

New Attractions for **Perth**





New Attractions for Perth

Contents /

1. Attractions	4
What are Attractions?.....	4
How do Attractions Drive Tourism?.....	4
Case Study: When Harry Met Sydney	4
What is a Major Attraction?	4
Government and Non-Government Attractions.....	4
How does Perth Compare?.....	5
New Perth Attractions Needed	5
Case Study – Fremantle Markets	6
2. Perth’s Current Attractions & Experiences	7
Major Attractions.....	7
Attractions & Experiences	7
3. Attractions in Other States	8
What have Other States Done?.....	8
What are Other States Planning?	9
4. Enhancing Current Perth Attractions	10
New Museum WA	10
Art Gallery of Western Australia	10
Perth’s Outback Splash (formerly The Maze).....	10
5. Proposed New Perth Attractions	11
Innovative New Proposals	11
Major Attractions.....	11
Other Attractions & Experiences.....	12
6. A Shared Brand for Perth	14
7. Community Support	15
8. Jobs and Economic Impact	16
9. Barriers to New Perth Attractions	17
Lack of Strategic Planning	17
Multiple Approval Authorities.....	17
Lack of Expertise	17
Loss of Innovative Proposals.....	17
Narrow Assessment of Risk and Public Interest Assessment ..	18
Disproportionate Regulation.....	18
Cumulative Impact.....	18
10. Looking Ahead	19
National Aboriginal Cultural Centre.....	19
East Perth Power Station Site	20
11. Recommendations	21
Strategic Planning	21
Whole-of-Government Approach.....	21
Call in Power.....	21
Appendix 1	
Outback Splash - Finding a Way Through the Approvals Process ..	22

1. Attractions

What are Attractions?

Attractions are essential components for any successful destination. Attractions provide visitors something to do, rather than just something to see. They provide memorable and 'braggable' experiences for visitors.

For the purposes of this project, attractions are leisure and tourism experiences which add to the natural, social and cultural values of a destination. Attractions add value by providing greater:

- Movement and journeys;
- Storytelling and interpretation;
- Emotional engagement and unique perspectives; and
- Hospitality, shopping, therapy, cultural and leisure services.

Attractions provide greater access, appreciation and enjoyment of our places, parks and precincts. Attractions are fun, generate word-of-mouth promotion, and tell the story of Perth to visitors and locals alike.

Attractions are marketed outside Perth and draw people to a destination. They have an entry price, or some other fee, which patrons are willing to pay for the added value they experience.

How do Attractions Drive Tourism?

Attractions increase visitor numbers and spend by providing:

- "Braggable" experiences and word-of-mouth promotion;
- Experiences which "live" the destination brand;
- Greater destination value for the same travel costs;
- Bookable product which converts destination marketing into actual trips;
- Commissionable product for global sale by travel agents and inclusion in packages and tours; and
- Something new, especially for repeat visitation.

Attractions are the 'things to do' that people will travel to a destination to experience. Attractions sell themselves and define a destination's brand.

CASE STUDY /

When Harry Met Sydney...

When Prince Harry visited Sydney in October 2018, his visit was leveraged by the State Tourism Organisation, Destination NSW, to tell the story of the destination through attractions and inspire potential visitors to research, and possibly book, a trip to Sydney.

Images of Prince Harry participating in the Sydney BridgeClimb went worldwide through social media and picked up significant traditional media, particularly in the United Kingdom. The public relations value of such an activity is priceless, implanting the idea of a trip to Sydney in the minds of millions across the globe.

What is a Major Attraction?

Major attractions have international profile and can attract visitors from across the world. Major attractions are "must do" experiences for visitors to a destination and host a high proportion of out-of-state patrons as well as locals.

Most importantly, major attractions have the appeal and capacity to host significant visitation. In Australian tourism a major attraction would expect to host more than 100,000 patrons per annum.

Government and Non-Government Attractions

Most of Perth's existing attractions are State Government owned and operated. This means that they rely on taxpayer funding to invest in development and marketing. By comparison with other destinations, Perth has a limited number of non-government attractions operated by non-profit or private sector organisations.

Attractions such as the Perth Mint can be owned by government but operated commercially. Alternatively, State land and assets can operate in partnership with tourism operators through a lease, licence or concession. For example, Rottnest Island Authority partners with ferry companies to provide access to the island and to collect the government landing fees from patrons via the ferry ticket price.

Attractions which are operated by private sector organisations are dedicated to providing experiences which attract patrons. One advantage of these attractions is that 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.



Fremantle Prison, which brings in more than 150,000 patrons per annum, opened in 1992.



How Does Perth Compare?

Compared with other capital cities, Perth has the lowest percentage of international visitors who visit attractions in the course of their visit¹. International visitors to Perth who visit attractions stay, on average, 6.7 days longer and spend \$2,468 more per trip².

Developing existing attractions and creating new leisure experiences in Perth will ensure the city draws in more visitors, who will stay longer and spend more.

Over the past 18 months, Perth has experienced a general decline in visitation and visitor expenditure, unable to compete with other States which are investing more and expressing their destination values through inspirational and aspirational attractions. Giving visitors something to do is one of the greatest challenges faced by the WA tourism industry in the medium term.

City	% international visitors who visit attractions during their trip
Gold Coast	47%
Melbourne	32%
Brisbane	29%
Hobart	27%
Adelaide	25%
Darwin	23%
Canberra	23%
Sydney	22%
Perth	13%

New Perth Attractions Needed

Perth has a range of existing attractions providing visitors with memorable experiences. However, Perth's last new major attraction which brings in more than 100,000 patrons per annum, Fremantle Prison, opened in 1992.

Compared with other states which have had new attractions developed as recently as 2016, Perth is falling behind in delivering new attractions that will draw in international and interstate visitors.

In the 27 years since a new major attraction opened in Perth, the population of Western Australia has increased by almost one million, to more than 2.5 million people, and the number of international visitors to Australia has climbed from three million to almost 8.5 million.

