Australian destinations. There is also limited diversity in permitted visitor use across crown land .

There are several major hurdles to the creation of new attractions on public land:

- Nearby local residents and existing users of public land (NIMBYs) who oppose facilities which would attract more visitors to the public land and those who oppose private investment in public land as a matter of ideology.
- Public land managers whose jurisdiction, culture and governance model prioritises the interests of local residents and existing users, compared with the broader public interest of visitors to the local area and the economic and social value to Western Australia.
- The multiplicity of public land managers and government authorities with the power of veto over a proposed attraction and lack of a single authority in government to approve an attraction.

2.4 Journey and Destination Infrastructure Planning

Visitors journey from their source market through to destinations and onward to other destinations. Destinations are not defined by government boundaries but by visitor behaviour.

A destination comprises a main transport access point, accommodation hub and attractions within a return day trip to the accommodation. A significant challenge for tourism infrastructure planning and delivery in Western Australia is that our destinations are typically broader than our local government areas, unlike competing destinations such as the Gold Coast, Brisbane and Cairns in Queensland.

Infrastructure and facilities are typically evaluated, planned and delivered as stand-alone projects. This infrastructure planning and delivery is split across State Government Departments based on their specific remit such as transport, national parks, etc, and across Local Government Authorities in the destination.

For example, an additional attraction in a destination can trigger an additional overnight stay for a visitor. This additional overnight stay increases the return on investment for other infrastructure such as accommodation, airports and roads in the destination. The attraction could be a small facility such as a zipline on public land managed by a State Department. The accommodation that benefits could be in a separate LGA to the attraction.

For tourism, infrastructure is best planned and evaluated from the perspective of visitor journeys and destinations. A cluster of small projects and facilities across a range of Departmental portfolios and LGAs in a destination will often have a more significant impact than a single major project. These clusters are best identified by the tourism industry and destination marketing bodies which best understand visitor journey and destination behaviour.

By comparison with other destinations, Perth has a limited number of non-government attractions operated by non-profit or private sector organisations. Attractions which are operated by private sector organisations are dedicated to providing experiences which attract patrons. They do not require taxpayer funding to start, develop or market their experiences to the world. For example, Fremantle Markets attracts more than two million visitors each year and is a private sector attraction.

Part 3

Policy Recommendations

Tourism Council WA recommends the following policy reforms for consideration and inclusion in the State Infrastructure Strategy.

3.1 Addressing peaks and non-peak periods

Rather than simply building infrastructure to meet peak tourism demand, policy reforms can address issues arising from peaks and troughs in tourism.

Booking Systems for Public Tourism Infrastructure

Online booking systems are an effective demand management tool when capacity is limited in peak periods. Booking systems are most effective when coupled with pricing. However even if visitor use is booked but not priced, booking systems can prevent onsite congestion, queues and poor visitor experience. Booking systems curtail demand when physical or environmental capacity is reached and visitor use can no longer be reserved. This enables the visitor to select non-peak periods when capacity is available.

Bookable tourism facilities and product attracts visitors to a destination because it provides the visitor with confidence before they travel that they will be able to use the facility. Bookable product also makes marketing more effective by converting destination appeal into a booking. Bookable product can also be included in travel packages.

Booking systems are widely used by tourism operators but are often not used for public assets which are not priced. State Government could investigate the use of booking systems for all public tourism infrastructure. This could include bookings of campsites, parking bays and other visitor use.

Dynamic Pricing for Public Infrastructure

Together with online booking systems, dynamic pricing (also referred to as surge or demand pricing) allows for flexible prices set by current market demands. Dynamic pricing is used by the private sector to mitigate fluctuations in tourism demand. For example, airlines and accommodation utilise the Global Distribution System (GDS) where pricing changes every 30 minutes based on bookings and online search behaviour.

Visitor use of public sector tourism facilities are often not charged, or are charged at a fixed rate. This means dynamic pricing cannot be used to increase demand in non-peak periods with discounted fees, nor prevent congestion or queues in peak periods with premium pricing.

Fixed user charges per guest are sometimes levied on tourism operators, for example National Park entry fees and Rottnest Island landing fees. These fixed charges also become a dead weight on the operator's ability to use dynamic pricing to manage demand.