In an increasingly competitive environment, destinations need to offer more to do, see and experience in order to attract visitors who have a multitude of appealing destinations competing for their attention.

State Government can invest in new attractions and enhancing existing attractions. These proposals receive government approvals, but require major taxpayer investment. Alternatively, the private sector can invest in attractions without taxpayer funding, but these projects struggle to pass through the government bureaucracy and approval processes.

¹ Tourism Research Australia International Visitor Survey (IVS) – Three-year average (2015-2017) of percentage of international visitors who visit attractions in the course of their visit to a major Australian city. Attractions is a grouping of IVS activities "Amusement and Theme Parks", "Tourist Trains" and "Visit a health spa/sanctuary/well-being centre".

² Tourism Research Australia International Visitor Survey (IVS) – Based on average amount of nights stayed by visitors and spend per trip.

CASE STUDY / *Fremantle Markets*

Fremantle Markets is a commercial attraction visited by more than 2.6 million people every year, or around 45,000 people per week – more than any other Perth attraction. Fremantle Markets invests approximately \$400,000 per annum on marketing to attract visitors.

Retail turnover at the markets exceeds \$40 million per year, with many other local tourist attractions and businesses benefiting from the influx of visitors. On average, 30 tourist coaches deliver visitors weekly to the Markets, which are open year-round and every week from Friday to Sunday, as well as Monday public holidays.

While a majority of visitors to Fremantle Markets are from Perth and Western Australia, around 30% of visitors are international, and 20% from interstate. The Markets attract attention from countries including Singapore, United Kingdom, Malaysia, United States and New Zealand.

Fremantle Markets creates and encourages a sense of community and provides a different experience from shopping centres and supermarkets through a unique market atmosphere drawing on the historic importance of markets as points of commerce, trade and cultural hubs. Fremantle Markets creates an authentic market experience mixing performance, events, shopping, eating and drinking together, to replicate historical market experiences.

Fremantle Markets attracts more than two million visitors each year.



2. Perth's Current Attractions & Experiences

Perth's existing attractions are crucial to both WA tourism and what the city offers to locals. State attractions such as Perth Zoo, and private sector attractions such as Adventure World, are part of our shared experience and the identity of Perth as a destination.

Major Attractions

Each year, Perth's existing attractions welcome millions of patrons, predominantly local residents. The following *major attractions* are visited by more than 100,000 patrons per annum³.

Visitor Numbers	Major Attractions	Opened
2 Million +	Fremantle Markets	1897
500,000 - 1 Million	Perth Zoo Rottneest Island (Air and Sea Access)	1898
100,000 – 500,000	WA Museum Perth WA Maritime Museum (Shipwrecks and 'new' museums ⁴) AQWA Fremantle Prison Art Gallery of Western Australia Scitech	1891 1979 1988 1992 1895 1988
Other ⁵	Adventure World Outback Splash (The Maze)	1982 1981

Attractions and Experiences

In addition to Perth's major attractions, the following attractions provide high value experiences to visitors and locals.

Visitor Numbers	Other Attractions & Experiences	Opened
50,000 - 100,000	Perth Mint Rockingham Wild Encounters The Bell Tower	1899 1989 2000
0 - 50,000	Araluen	1990

EXISTING PERTH ATTRACTIONS /



Fremantle Markets



Rottneest Island



WA Museum



Art Gallery of WA



Adventure World



Fremantle Prison



Perth Zoo



The Bell Tower



Perth Mint



Maritime Museum



Araluen



Scitech



Rockingham
Wild Encounters



WA Shipwrecks
Museum



Outback Splash
(The Maze)

³ Association of Perth Attractions. Please note, not all attractions may participate in this association or share patronage figures.

⁴ The WA Maritime Museum was opened in 1979. In 2001 the 'new' WA Maritime Museum location opened to house Australia II and a larger maritime collection. The previous location became the Shipwrecks Museum.

⁵ Precise patronage figures for these private sector attractions are commercial information and not publicly available.

3. Attractions in Other States

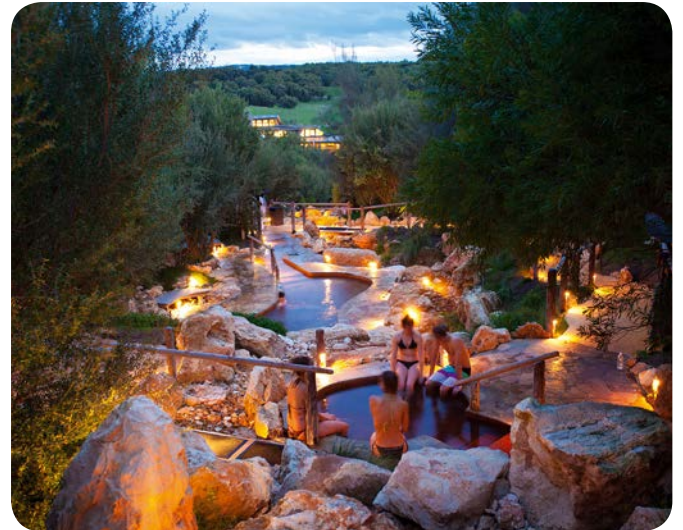
What have other States done?

While Perth has not developed a new major attraction in more than a quarter of a century, other states have developed new innovative attractions and experiences. Many of these new attractions, such as Mona in Hobart and BridgeClimb in Sydney, have become signature experiences which garner worldwide attention and attract visitors from around the globe.

These signature experience attractions define the destination's brand and answer the visitors' simple question: *what is there to do?*



BridgeClimb Sydney Opened: 1998
Scale to the summit of the Sydney Harbour Bridge with BridgeClimb. More than 4 million local and international visitors have participated in the climb since 1998.



Peninsula Hot Springs Victoria Opened: 1997
Located 90 minutes from Melbourne on the Mornington Peninsula, connect to nature with geothermal mineral springs and day spa.



Mona Hobart Opened: 2011
Mona showcases the highlights of David Walsh's \$110 million private collection of art and antiquities, as well as hosting a busy exhibitions program. Includes a winery, restaurant and bars.



RoofClimb Adelaide Opened: 2016
An impressive walk of Adelaide Oval's curved roofline with spectacular views by day or night.



Roar and Suore Opened: 2009

Situated in the middle of Sydney's Taronga Zoo, a harbour-side campsite with an opportunity to get up close with the Zoo's animals.



Scenic Cableway Blue Mountains Opened: 2001

A cable car providing panoramic views of the Blue Mountains.



Skyrail Rainforest Cableway Cairns Opened: 1995

A gondola ride experience over the tropical world-heritage rainforest in North Queensland.



Puuphouse Point Lake St Clair Opened: 2015

An accommodation experience inside a Tasmanian Wilderness World Heritage Area.

What are Other States Planning?

Other states have already approved, and are working towards, developing new unique movement-based experience attractions, such as cable cars and ziplines.



Cradle Mountain National Park Cable Car in Tasmania

A low-level cable car departing from within the village visitor centre and arriving at Dove Lake.



Mt Coot-tha Zipline Fly-Through in Queensland

A treetop canopy zipline tour providing a guided learning experience of Mt Coot-tha's flora, fauna and Aboriginal cultural heritage.

4. Enhancing Current Perth Attractions

Current private sector attractions such as AQWA and Adventure World constantly reinvest in new experiences, exhibits and hospitality to retain and attract patrons. In addition to this investment there are also several projects underway to enhance and expand Perth's current attractions.



New Museum WA

The State Government has committed \$397 million to the new Museum for WA. The new museum, three times the size of the old building, is under construction and expected to be completed in 2020. The expansion is projected to attract 450,000 visitors in its first year, including 33% international visitors, 31% interstate visitors and 36% intrastate visitors.

Museums and art galleries are popular tourist destinations, with 31% of international visitors to Perth visiting a museum or art gallery during their trip⁶. International visitors to Perth who visit museums or art galleries stay on average 4.8 days longer and spend \$1,386 more per trip⁷.

The new Museum will act as a gateway to explore all of Western Australia, housing thousands of objects from the state's collection which reflect the diverse people and communities of WA, with Aboriginal stories integrated throughout. The new Museum will house 6,000 square metres of galleries including large-scale special exhibitions. Featuring learning studios, spaces to experience the behind-the-scenes work of the WA Museum, as well as exciting retail and café spaces, it will create 3,300 jobs.

The new Museum for WA is expected to attract approximately 75,000 additional visitors per annum. These visitors would stay longer and spend an additional \$8.4 million in WA, creating \$6.4 million in Gross State Product (GSP) and 57 Full Time Equivalent jobs across the state⁸.



Art Gallery of Western Australia

The State Government has committed to a \$10 million redevelopment of the Art Gallery of Western Australia. The project includes changes to the gallery entrance, as well as adding a new restaurant overlooking nearby wetlands, retail shops, and a proposed rooftop space.

The new rooftop area would provide space for art, exhibitions and events in an outdoor hospitality venue with unique views of the precinct.

It is expected the leaseholder of the new restaurant would operate the proposed rooftop function centre.

In 2017-18, 376,000 people visited the Art Gallery of Western Australia, with 12% international visitors and 20% interstate visitors. The rooftop function centre is expected to attract an additional 5,000 visitors per annum. These visitors would stay longer and spend an additional \$270,000 in WA⁹.



Perth's Outback Splash

Outback Splash is a family fun park located on the doorstep of the Swan Valley, just a 45-minute drive from Perth CBD. Patrons can visit the park year round and enjoy a variety of wet and dry attractions from the waterslide playground to challenging mazes and Australian native wildlife.

The family-owned business, approvals permitting, plans to expand and enhance the Park ongoing. In addition to the waterslides due to open in 2019, the owners believe a pool or lazy river attraction would best meet the needs of existing and future guests.

The Park is located in an area zoned General Rural. While tourism businesses can operate within this zone, it is at the discretion of both local government and the Department of Planning to issue approvals. Since lodging a planning application to add to the attraction in April 2015, the application process has spanned across almost four years, with several hurdles emerging (see Appendix 1 – Outback Splash – Finding a Way Through the Approvals Process).

The Park estimates the new attraction in 2019 will result in an additional 40,000 visitors per annum. The long-term development plan is estimated to achieve 400,000 additional visitors per annum with at least 5% being international visitors and 5% being interstate visitors. These visitors would stay longer and spend an additional \$16.5 million in WA, creating \$12.7 million in GSP and 112 FTE jobs across the state¹⁰.

⁶ Tourism Research Australia International Visitor Survey (IVS) – Three-year average (2015-2017) of percentage of international visitors who visit "Museums and art galleries" in the course of their visit to a major Australian city.

⁷ Tourism Research Australia International Visitor Survey (IVS) – Based on average amount of nights stayed by visitors and spend per trip.

⁸ Lucid Economics, Perth Tourism Attractions Economic Impact Assessment, February 2019

⁹ Lucid Economics, Perth Tourism Attractions Economic Impact Assessment, February 2019

¹⁰ Lucid Economics, Perth Tourism Attractions Economic Impact Assessment, February 2019

5. Proposed New Perth Attractions

It is critical that Perth delivers a range of diverse new attractions, which in turn will draw in more visitors, create more jobs and build revenue for the state. New attractions will provide potential visitors with a new image of Perth as an exciting destination with unique experiences for everyone.

State Government investment in developing and marketing government attractions requires significant taxpayer funding. Given current State Government finances, the capacity for further government investment is limited. Alternatively, there are many non-government entities and individuals with the passion and the means to build and operate the attractions that Perth needs.

Innovative New Proposals

In 2018, Tourism Council WA called for proposals from tourism businesses interested in developing new attractions and experiences. This 'bottom up' process identified 16 potential Perth attractions which are grassroots, innovative proposals from individual proponents.