Pricing public tourism facilities would also generate revenue streams to fund infrastructure to meet demand during peaks and revenue to fund marketing to raise demand in non-peak periods. Pricing can also signal the value of the tourism experience and increase demand and yield. Pricing for public tourism infrastructure can also be varied to meet social objectives, such as free or discounted use for school groups during non-peak periods.

Dynamic pricing could be introduced for public tourism infrastructure by:

- User charges levied on tourism operators should be a percentage or flexible charge, rather than a fixed rate, to enable dynamic pricing by the tourism operator.
- Pricing such as entry fees or parking charges should be introduced when public tourism assets are first developed or undergo a major upgrade.
- State Government should invest in digital technology to enable dynamic pricing. For example campsite booking systems for National Parks.
- Highway tolls be introduced on State Route 2 (Kwinana Freeway/Forrest Highway) that charges a higher rate on a Friday night ahead of a long weekend to alleviate the traffic congestion as holiday makers move south.
- State Government agencies could actively promote discounted prices to drive demand in non-peak periods and build community acceptance of pricing.

Staggering School Holidays

Western Australia's most extreme tourism peak is during to school holidays when a large portion of the population in Perth seeks to travel at the same time to regional destinations which do not have the capacity to accommodate and serve them. This peak creates congestion, increased prices for visitors and a lower quality experience.

Accommodation occupancy in regional WA is typically about 50-60% per annum because visitors are turned away during school holidays when occupancy is at 100%, but intrastate visitor demand then sharply declines outside school holidays and occupancy drops. Private tourism operators market to out-of-state visitors to lift demand outside of school holidays and use dynamic pricing to manage intrastate demand as occupancy rises and falls.

Western Australians often express a view that WA is an expensive holiday destination but that is largely because they are looking at prices during peak periods when Western Australians wish to travel at the same time.

Staggering a two week school holiday by school districts across a four week period would effectively halve congestion. By spreading demand more visitors could be accommodated, prices would reduce and the visitor experience would improve.

Employers and workers would also benefit with the parental workforce being able to stagger leave rather than all requesting for the same two-week period.

Staggering school holidays is practised in other countries such as Germany, France and the Netherlands. It should be a particular consideration for Western Australia compared with other States, due to the significant population imbalance between Perth and regional destinations.

Managing Residential, Staff and Visitor Accommodation Supply

The lack of regional staff housing, particularly for peak tourism periods has become more extreme due to Airbnb. Regional Airbnb properties built and approved for residential use move into the short stay market to realise higher returns during peak periods. Airbnb does not lead to building additional room stock or capacity, rather the supply of short stay accommodation is increased but the supply of residential accommodation is simultaneously reduced as owners switch markets for existing rooms.

This process is intensifying tourism peaks as more visitors come to regional towns during peak periods but displace residents and workers at the same time through reduced residential rental properties. Local infrastructure comes under strain as amenities were developed for residents rather than visitors during peak periods. The process is referred to as 'over tourism' and results in higher prices and poorer experiences for visitors and residents alike.

The recent Parliamentary Inquiry into Short Stay Accommodation made recommendations for a registration system that would enable local authorities to better manage the impact of Airbnb. Implementing these recommendations would assist to minimise 'over tourism', address staff housing shortages and provide confidence for private sector investment in additional commercial accommodation.

3.2 Unlocking public land for tourism attractions

Fundamentally the system is not working to enable investment in new, diverse and sustainable attractions on crown land. Policy reform can enable the development of this critical tourism infrastructure need.

Transition to a single Parks WA agency

Currently WA public land reserved for visitor use and enjoyment is managed by separate management authorities including Rottnest Island, Perth Zoo, Kings Park, Swan River Park, Whiteman Park and National Parks. The narrow remit of these authorities tends to create a focus on local residents and existing users rather than the broader public interest of potential visitors from across WA.

Management of parks and visitor precincts could be combined in a single agency such as Parks Victoria. A single agency could better plan and deliver public and private sector attractions across the State.

Establish a Tourism Events and Activation Act

A Tourism Events and Activation Act would enable the State Government to identify a tourism event or attraction as a state significant project and appoint a single approval authority for the project (such as the Planning Minister).