For each of the proposed attractions there is at least one proponent with the financial means or operational expertise to complete that attraction. These proposed attractions would be tourism businesses; not owned, operated or subsidised by the government.

These proposals will help put Perth on the map as a global visitor destination by creating unique nature-based attractions which will capture global attention and draw in visitors from all over the world.

Tourism Council WA has estimated the number of visitors that would use each new attraction based on physical capacity and estimated visitor demand. In total, it is estimated that the 16 attractions would host more than 2 million patrons per annum, including 1.18 million Western Australians and 870,000 interstate and international guests. Of the 16 proposals, the first four would be major attractions able to attract and host more than 100,000 patrons per annum.

Several of these proposed attractions are currently seeking approval through State and Local Government approval processes.

Major Attractions



1. Perth Cable Car

Cable car from Elizabeth Quay to Kings Park. An accessible, must-do signature experience for locals and visitors. Could include innovative dining and event experiences.

Will attract 648,000 visitors per annum:
323,000 Western Australians
195,000 International Visitors
130,000 Interstate Visitors



2. Resort Deck on the Swan River

A pontoon or barge on the Swan River which offers a resort-style bar, catering, deck chairs, hospitality and entertainment.

Will attract 600,000 visitors per annum:
300,000 Western Australians
180,000 International Visitors
120,000 Interstate Visitors



3. Wave Park by the Swan River

Wave park surfing lagoon adjacent to the Swan River at Alfred Cove. Waves will range from white water waves for beginner surfers, up to barrelling waves designed for performance surfing. Lagoon-side amenities will offer recreation and hospitality for everyone.

Will attract 300,000 visitors per annum:
240,000 Western Australians
24,000 International Visitors
36,000 Interstate Visitors



4. Thermal Baths by the Swan River

Immerse in an indoor thermal bath drawn from Perth's natural aquifers while enjoying peaceful views of the Swan River. Communal and private baths are located indoors, with massage, wellness and spa treatments available. Located by the Swan in landscaped gardens.

Will attract 170,000 visitors per annum:
136,000 Western Australians
17,000 International Visitors
17,000 Interstate Visitors

Other Attractions and Experiences



5. Thermal Baths on Rottneest Island

Immerse in outdoor thermal baths on Rottneest Island in sculptured rock gardens and pools. Massage and day spa treatments available.

Will attract 80,000 visitors per annum:
56,000 Western Australians
12,000 International Visitors
12,000 Interstate Visitors



6. Swan River Zipline

Traverse the Swan River from Kings Park to South Perth via zipline, also known as a "flying fox". Travelling at up to 80km/hr, patrons will fly 660 metres across the river, experiencing breathtaking views of the park, river and city.

Will attract 70,000 visitors per annum:
28,000 Western Australians
28,000 International Visitors
14,000 Interstate Visitors



7. Ropes Course & Zipline on Rottneest Island

Ropes courses, obstacle courses and ziplines on Rottneest Island, offering a variety of challenges and levels of difficulty to suit a range of visitors.

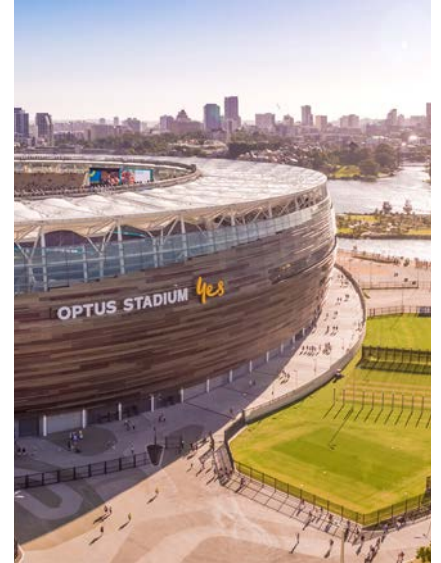
Will attract 35,000 visitors per annum:
24,500 Western Australians
5,250 International Visitors
5,250 Interstate Visitors



8. Stadium Footbridge Climb

A challenging, guided climb ascending and traversing the arches of the Matagarup Bridge connecting East Perth with Optus Stadium. The bridge can also facilitate the launch of a proposed zipline. The climb provides exhilarating views of Perth and the river.

Will attract 35,000 visitors per annum:
21,000 Western Australians
7,000 International Visitors
7,000 Interstate Visitors



9. Stadium Roof Climb

A challenging, guided climb ascending and traversing the roof of Optus Stadium. The roof climb provides exhilarating views of Perth and a unique perspective on "game day".

Will attract 25,000 visitors per annum:
12,500 Western Australians
5,000 International Visitors
7,500 Interstate Visitors



10. Helicopter Tours from a Swan River Helipad

Helipad on the Swan River for helicopter tours of Perth and beyond.

Will attract 18,000 visitors per annum:
9,000 Western Australians
5,400 International Visitors
3,600 Interstate Visitors



11. BBQ Buoys on the Swan River

A self-drive floating picnic on the Swan River aboard a BBQ Buoy seating up to 10 guests around a central table. The Buoy is equipped with an umbrella cover, drinks cooler and gas grill for tasty barbecues. Can be self-catered or food provided.

Will attract 16,000 visitors per annum:
8,000 Western Australians
4,800 International Visitors
3,200 Interstate Visitors



12. Ropes Course in Kings Park

Ropes courses and obstacle courses in Kings Park offering a variety of challenges and levels of difficulty to suit a range of visitors.

Will attract 15,000 visitors per annum:
6,000 Western Australians
6,000 International Visitors
3,000 Interstate Visitors



13. Experiential Eco-accommodation by the Swan River

An overnight stay in experiential accommodation beside or on the Swan River. Could include treehouses, houseboats, glamping, quirky or architecturally-unique eco-accommodation experiences.

Will attract 10,000 visitors per annum:
4,000 Western Australians
4,000 International Visitors
2,000 Interstate Visitors



14. Experiential Eco-accommodation in Kings Park

An overnight stay in experiential accommodation in Kings Park. Could include treehouses, glamping, quirky or architecturally-unique eco accommodation experiences.

Will attract 10,000 visitors per annum:
4,000 Western Australians
4,000 International Visitors
2,000 Interstate Visitors



15. Perth Abseil

Climb one of Perth's tallest buildings and abseil to the ground.

Will attract 10,000 visitors per annum:
5,000 Western Australians
3,000 International Visitors
2,000 Interstate Visitors



16. Seaplane tours from the Swan River

Seaplanes taking off and landing on the Swan River for tours of Perth and beyond.

Will attract 9,000 visitors per annum:
4,500 Western Australians
2,700 International Visitors
1,800 Interstate Visitors

6. A Shared Brand for Perth

Although each of the proposed new attractions are independent proposals, looking across the “bottom up” proposals some common themes have emerged. These themes showcase the natural brand of Perth which would be experienced by locals and visitors alike through the proposed attractions.

The proposed attractions will be based on or around the Swan River and Rottnest Island focusing on the themes of water, movement, open sky and city-in-nature. This will give new and returning visitors more options to explore on and around these destinations.



Water

Attractions around and on the Swan River, activating the River as a world-class tourist destination and providing more water-based activities for visitors to do on the Swan.



Movement

Attractions focusing on movement around and over the Swan River and Rottnest Island.

Open Sky

Attractions providing an open sky experience above the river, in a helicopter or seaplane with stunning and memorable views of Perth.

City-in-nature

Attractions providing visitors with an immersive and unique outdoor experience around the city, allowing visitors to experience the best Perth has to offer.





The strongest support was from couples with children.

7. Community Support

Government approvals for attractions tend to focus on the views of select stakeholder groups, rather than considering the views of the broader community. Proposed attractions provide access and experiences to residents across Perth, not just local residents and existing users.

The views of the broader community should be considered when assessing applications. IPSOS conducted independent opinion polling across metropolitan Perth on each of the 16 proposed new attractions¹¹. The opinion poll showed strong community support for each attraction. The average support across the proposed attractions was:

- 61% support (36% support and 25% strongly support);
- 26% neutral;
- 11% opposed (7% opposed and 4% strongly opposed); and
- 3% didn't know.

The opinion poll reported strong support across all age, gender, employment status, and income and household status demographic groups. There was little variation due to gender, employment status or income. The strongest household status support was from couples with children. The strongest age support was from 35-54 years, then 18-35 years, followed by 55+.

The opinion poll also asked Perth residents if they would be interested in using the attraction as a paying customer. The average response was 47% of residents across each of the 16 proposed attractions and between 500,000 to 800,000 estimated potential Perth patrons for each attraction.

Table 1. Community Support for Proposed New Non-Government Attractions

Proposed Attractions	Strongly support	Support	Neutral	Oppose	Strongly oppose	Don't know
1. Perth Cable Car	35%	33%	17%	5%	7%	3%
2. Resort Deck on the Swan River	24%	35%	27%	6%	3%	4%
3. Wave Park by the Swan River	24%	28%	27%	9%	8%	3%
4. Thermal Baths by the Swan River	23%	33%	31%	8%	3%	3%
5. Thermal Baths on Rottnest Island	23%	34%	29%	6%	4%	3%
6. Swan River Zipline	30%	34%	22%	7%	4%	4%
7. Ropes Course & Zipline on Rottnest Island	28%	36%	25%	5%	3%	3%
8. Stadium Footbridge Climb	28%	40%	25%	3%	1%	3%
9. Stadium Roof Climb	27%	39%	26%	4%	1%	3%
10. Helicopter Tours from a Swan River Helipad	22%	42%	27%	4%	3%	2%
11. BBQ Buoys on the Swan River	21%	33%	27%	11%	4%	4%
12. Ropes Course in Kings Park	28%	38%	24%	4%	2%	3%
13. Experiential Eco-accommodation by the Swan River	21%	36%	28%	7%	3%	3%
14. Experiential Eco-accommodation in Kings Park	18%	35%	26%	13%	8%	2%
15. Perth Abseil	22%	40%	28%	4%	2%	4%
16. Seaplanes tours from the Swan River	21%	38%	29%	7%	2%	2%
Average	25%	36%	26%	7%	4%	3%

¹¹ IPSOS online omnibus survey conducted 13 July – 20 July 2018 of 955 18+ residents in metropolitan Perth and IPSOS online omnibus study 22 Oct -29 Oct 2016 of 919 18+ residents. Data was post weighted to be reflective of ABS age and gender breakdown.

8. Jobs and Economic Impact

Attractions drive additional visitors to Western Australia and encourage visitors to stay longer by providing more to do. Additional visitors staying longer and spending more create economic activity and jobs in WA. This economic activity also creates additional revenue for State Government.

Tourism Council WA has commissioned independent economic analysis of the impact of new attractions in Perth¹². It is difficult to estimate the number of additional visitors which new attractions would bring to WA, hence this analysis does not assume any increase in visitation.

Instead, the economic analysis only assumes that existing visitors using these attractions would stay longer. **The analysis therefore is conservative and significantly underestimates the actual economic impact of new attractions.** Nonetheless, the analysis shows the proposed new attractions would in total create an estimated:

- \$165 million per annum in increased visitor expenditure;
- \$127 million per annum in total additional Gross State Product (GSP) (\$66 million direct and \$66 million indirect);
- 1,116 in total Full Time Equivalent (FTE) jobs (766 direct and 353 indirect); and
- \$18.5 million per annum in additional State Government revenue.

The \$18.5 million in additional annual State Government Revenue includes \$1.8 million in total payroll tax, \$10.5 million in WA share of GST (@ 70% share) and \$6.2 million in State Government lease or licence fees for attractions on State land or assets.

Additional visitors staying longer and spending more create economic activity and jobs in WA.