Projects would still be subject to separate environmental and safety approvals. However, these projects would have a single land use approval authority, rather than be subject to veto by any one of a number of local or state government authorities. The single authority would apply a state-wide public interest test rather than a local interest test and would make a decision at arms-length from both local opposition groups and tourism development proponents.

The proposed WA Tourism Events and Activation Act has precedents in major events and planning legislation in Queensland, New South Wales and Victoria.

3.3 Evaluating Tourism Infrastructure

Tourism infrastructure projects are best assessed for their impact on the destination, rather than solely on their direct economic return. Small projects should be bundled from across Departmental portfolios and Local Government Areas and assessed for their cumulative impact on the destination.

Defining Destinations

Destinations are not defined by state borders or local government areas; destinations are defined by visitor choices, travel behaviour and tourism product use. While not a perfect system, the current structure of Tourism Regions and Sub Regions used by Tourism WA and the regional tourism organisations is the best available structure for assessing tourism destination infrastructure.

Transport infrastructure for visitor journeys to and within a destination is best assessed at the Tourism Region level. Attractions, amenities and accommodation are best assessed at the Sub Region level.

Tourism Region	Sub Region
Destination Perth Visitor Spend: $4,394M Overnight Visitors: 5.7M	Avon Valley Fremantle & Rottnest Mandurah, Peel & Rockingham Perth City Sunset Coast & Gingin Swan Valley & Perth Hills
Australia's South West Visitor Spend: $1,706M Overnight Visitors: 3.3M	Blackwood River Valley Great Southern Margaret River Region Bunbury Geographe Southern Forests
Australia's North West Visitor Spend: $1,084M Overnight Visitors: 1.6M	Broome & Dampier Peninsular The Kimberley The Pilbara
Australia's Coral Coast Visitor Spend: $766M Overnight Visitors: 1.1M	Indian Ocean Drive Ningaloo Reef Shark Bay
Australia's Golden Outback Visitor Spend: $630M Overnight Visitors: 1.3M	Esperance & the South Coast Wheatbelt & Wave Rock Kalgoorlie & Goldfields Gascoyne Murchison

Perth is the priority destination for tourism infrastructure because it is the gateway destination for international and interstate visitors to regional WA. Investment in Perth infrastructure which attracts out-of-state demand benefits all WA tourism regions as does reducing Perth capacity constraints.

Perth is the priority destination for tourism infrastructure

Assessment Criteria

When assessing tourism infrastructure projects several criteria should be considered beyond direct cost benefit analysis. Respondents to the tourism infrastructure survey identified the following criteria (in order of importance) for evaluating tourism infrastructure:

1. Enhancing the quality of the visitor experience
2. Increasing visitor numbers and removing capacity constraints
3. Increasing visitor expenditure
4. Dispersing visitors to regional destinations
5. Preserving culture, heritage and the environment
6. Addressing peak periods and seasonality issues
7. Diversifying visitor markets
8. Preventing or mitigating climate change impacts

The tourism infrastructure priorities identified in this submission have been selected based on these criteria.

Tourism Infrastructure Planning and Clustering

State Departments, Regional Development Commissions and Local Government Authorities will all plan and propose infrastructure priorities based on their geographic and portfolio remit.

Infrastructure WA could engage the tourism industry via Tourism Council WA and destination marketing bodies via Tourism Western Australia to assess infrastructure priorities from a tourism prospective. The primary purpose of this assessment would be to:

- Identify infrastructure gaps in the tourism distribution chain across along key visitor journeys and in key destinations.
- Cluster smaller related projects at the destination level
- Evaluate the tourism impact of infrastructure on the destination such as the ability to supply peak periods or drive demand in non-peak periods.

Part 4

Priority Tourism Infrastructure Projects

Based on previous research papers and the recent tourism industry survey, Tourism Council WA has identified a range of critical tourism infrastructure projects and clusters. These projects have been evaluated in line with the issues and recommendations in this submission.

The following priority projects are proposed for inclusion in the State Infrastructure Strategy.