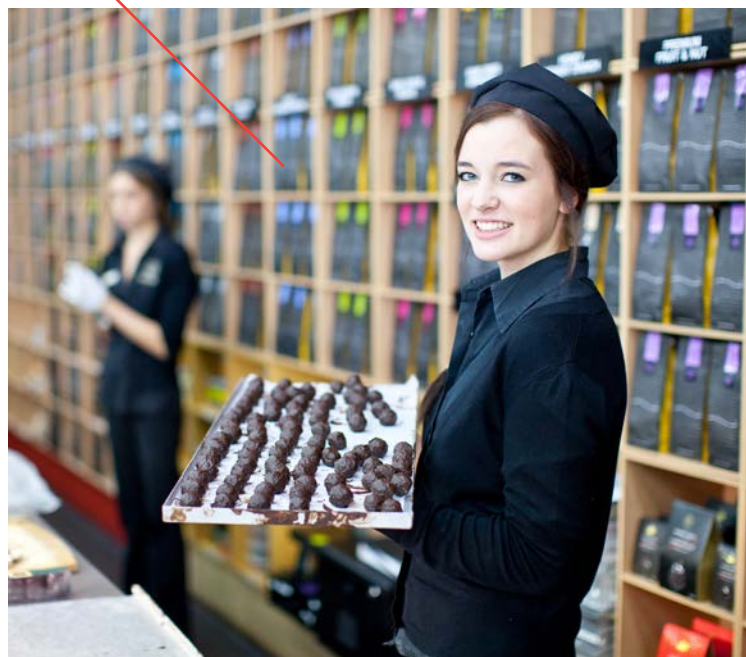


Table: Economic Impact of Out-of-State Visitors to Proposed New Non-Government Attractions

Proposed Attraction	Visitor Spend Increase (\$ Million)	Total GSP (\$Million)	Total FTE Jobs (\$Million)	Total State Revenue (\$Million)
1. Perth Cable Car	\$53.5	\$41.2	363	\$4.8
2. Resort Deck on the Swan River	\$48.0	\$36.9	325	\$6.1
3. Wave Park by the Swan River	\$10.6	\$8.2	72	\$0.8
4. Thermal Baths by the Swan River	\$5.8	\$4.4	39	\$1.1
5. Thermal Baths on Rottne Island	\$10.4	\$8.0	71	\$1.1
6. Swan River Zipline	\$8.4	\$6.5	57	\$1.1
7. Ropes Course & Zipline on Rottne Island	\$5.2	\$4.0	35	\$0.5
8. Stadium Footbridge Climb	\$3.0	\$2.3	20	\$0.4
9. Stadium Roof Climb	\$2.8	\$2.1	19	\$0.4
10. Helicopter Tours from a Swan River Helipad	\$2.2	\$1.7	15	\$0.3
11. BBQ Buoys on the Swan River	\$1.7	\$1.3	11	\$0.3
12. Ropes Course in Kings Park	\$1.5	\$1.2	10	\$0.2
13. Experiential Eco-accommodation by the Swan River	\$2.7	\$2.1	18	\$0.3
14. Experiential Eco-accommodation in Kings Park	\$2.7	\$2.1	18	\$0.3
15. Perth Abseil	\$1.0	\$0.8	7	\$0.1
16. Seaplanes tours from the Swan River	\$5.3	\$4.1	36	\$0.8
Total	\$164.8	\$126.8	1116	\$18.4

¹² Lucid Economics, Perth Tourism Attractions Economic Impact Assessment, February 2019

9. Barriers to New Perth Attractions

All the proposed attractions are centred on and around the Swan River and Rottnest Island, allowing visitors to enjoy Perth's natural appeal of a great climate, blue skies and outdoor lifestyle.

New attractions in these locations require State Government approval as manager of these critical natural assets, as well as the normal range of State and Local Government approvals.

Currently, proponents of new attractions face lengthy approvals processes through multiple, risk-averse Government departments which lack the expertise to genuinely assess proposals. In determining public interest, the current process only considers the opinion of a narrow group of local stakeholders, rather than potential patrons and the wider community.

The major barriers to approval are:

Lack of Strategic Planning

Across Perth there has been minimal strategic planning for new attractions to cater to a growing population and city.

Freehold land has not been zoned or set aside for attractions. Established attractions, such as The Maze, Home of the Outback Splash, emerged in areas primarily zoned rural in what were the city outskirts. These zones do not support the established attractions and it is difficult to see where new large freehold attractions could be established if the current attractions are not able to expand.

The alternative is smaller scale attractions on State land set aside for tourism and recreation, such as Kings Parks, however new attractions in these areas face significant bureaucratic barriers.

Multiple Approval Authorities

There is no one single State Government body with the authority to approve new attractions. Most proposals face around 12 to 14 different approval authorities. Each of the different authorities has the power to stop the attraction by refusing approval or by imposing onerous conditions, but no single body has the overall authority to assess the attraction and establish appropriate conditions.

All attractions must pass through various environmental and safety regulations. The primary agency for safety is the Department of Mines, Industry Regulation and Safety. The primary agency for environment is the Department of Water and Environmental Regulation. Multiple approvals are often needed within each of these agencies. These approvals are appropriate and necessary for a sustainable tourism industry but the process can become unnecessarily complex, risk averse and disproportionate in time and costs for the actual proposal.

Of more significant negative impact are government approvals as landlord. Where a proposal crosses State Land or Water, the responsible agencies must grant a lease, licence or other permission. Many attractions cross multiple landlords, especially those attractions involving the Swan River and Rottnest Island. Agencies typically involved in granting approvals include:

- Metropolitan Redevelopment Authority
- Swan River Trust
- Main Roads Western Australia
- Botanical Parks and Gardens Authority
- Department of Lands
- Department of Planning
- Department of Transport
- Local Government/s

Each of these agencies has a narrow remit in purpose and key stakeholders. None of these agencies has responsibility for the overall approval of attractions.

Again, these additional landlord approvals can become unnecessarily complex, risk averse and disproportionate in time and costs for the actual proposal. In addition to these challenges, State Government approval as a landlord also introduces an additional assessment of 'appropriate use'. Even if a proposal meets all safety and environmental standards, the agency may reject the proposal because it does not consider the attraction to be appropriate. The assessment of appropriateness tends to be conservative focusing on current use and current users, and rejecting new proposals that appeal to the broader community in Perth.

Lack of Expertise

Proposals such as thermal hot spring facilities and ziplines are unusual and government agencies have little experience in assessing these attractions. Agencies without expertise tend to imagine and inflate risks. These agencies often require proponents to fund independent expert consultants to address these risks, at great expense, and then put little faith in the reports because they come from the proponent.

Loss of Innovative Proposals

New and creative attractions and experiences typically emerge from innovative individuals, rather than government agencies. Unfortunately, government agencies struggle with 'market-led' proposals.

Firstly, master planning for State land may effectively prohibit new proposals during the five-year statutory life of the plan, unless they happened to be envisaged and allowed for at the time the plan was made.

Even if the new proposal survives the master plan and other multiple agency approvals, the State Government as landlord may opt to put the proponent through an Expression of Interest process. This means a proponent forfeits their idea, and the work sunk into achieving approvals, and must compete with others for the lease or licence to deliver their own innovation. This potential loss of intellectual property is a major barrier to innovation.



*Proposed attractions are centred
on and around the Swan River and
Rottnest Island, allowing visitors to enjoy
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Narrow Assessment of Risk and Public Interest Assessment

Each of the agencies involved in approving attractions has a narrow remit in terms of purpose and jurisdiction. For example, the remit of land management agencies rarely includes the jobs and economic value of new attractions. This makes the agencies very risk averse as they have no responsibility for the benefits of an attraction, but are responsible for any potential risks within their narrow remit.

Land managers also tend not to look at the broader community interest in new attractions across Perth. These agencies tend to focus on the views of existing users who enjoy access to the State park or precinct. The State land management agencies also tend to focus on the views expressed by the adjacent local council, which in turn focuses on the views of the most vocal residents.

Even though these are State agencies, this process tends to encourage NIMBY-ism rather than an assessment of the interests of the broader residents of Perth and WA.

Throughout the approval process there is no single government agency charged with assessing the overall risk and public interest of the proposal, including the jobs impact and the broad community support for new leisure experiences.

Disproportionate Regulation

A proposed new attraction must pass through the same regulatory approvals process irrespective of the scale of the proposal. Smaller attractions lack the capacity to deal with large government agencies and their extensive approvals processes.

For small scale proposals by SME operators, the cumulative cost in time and expense of the assessment process may simply make the attraction unviable even if approval is secured.

Cumulative Impact

The cumulative impact of the multiple approval processes creates a major barrier to approvals, including:

- Multiple agencies and multiple approvals within each agency means there are multiple powers of veto, but no single agency with authority to approve.
- Even with approval, multiple layers of conditions, and commercial terms may make the attraction unsustainable.
- There is no overall assessment of the public interest.
- Cost of approvals process in time, expense and risk is disproportionate to the economic value of the attraction.

11. Looking Ahead

In addition to approving proposed new attractions, Tourism Council WA believes the WA State Government should take a strategic approach and plan ahead for the next generation of Perth attractions. Of critical importance is planning for a new major public attraction and setting aside a precinct to develop government and non-government attractions.

National Aboriginal Cultural Centre

International visitors to Australia, particularly from UK and Europe, are very interested in Aboriginal culture. However, many international and Australian visitors find it difficult to access Aboriginal cultural experiences and many return home disappointed.

The Australian Tourism Industry Council (ATIC) has identified a National Aboriginal Cultural Centre (NACC) in Perth as the number one priority for the development of iconic attractions across Australia¹³. The NACC would present Aboriginal culture and life from the distant past through early settlement to today.

More than an art gallery, the NACC would provide a focal point for Aboriginal performances, experiences, tours, food and creative industries. An engaging place where visitors from around the world can meet Aboriginal people and experience Aboriginal culture.

Located beside the Swan River, the unique design of the facility should embrace the Swan River and its cultural meaning to Aboriginal people in the past, present and future. The masterplan for Elizabeth Quay currently includes a dedicated site for the NACC.

It is expected the NACC would house the WA State Government's significant collection of Aboriginal art and cultural material. The NACC could also host the University of Western Australia's famous Berndt collection of Aboriginal and Torres Strait Islander cultural objects, art, archives, manuscripts, film and sound and photographic collections. Significant private collections could also be presented and preserved at the NACC including those of Kerry Stokes and Janet Holmes à Court.

The NACC would be the start of Aboriginal cultural journeys across Australia. From Perth visitors would journey to Aboriginal cultural destinations such as Broome & the Kimberley, Darwin and Alice Springs & Uluru.

From concept and design, to building, governance and operation, the NACC would be a collaborative effort engaging the Aboriginal community, the broader Australian community and our international guests. The NACC concept is supported by the WA Indigenous Tourism Operators Council (WAITOC) and Tourism Council WA. The NACC would require a major public investment of approximately \$500 million. TCWA is calling on the next Commonwealth Government to provide joint funding with the State Government for the NACC.

The NACC is expected to attract more than 400,000 patrons per annum including 160,000 international and 80,000 interstate guests per annum. These visitors would stay longer and spend an additional \$31 million in WA, creating \$24 million Gross State Product and 212 FTE jobs across the state¹⁴.

*An engaging place
where visitors from
around the world can
experience Aboriginal culture.*



13. Australian Tourism Industry Council, Next Generation of Australian Icons: 10 projects to grow the Australian tourism industry into the 21st Century, December 2018

14. Lucid Economics, Perth Tourism Attractions Economic Impact Assessment, February 2019

East Perth Power Station Site

Located by the Swan, and connected with the city by river and rail, the East Perth Power Station site is a rare opportunity to set aside a precinct for new Perth attractions and experiences.