Priority Infrastructure Projects	Funding	Type	Destination	Impact
Expansion of PCEC Business event delegates have high daily spend and raise demand for CBD hotels, tours and attractions. PCEC is the oldest convention and exhibition centre of any State. All other States have built new or expanded facilities. PCEC is no longer a competitive venue to attract existing business events and lacks the floor space to grow visitation. This is the primary infrastructure supply constraint in WA tourism. See Appendix 1 Missing Pieces: PCEC Expansion	Public & Private	Attraction	Perth City	Increase visitation Increase visitor expenditure Enhance visitor experience Addressing peaks and seasonality Diversifying visitor markets
Electric Vehicle Network (EVN) An EVN is the new infrastructure needed to mitigate climate change impacts for visitor journeys in our 'Road Trip' State. The EVN will also assist branding and our reputation as a sustainable destination. The EVN must be designed to supply the next generation of EV campervans and recreation vehicles and long haul coaches. The EVN needs to connect to SA and NT border for trans-Australian journeys.	Public	Access	All	Dispersing visitors to the regions Enhance visitor experience Prevent & mitigate climate change
Perth Riverside Attractions Cluster A cluster of private and public attractions along the Swan River to connect and activate key precincts such as Elizabeth Quay and Kings Park. A major outdoor attraction such as the Perth Cable Car is needed plus a diverse range of smaller facilities. Require EOIs for land release and acceptance of market-led proposals together with reform of land use approvals for attractions. See Appendix 2 - Missing Pieces: The Perth Cable Car See Appendix 3 - New Perth Attractions	Private	Attraction	Perth City	Enhance visitor experience Increasing visitor expenditure Diversifying visitor markets
Staff Housing and Regional Resorts This project requires implementation of the registration system for short stay accommodation and release of public land to provide certainty and attract private accommodation development for staff housing and/or resorts. Public investment in additional housing for seasonal workers in tourism and agriculture will also be required to address market failure. The project will drive high yield tourism through enhanced staff customer service and resort facilities.	Private & Public	Accommodation	All Regions	Addressing peaks and seasonality Enhance visitor experience Increase visitor expenditure

Priority Infrastructure Projects	Funding	Type	Destination	Impact
National Aboriginal Cultural Centre Dedicated 'national' facility for world class interpretation of aboriginal culture. Requires unique design and Swan River location as part of the attractions cluster. See Appendix 4 - The Next Generation of Australian Icons	Public	Attraction	Perth City	Enhance visitor experience Increasing visitor expenditure Preserving culture and heritage and the environment
Kimberley Event Centre A multipurpose event centre to attract event attendees to Broome in non-peak periods. Will maximise value of existing accommodation and aviation infrastructure. The centre would also extend the season for leisure aviation services and seasonal workers. Could be coupled with staff housing development and a permanent Aboriginal cultural exhibit. Would be developed on gifted private land that is development ready and engage private operators of catering and events integrated with existing accommodation and hospitality staff and capacity. See Appendix 5 – Kimberley Convention and Exhibition Centre	Public & Private	Attraction	Broome & Dampier Peninsular	Addressing peaks and seasonality Dispersing visitors to the regions Diversifying visitor markets
Australia's Coral Coast (ACC) Cluster ACC has experienced strong growth, enabled by investment in Indian Ocean Drive and destination marketing. The destination lacks the amenities to maintain a quality visitor experience and needs new facilities to attract repeat self-drive visitors. Cluster includes jetties and marine tourism facilities along the coast and islands. National park attractions, trails and facilities upgrades, and pink lake visitor amenities. This is a cluster of small projects along the road journey and destinations from Perth to Shark Bay.	Public	Attraction Transport Amenities	ACC	Enhance visitor experience Increase visitation Dispersing visitors to the regions Preserving the environment
Busselton Jetty Underwater Discovery Centre Busselton Jetty is at capacity. The Underwater Discovery Centre would create a new world class attraction for first time visitors and drive repeat visitation. See Appendix 4 - The Next Generation of Australian Icons	Public	Attraction	Margaret River Region	Increase visitation Enhance visitor experience Dispersing visitors to the regions
Rottnest Island Infrastructure Cluster Upgrade of essential infrastructure and visitor amenities. Development of new public attractions and further development of private tourism facilities.	Public & Private	Attraction Amenities		Preserving culture and heritage and the environment
Australia's South West Trails Cluster Development of walking and mountain bike trails across land tenures. Particularly loop trails.	Public	Attraction Transport Amenities	ASW	Increase visitation Dispersing visitors to the regions

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