The East Perth Power Station is an 8.5 hectare site located between East Parade, Summers Street, the Swan River and the Graham Farmer Freeway. The site is currently unused and is being maintained by the Metropolitan Redevelopment Authority.

Various attractions have been suggested for the site, as well as the opportunity for a unique heritage experience from the adaptive reuse of the former facility. The site could be used for a mix of government and non-government attractions. Developing the site as a tourism experience would complement the shared brand of Perth and add to the compelling cluster of attractions which could be created along the Swan River.

Developing the site as a tourism experience would complement the shared brand of Perth.



Image courtesy Metropolitan Redevelopment Authority

12. Recommendations

Developing new attractions in Perth is an investment which will help diversify the state economy and create more jobs for Western Australians. Tourism Council WA is recommending that State Government streamline approvals processes to encourage future development of new attractions and expansions of existing attractions. Tourism Council WA recommends the following:

1. Strategic Planning

State Government can enhance the long-term development of attractions by:

- Recognising existing attractions and enabling them to expand and enhance their offering through rezoning and other planning measures;
- All master plans for State land management agencies to allow for new 'market-led' attractions proposals during the life of the masterplan, without the need for an EOI process;
- Identifying locations for the future development of new attractions as Perth grows;
- Setting aside the East Perth Power Station site for future development of attractions and leisure experiences in Perth; and
- Planning for the long-term development of major public attractions, including a National Aboriginal Cultural Centre.



2. Whole-of-Government Approach

State Government can establish the Department of Jobs, Tourism, Science and Innovation (DJTSI) and Tourism WA as the lead agencies with a whole-of-government responsibility for facilitating approvals for innovative new tourism attractions. The role of DJTSI/Tourism WA will be to:

- Work with the tourism industry to identify and prioritise attraction proposals;
- Officially assess the public interest value of the proposal in terms of tourism appeal, job creation and broader community support;
- Present to State Cabinet new attractions which are in the public interest, for in-principle approval on a whole-of-government basis; and
- Assist proponents, particularly SMEs, to navigate the approvals process through regulatory agencies.



3. Call in Power

State Government can establish a 'call in' power to provide a single assessment and approval by an independent agency, such as the Department of Planning. The call in power would see:

- DJTSI/Tourism WA present new attractions which are in the public interest to State Cabinet;
- State Cabinet can elect to 'call in' the proposal from multiple agencies to a single approval;
- Regulatory agencies and land management agencies present their assessments and recommended conditions; and
- Department of Planning makes a single overall assessment to reject the proposal or approve the proposal with appropriate conditions.



Appendix 1

Outback Splash - Finding a Way Through the Approvals Process

In 2015, Outback Splash lodged a planning application which included the addition of a toddler pool, two waterslide pools, a series of incidental shade structures, pump house facilities and some additional water attractions.

The Park's location means the attraction is zoned General Rural. While tourism businesses can operate within General Rural zones, it is at the discretion of local government and the Department of Planning to issue approvals. Since lodging the planning application in April 2015, the application process spanned across almost four years, with several hurdles emerging:

- April – May 2015; following the submission to council the business was asked to provide additional detail on the attraction's location in relation to the Gas Pipeline corridor and the clearing of vegetation if required. This information was provided.
- June 2015; the business was asked to provide some additional information on the expected visitation and impact the new attractions would have. Following the provision of this information the DA was then advertised to the public.
- July – August 2015; a number of the team members at local council were on annual leave, and the business was advised that to date the City of Swan had not received any correspondence from Main Roads, the Department of Water, the Health Department, the Department of Planning, or City Building Services.
- September – October 2015; the Department of Planning requested a Metropolitan Regional Scheme Form, the business was asked to:
 - complete additional works on the Traffic Study that had been completed as a part of the original application;
 - provide detail on a previous amalgamation by the Department of Health;
 - to amend the Noise Impact Assessment, that had been a part of the original application. The business was then asked to generate a Noise Management Plan prior to mid- November so that the application could be determined at Council in December 2015.



- November – December 2015; team members from local council were again on leave and the completed Noise Management Plan was not yet assessed.
- January – May 2016; the local council deferred the application outcome to the Department of Planning who on May 31, confirmed the approval with a series of conditions for all applications moving forward. The most impacting of such that the property must be re-zoned prior to any future approvals being issued.
- September 2016; the Building Application (BP 2452/1016) was submitted on September 7 and throughout the month the business negotiated with the local council and the Department of Planning over the location of the pump house, the pool itself and even the shape and location of the two shade sails that would cover the pool.
- May – September 2018; the business conducted geotech studies on site and worked with the Dampier to Bunbury Natural Gas Pipeline to orchestrate a small amount of clearing and site preparations.
- November 2018; prior to completing the Building Application, the business presented the slide tower and waterslide design to local council. Local council advised that the waterslide 'run outs' selected by the manufacturer were a deviation from the 'splash pool' shown in the approved DA 286/15 and that a new Planning Application would need to be submitted. The business advised the local council that the 'run outs' were as, if not more, safe than the 'splash pool,' more environmentally friendly, more appropriate for staffing, more cost effective, and provided guests with a more consistent experience.
- December 2018; the business was advised by The City of Swan that based on the manufacturer's designs, run-outs, pool or otherwise, an amendment application against the existing approval would be required. After seeking the assistance of local Members, The City was able to 'fast-track' the application and determine the outcome without requiring the input of external bodies.
- January 2019; the proposed amendment was approved by The City and the slide manufacturer was able to commence work on the engineering requirements; intending to have the project complete in time for the summer season in 2019/20 as announced previous.

In addition to planning hurdles, Outback Splash reports a lack of support, information sharing and partnership opportunities by development departments at a local council level. From the perspective of an experienced tourism operator, local councils, government departments and legislators must work more cohesively to encourage development.



Images courtesy Funday Entertainment Group

